

Oracle CRM On Demand Online Help

Release 19

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ORACLE®

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1 Getting Started

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

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

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

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

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

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

Accounts. Tracks companies with whom you conduct business.

Contacts. Tracks people associated with your accounts and opportunities.

Opportunities. Manages potential revenue-generating opportunities.

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

Service Requests. Manages customer requests for products or services.

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

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

Solutions. Stores answers to common questions or service issues.

Communication. Manages customer interactions through your call center (Oracle Contact On Demand).

Reports. Generates a variety of reports supplying over 250 separate analyses, including pipeline visibility and sales effectiveness.

Dashboard. Displays a series of charts, graphs, and tables organized around your key business areas.

Additionally, industry-specific solutions contain these record types:

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

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

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

MedEd. Manages medical education events and invitees (Oracle CRM On Demand Life Sciences Edition).

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

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

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

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

What To Do First

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

- [Signing In as a New User](#) (on page 25)
- [Updating Your Personal Details](#) (on page 604)
- [Displaying Your Tabs](#) (on page 619)
- [Importing Your Contacts](#) (on page 198)
- [Creating Records](#) (on page 38)
- [Finding Records](#) (on page 41)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Accounts](#) (on page 181)

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

Note for first-time users:

- You might not see data in reports for the first 24-hour period after signing in because most reports are updated nightly. For example, the reports appearing on the Accounts, Contacts, and Opportunities Homepages will not show data until after that initial period.

- You may not see forecasts, either, because forecast records are generated once a week or once a month. When generating forecast records, the system checks several fields in your records to determine which information to include in the forecast calculations. Therefore, forecast records don't appear until the specified period has elapsed and data exists to include in the forecast.

About Running Other Applications

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

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

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

Signing In as a New User

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

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

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

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

When you sign in for the first time, you are asked to set up a number of security questions. Take note of the security questions and answers that you set up. If you later forget your password, you will be required to answer the security questions to reset your password. For more information about resetting your password, see [Retrieving Your User Sign-In ID or Resetting Your Password](#) (on page 112).

You can change your security questions at any time in Oracle CRM On Demand, for more information, see [Setting Up Your Security Questions](#) (on page 616).

To sign in as a new user

- 1 Click the Oracle CRM On Demand URL that you received in an email.
- 2 On the Sign-In page, enter the temporary password you received in an email.

- 3 Make a note of your user sign-in ID, which is shown in the User Sign In ID field on the Password Update page.
- 4 On the Password Update page, enter a new password of your choice in the New Password field, and then enter it again in the Verify New Password field.

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

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

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

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

- 6 Save your security questions.

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

NOTE: While using the Communications section in Oracle CRM On Demand, if your status changes to offline due to network connection problems, your login session automatically reconnects to the Oracle Contact On Demand server when Oracle CRM On Demand detects that the network is operational again.

About the Interface

Oracle CRM On Demand is built around a Web page interface. If you are familiar with the Web, the look and feel of the user interface will be familiar to you.

All pages in the application share the same basic interface framework.

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

Action Bar

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

If the Action bar is available to your user role, then it appears on the left side of all Oracle CRM On Demand pages by default. You can hide and show the Action bar as required. For more information, see [Showing or Hiding the Action Bar](#) (on page 32).

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

■ Marketing On Demand

If your company is set up to use Oracle CRM On Demand Marketing, this section of the Action bar contains a link that you can click to launch Oracle CRM On Demand Marketing. Oracle CRM On Demand Marketing is an integrated marketing solution for designing and automating marketing

programs. It provides complete lead nurturing. It uses leads from Oracle CRM On Demand and from external sources. It integrates with Web pages for lead nurturing and offer fulfillment.

■ Message Center

The Message Center section contains notes for yourself, notes received from other users, and notes added to the records to which you subscribe. For more information about the Message Center, see [Working with the Message Center](#) (on page 35).

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

■ Search

The Search section lets you find existing records. For example, you can perform a search to determine if a record exists before creating one, thereby reducing the duplication of records. For instructions on using the Search section, see [Finding Records](#) (on page 41).

■ Communication Tools

If your company uses Oracle Contact On Demand, the call center application, you use the Communication Tools and Voice Controls sections in the Action bar to perform tasks in Oracle Contact On Demand.

■ Create

The Create section contains a list of links for record types. When you click a link, a form opens that allows you to quickly add a new record. The form works independently of the main Web pages so you won't lose your place within the application.

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

For instructions on using the Create section, see [Creating Records](#) (on page 38).

■ Recently Viewed

The Recently Viewed section lists the 10 most recently viewed, edited, or created records, including records from previous sessions. Drilling down to the Detail page for a record triggers that record's inclusion in the Recently Viewed section. The record name appears in the list as a link along with an icon corresponding to the type of record it is.

This feature allows you to easily access your active records. If you delete a record, it is removed from the Recently Viewed list. If another user deletes a record, it remains in the Recently Viewed list, and if you select the link, a message is displayed informing you that the link no longer exists.

■ Favorite Records

This section shows the records that you have marked as your favorites. The record name appears in the list as a link along with an icon corresponding to the type of record. This feature allows you to quickly access the records that you use most often. The Favorite Records section in the Action Bar can display up to 10 records at a time. You can view a complete list of your favorites by clicking the Show Full List link. When you click the Show Full List link, the Favorite Records page opens, and you can manage your favorite records.

■ Favorite Lists

This section shows the lists that you have marked as your favorites. The list name appears in the list as a link along with an icon corresponding to the type of record. This feature allows you to quickly access the lists that you use most often. The Favorite Lists section in the Action Bar can display up to 10 lists at a time. You can view a complete list of your favorites by clicking the Show Full List link. When you click the Show Full List link, the Favorite Lists page opens, and you can manage your favorite lists.

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

■ Calendar

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

■ Custom Web applets

Your company administrator can create Web applets that can be added to the Action bar to display HTML Web content (for example, polls, videos) and RSS feeds. For more information about custom Web Applets, see [About Custom Web Applets](#) (on page 1079).

You can expand or collapse the sections in the Action bar. To collapse a section, click the minus icon (-), and to expand a section, click the plus icon (+).

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

If your user role has the appropriate privilege, you can change the layout of your Action bar through the My Setup global link. You can display or hide any of the Action bar sections, including Web applets, that your company administrator has made available in the Action bar layout for your user role. For more information, see [Changing Your Action Bar Layout](#) (on page 621).

Tabs

Across the top of each page are tabs for the main types of records. Click on a tab to go to the Homepage for that record type. For example, if you click the Contacts tab, you go to the Contacts Homepage.

The number of tabs that you see depends on the size and resolution of your browser window and on how many tabs are in your tab layout. If there are more tabs in your tab layout than can fit across the page in your browser window, an arrow appears next to the far right tab. Clicking that arrow opens a list from which you can select any tab that is in your tab layout but is not currently visible.

NOTE: If your browser window is less than 1024 pixels wide and some of your available tabs are not visible, a scroll bar appears at the bottom of the page, allowing you to scroll to the arrow that opens the list of available tabs.

To learn more about the tab layout, see [Displaying Your Tabs](#) (on page 619).

Sections

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

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

A section can contain the following types of information:

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

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

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

Error Messages and On-Screen Help Text

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



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



Global Links

Each page in Oracle CRM On Demand has a series of links across the top. This table describes the action that occurs when you click each link:

Clicking this link	Does this
Training and Support	<p>Opens the Training and Support Homepage, which provides access to a range of Training and support resources, including the schedule of free Oracle CRM On Demand Webinars and other training courses.</p> <p>From this page you can create a service request. Make sure you have the following information:</p> <ul style="list-style-type: none"> ■ Any error messages displayed in your window ■ A description of the problem, including the steps you were taking when the error occurred
Admin	<p>Opens the pages where administrators can customize the application. Appears only for those users assigned a role with administrative privileges.</p>
My Setup	<p>Opens the Personal Homepage, where you can update your personal profile and edit the page layout.</p>

Clicking this link	Does this
Deleted Items	Opens the Deleted Items page, where you can view and restore most deleted items up to 30 days after deletion.
Help	Opens online help at its top topic, displays the table of contents, and shows the Search tab to find information in the help files. From any help window, you can access the PDF version of the help content, allowing you to print a range of topics or the entire help content.
Sign Out	Exits Oracle CRM On Demand.

Additional Links

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

Clicking this link	Does this
Edit Layout	(Homepages and Detail pages only). Opens the Edit Layout page, where you can add, rearrange, or hide sections of the page you are viewing.
Help	Opens an online help topic specific to that page or procedure.
Printer Friendly	Opens the Print page, where you can print a version of data on your page. Available from all pages except Edit pages.

Oracle CRM On Demand Page-by-Page Overview

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

Homepages

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

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

List Pages

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

- Review multiple records at a glance.

- Find a record to review, delete, or update.
- Update the fields on the List page inline.
- Create new records.
- Add the list to the Favorite Lists section in the Action bar.

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

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

Manage Lists Pages

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

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

Detail Pages

The Detail pages show one record's information. The top section displays the fields for that record, and you can update these fields inline (if inline editing is enabled). The bottom sections of the Detail pages are the linked record sections where you can:

- Create other records that are linked to the selected record, such as notes or activities.
- Review already linked records.
- Edit some of the fields on records linked to the main record (if inline editing is enabled).

The head-up display might be available at the bottom of your browser window. The *head-up display* is a list of links to the related information sections of the page (such as linked records sections). For the head-up display to be visible, the head-up display functionality must be enabled.

NOTE: Each user or company administrator can enable or disable the head-up display functionality. Your personal setting overrides the company setting. For information about changing your head-up display setting, see [Updating Your Personal Details](#) (on page 604). The colors in the head-up display are determined by the theme that you are using. For more information about choosing a theme, see [Setting Your Theme](#) (on page 612).

When the head-up display is visible, you can click the links in the display to go to the related information sections without having to scroll down the page. You can collapse the head-up display by clicking the minus sign (-) in the display. To expand the display again, click the plus sign (+). This setting in the head-up display

is maintained for all record types until you change it again, even if you sign out of Oracle CRM On Demand and sign in again.

You can also remove the head-up display completely from your Detail pages, by turning off the functionality in your personal profile.

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

- Create a new record by copying the existing record (for most record types). Your company administrator determines which field values are automatically copied to the new record.
- Expand and collapse the sections in Detail pages as required. These settings are maintained until you change them again, even if you sign out of Oracle CRM On Demand and sign in again.
- Click an icon on the Detail page to add the record to the Favorite Records section in the Action bar.
- Click the Note icon to add notes or view notes from other users.
- Send a note to another user by moving the pointer over the name of the user, see [Sending Notes to Other Users](#) (on page 91).

Detail pages can also contain custom Web applets set up by your company administrator. These are used to embed Web widgets, RSS feeds, and other Web content on the page. For more information, see [About Custom Web Applets](#) (on page 1079).

Edit Pages

The Edit pages show one record's fields in editable format. You can use these pages to update the record information. The record fields on the Edit pages are identical to the top part of the Detail pages.

Both Edit pages and Detail pages can contain custom Web link fields. For a particular Web link, the administrator can specify whether it appears on the Edit page, Detail page, or both, as described in [Setting Up Web Links](#) (on page 1048).

Showing or Hiding the Action Bar

If the Action bar is available to your user role, then it appears on the left side of the Oracle CRM On Demand pages each time that you sign in to Oracle CRM On Demand. During your session in Oracle CRM On Demand, you can hide and show the Action bar as required.

NOTE: Your company administrator assigns an action bar layout to each user role. Your company administrator can also make the Action bar unavailable to your user role. If the Action bar is unavailable to your user role, you cannot show the Action bar.

The following procedures describe how to hide or show the Action bar.

To hide the Action bar

- Click the space between the Action bar and the main section of the page.

TIP: When your pointer is resting in the space between the Action bar and the main section of the page, the color of the space changes, and the Hide Action Bar tooltip appears.

To show the Action bar

- Click the space to the left of the page.

TIP: When your pointer is resting in the space to the left of the page, the color of the space changes, and the Show Action Bar tooltip appears.

My Homepage

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

- Check your schedule for appointments in the Today's Calendar section.
- Review time-sensitive alerts that inform you of deadlines, such as submitting forecasts, in the Alerts section. Alerts are set up by your company administrator.
- Scan the list of open tasks, sorted by the due date and priority (up arrow for 1-High, no arrow for 2-Medium, down arrow for 3-Low), in the Open Tasks section.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.

- Review recently created or recently modified records.

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

- Review an analysis relevant to you.

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

- View Web widgets, RSS feeds, and other Web content.

Depending on what the company administrator has set up, and what is included in your page layout, you can view embedded Web content on My Homepage. This Web content might include Web widgets, such as Google maps or corporate videos, and RSS feeds. For more information about how external Web content is set up, see [About Custom Web Applets](#) (on page 1079).

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

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

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

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

To do this	Follow these steps
Tasks	
Create a task	In the Open Tasks section, click New. On the Task Edit page, fill in the required information and save the record.
Review a task record	In the Open Tasks section, click the Subject link of the task you want to review. The Task Detail page appears.

Reviewing Your Alerts

Company-wide alerts appear on My Homepage. Company administrators use alerts to broadcast company-wide information, such as meeting notices and policy changes. If you are a sales representative whose information is included in your company's sales forecasts, you will receive an alert when the forecast has been generated as well.

To review your alerts

- 7 Click the Home tab.
- 8 In the Alerts section, you can:
 - Click the link for the alert you want to review, if it currently appears on My Homepage.
The Alerts page opens with additional alert information about that alert.
 - Click the Show Full List link.
The Alerts (List) page opens where you can select an alert, select an option from the drop-down list to limit the types of alert records you see, or create your own filtered list for alerts.

Related Topics

See the following topics for related information:

- [Alert Fields](#) (on page 1020)
- [Working with Lists](#) (on page 69)

Working with the Message Center

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

The Message Center can contain:

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

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

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

From the list of notes you can do the following:

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

You can embed the Message Center as a Web widget in other applications. For more information, see [Embedding a Message Center Widget](#) (on page 625).

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

Working with RSS Feed Applets

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

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

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

- My HomePage
- Record type homepages
- Record type Detail pages
- The Action bar

For more information about custom Web applets, see [About Custom Web Applets](#) (on page 1079).

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

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

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

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

To configure an RSS feed applet

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

The feed is refreshed with data from the configured URL.

Note: You can click [Use Default](#) to return to the URL as defined by the company administrator.

Working with Records

This section describes common procedures you can do with most records. Click on the topic to see step-by-step instructions to do the following:

- [Creating Records](#) (on page 38)
- [Finding Records](#) (on page 41)
- [Previewing Records](#) (on page 59)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Updating Linked Records from Main Records](#) (on page 67)
- [Working with Lists](#) (on page 69)
- [Creating and Refining Lists](#) (on page 73)
- [Exporting Records in Lists](#) (on page 81)
- [Transferring Ownership of Records](#) (on page 83)
- [Updating Groups of Records](#) (on page 85)
- [Merging Records](#) (on page 86)
- [Adding Notes](#) (on page 87)
- [Attaching Files and URLs to Records](#) (on page 94)
- [Deleting and Restoring Records](#) (on page 100)
- [Printing Information That Appears on Pages](#) (on page 111)

Related Topics

See the following topic for related information:

- [Import and Export Tools](#) (on page 1282)

Creating Records

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

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

You can also create new records in the following ways:

- By importing records:

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

The type of records you can import depends on the privileges assigned to your user role. For more information on how to import records from external CSV files and other external sources, see [Import and Export Tools](#) (on page 1282).

- By converting lead records. Based on the options that you select on the Convert Lead page, you can create one or more of the following by converting a lead record:

- An account record
- A contact record
- An opportunity record

For more information about converting leads, see [Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities](#) (on page 166).

- By converting deal registration records. Based on the options that you select on the Convert Deal Registration page, you can create one or more of the following by converting a deal registration record:

- An account record
- A contact record
- An opportunity record

For more information about converting deal registrations, see [Converting Deal Registrations to Accounts, Contacts, or Opportunities](#) (on page 345)

TIP: To prevent record duplication, search for the record before creating a new one, see [Finding Records](#) (on page 41).

NOTE: An asterisk (*) beside a field name indicates that this is a required field.

To create a record using the Create section

- 1 From any page, go to the Create section in the Action bar.
- 2 From the list, click the link for the record type.
- 3 In the New record form, fill in the record information.
- 4 Save the record.

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

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

- 3 Save the record.

To create a record that is linked to the selected record

- 1 Select the record.
For instructions on selecting a record, see [Finding Records](#) (on page 41).
- 2 On the record Detail page, scroll down to the appropriate section.
- 3 On the title bar for that section, click the New or Add button.
- 4 On the Edit page, fill in the record information.
- 5 Save the record.

Entering Information in Records

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

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

About Multi-select Picklists

A multi-select picklist is a picklist from which you can select multiple values. When you click the Lookup icon for a multi-select picklist, a pop-up window appears, which allows you to select the required values by moving values from an Available list to a Selected list. You can also sort the values in the Selected list.

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

- Account
- Activity
- Contact
- Custom Object 01
- Custom Object 02
- Lead
- Opportunity
- Partner

■ Service Request

About Phone Number Fields

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

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

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

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

For example, if the Locale setting on your user record is English - United States, the plus symbol represents the 011 international access code. If the Locale setting on your user record is French - France, the plus symbol represents the 00 international access code.

- The country calling code for the country that you selected for the phone number.

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

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

About Address Fields

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

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

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

Finding Records

You can find a specific record, such as an account, contact, or opportunity, by using any of these methods:

- **Search section in the Action bar**

The Search section, located in the top left corner, is a quick way to find a record that already exists. You can use the Search section to perform a search for most record types. Before creating a new account, contact, and so on, it is a good idea to determine if it already exists.

■ Alpha Search or Quick Filter on list pages for the record type

All record types have a list page where you can view a subset of records or sort records.

■ Lookup windows for some fields

When entering record information, you might see the Lookup icon next to a field. This indicates that you can select an existing record to fill in the field rather than type in the information. In the Lookup window, the records are displayed as a list, and you can use the Alpha Search or Quick Filter where available.

Using the Search Section to Find Records

In the first field in the Search section in the Action bar, you can select the record type that you want to search. You can select All to search all record types or alternatively you can select an individual record type. You can set the default record type for the Search section. For more information, see [Setting Your Default Search Record Type](#) (on page 612).

If you search a single record type, the search results are displayed in a List page, and you can then work with the list of records. The number of fields (columns) displayed in the list is determined by the search layout that your company administrator has defined for your role and the record type. You can further refine the list using the list management features of Oracle CRM On Demand, and you can save search results as a new list. For more information about managing lists of records, see [Working with Lists](#) (on page 69).

If you search all record types, a Search Results page is displayed with different sections for each type of record found in the search.

When you search using text-based search fields, the searches are case insensitive unless the text *case-sensitive* appears grayed out in the input field. The grayed-out text disappears when you click the field.

The Search section in the Action bar also contains a link to the Advanced Search page, which allows you to search several record types at once and to search using date fields. Advanced search also provides better filtering capabilities. For more information, see [Using Advanced Search](#) (on page 46).

Oracle CRM On Demand supports two types of search: targeted search and keyword search. Your company administrator determines the type of search. In general, targeted search provides better query performance.

NOTE: For targeted search only, a Book selector might be displayed in the Search section in the Action bar. You can use the Book selector to narrow the search so that only the records belonging to a particular user book (typically referred to as a user) or custom book (typically referred to as a book) are searched. For more information, see [Using the Book Selector](#) (on page 57).

About Targeted Search

If your company administrator selects targeted search as the default search type for your company, you see multiple search fields in the Search section of the Action bar. The fields that you see are determined by the record type selected in the record-type picklist and the search layouts that your company administrator sets up for each record type. Targeted search returns records where the values you specify in the search fields match the corresponding values in records of the record type that you selected. It displays only those records where a match is found for each of the values you entered, which is equivalent to using an AND condition between the search fields. If you leave a search field blank, that field is not considered in the search.

NOTE: You cannot specify a null value in a field in a search from the Action bar. To specify a null value, you must use Advanced Search. For more information, see [Using Advanced Search \(on page 46\)](#).

About Wildcards in Targeted Search

By default, every search value entered in a targeted search field is appended with a wildcard or asterisk sign (*) so you do not need to append a wildcard to your search string. You can prefix your search values with a wildcard, or you can use a wildcard between the search values. You cannot use the wildcard in picklists where values are predetermined.

For example, in a targeted search of account records, the default search layout allows you to enter search strings for the Account Name field and the Location field. Both of these fields are case-insensitive. If you enter *C* in the Account Name field, and *Head* in the Location field, the targeted search expression is interpreted as follows:

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

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

NOTE: Using the wildcard impacts search performance, and searches where a search value is prefixed with a wildcard are the slowest.

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

Searching for Exact Matches

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

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

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

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

- If you explicitly use a wildcard in the search string, the wildcard is treated as text.

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

- If the field value in a record starts with an equal sign, only the second equal sign that you enter in the search field is treated as part of the search string.

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

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

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

About Keyword Search

If your company administrator selects keyword search as the search type for your company, you see only one search field in the Search section in the Action bar. A keyword search searches certain fields to find matches to the text that you enter in the search field. It displays all records where the text string you entered is found in any of the searched fields, which is equivalent to using an OR condition on the default fields.

For example, in a keyword search of service request records, the Service Number field and the Subject field are searched. If you enter the value *1234* in the search field in the Action bar, the records displayed include the following:

- All records where the value in the Service Number field includes the string *1234*, such as service requests number 12345 and 01234.
- All records where the text in the Subject field includes the string *1234*, such as *Customer reported a problem with product number 1234*.

Some record types do not support keyword search. For a list of the record types that support keyword search and for details about the fields that are searched for each record type in a keyword search, see [Default Search Fields for Keyword Search](#) (on page 50).

The following procedure describes how to find a record using the Search section of the Action bar.

To find a record using the Search section

- 1 From any page, go to the Search section in the top left corner.
- 2 To search all record types or to narrow the search to just a single record type:
 - a From the drop-down list, select All (for a slower query) or a record type (for a faster query).
 - b Depending on your setup, you can enter the value to search for in either a single text field or in several text fields.
 - c Click Go.

NOTE: When you select the All option in the drop-down list of record types, Custom Object 01, 02, and 03 record types are included in the search, but other Custom Object record types are not included.

TIP: If a message appears indicating that your search request has timed out, you can use Advanced Search to refine your criteria further. For more information, see [Using Advanced Search](#) (on page 46). You can also find more information about optimizing searches and lists on the Training and Support Web site. To access the Training and Support Web site, click the Training and Support link at the top of the Oracle CRM On Demand page.

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

This opens the Detail page for that record.

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Finding a Record from the List Page

Use the following procedure to find records in a list page. For more information about finding records in a list page, see [Filtering Lists](#) (on page 77).

To find a record in the List page

- 1 Click the tab for the type of record that you want to find.
- 2 On the record Homepage, select the filtered list that would include the record that you are trying to find.
You can also go to the required list from the Favorite Lists section in the Action bar if it is available there.
- 3 On the List page, you can:
 - Use an Alpha Search to find the record.
 - Use a Quick Filter Search to find the record.
 - Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
- 4 Click the link in the record that you want to work on.
The Detail page for that record is displayed.

Using the Lookup Window to Find Records

When entering record information, if you click the Lookup icon next to a field, a Lookup window appears in which you can search for and select records. In some cases, you can select only one record. In other cases, you can select multiple records. When you select a record, an association is automatically created with the main record that you are creating. In cases where you can select only one record, the association is a single association. In cases where you can select multiple records, the association is a multiple association. After you select a record, the name of the associated record is displayed in the field.

The appearance of the Lookup window depends on whether there is a single association or a multiple association. If there is a single association, one list of records is displayed and you can select a single record. If there is a multiple association, two lists are displayed, a list of available records and a list of selected records.

The appearance of the Lookup window also depends on whether keyword search or targeted search (the recommended search method) is enabled for your company:

- **If keyword search is enabled.** A single text field is displayed, and you can enter search criteria and press Enter, or click Go to refine the list of records.
- **If targeted search is enabled.** Quick Filter search fields are displayed to the right of the Show results where label. You can enter search criteria, and press Enter, or click Go to refine the list of records. An Advanced link and a Book selector are also displayed.

In the Lookup window, a Book selector might be displayed, which allows you to narrow the search to the records belonging to a particular user or book. For more information, see [Using the Book Selector](#) (on page 57).

Depending on the record type, there might be an additional list in the top left-hand corner of the window. For example, in the Task Edit page, if you select a valid value in the Account field and you open the Lookup window for the Primary Contact field, there is a list with two values: Contacts for Related Account and All Contacts. When you click the Go button, the value you select in the drop-down list is used in refining the list of records.

To search for records using the Lookup window

- 1 Click the Lookup icon next to the field.
- 2 The Lookup window appears containing a list of the available records.

In the Lookup window, you can:

- If targeted search is enabled, use a Quick Filter Search to filter the list, see [Filtering Lists](#) (on page 77).
- If targeted search is enabled, click the Advanced link to filter the list, this is similar to [Using Advanced Search](#) (on page 46).
- For some record types, click New to create a new record, which will be added to the list.
- Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.

- 3 Click the Select link to select the records you require and click OK.

In cases where you can select more than one record, click Select for each record that you require. The records are moved from the Available Records list to the Selected Records list.

NOTE: In the Lookup window, click Clear Current Value to remove already-selected information and leave the field blank. The Clear Current Value button is not available if Smart Associations is turned on.

Using Advanced Search

You can use advanced search to:

- Search one or more record types at once
- Search for records using date search fields
- Search using filter criteria for each field

The sections available in the Advanced Search page change according to whether you select a single record type or multiple record types for your search.

About Advanced Searches of Single Record Types

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

- Select any of the fields that are visible to your user role as search fields

- Enter the conditions, filter values, and operators (AND, OR) that define the filter
- Specify which fields to display in the search result

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

When you use advanced search to search a single record type, your user role determines which fields you can search and which fields you can view in the records returned by the search, as follows:

- If the All Fields in Search and Lists privilege is enabled for your user role, then you can search all fields and view all fields in the returned records.

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

- If the All Fields in Search and Lists privilege is not enabled on your user role, then you can search and view only the fields that are displayed on the Detail page layout that is assigned to your user role for a given record type. If your company administrator has defined dynamic page layouts for the record type for your user role, then you can search and view all of the fields that are displayed on the various dynamic page layouts assigned to your user role.

NOTE: *Dynamic layouts* are page layouts that show different sets of fields for different records of the same record type, depending on the picklist value that you select in a certain field on the record.

When you use advanced search to search a single record type, the search results are displayed in a List page, and you can then work with the list of records. For more information about managing lists of records, see [Working with Lists](#) (on page 69).

About Advanced Searches of Multiple Record Types

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

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

For more information about keyword search, see [Finding Records](#) (on page 41).

To perform an advanced search of a single record type

- 1 In the Action bar, in the Search section, click Advanced.
- 2 In the Advanced Search page, do the following:
 - a Select the Following Record Types radio button.
 - b Select the check box for the record type that you want to search.
 - c Make sure that the check boxes for all other record types are not selected.

3 In the Search In section, select one of the following options:

- Record Set
- Book

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

4 In the Search In section, if you select the Record Set option, then select one of the following to specify the set of records you want to search:

- **All records I can see.** Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role, and the access level for shared records.
- **All records I own.**
- **All records where I am on the team.** Includes only records in the filtered list where one of the following applies:
 - You own the records.
 - The records are shared with you by the owner through the Team feature.
 - The records are shared with you through the group assignment feature for accounts, activities, contacts, households, opportunities, and portfolios.
- **All records I or my subordinates own.** Includes records that your subordinates own if Manager Visibility is enabled on the company profile. If Manager Visibility is not enabled on the company profile, then this option includes only records that you own.
- **All records where I or my subordinates are on the team.** Includes records where your subordinates are on the team, if Manager Visibility is enabled on the company profile. If Manager Visibility is not enabled on the company profile, this option includes only records where you are on the team.
- **My Default Book.** Your default setting for the Book selector, as defined by your company administrator.

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

For more information, see [Using the Book Selector](#) (on page 57).

6 In the Choose Case Sensitivity section, select the Case Insensitive check box if required.

If this check box is selected, the fields where the search is case-insensitive are shown in blue in the Enter Search Criteria section.

7 In the Enter Search Criteria section do the following:

- a** Select a field from the Field list.

The fields are pre-populated with the targeted search fields for the record type.

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

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

For information about using filter conditions, see [About Filter Conditions](#) (on page 51).

CAUTION: When entering Filter Values, check to make sure you follow the rules described in [About Filter Values](#) (on page 56). Otherwise, you might not find the correct records.

Examples

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

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

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

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

- 8** Click Go.

To perform an advanced search of multiple record types

- 1 In the Action bar, in the Search section, click Advanced.
- 2 In the Advanced Search page, select the option you want, as follows:
 - Select the All Record Types option to search all of the record types that support keyword search. This query is slower.
 - Select the Following Record Types option, and then select the check box for each of the record types that you want to search.
- 3 In the Keywords field, enter the value that you want to search for or leave the Keywords field blank to search only on the basis of the dates that you provide.

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

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

5 Click Go.

The results appear for each record type.

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

Default Search Fields for Keyword Search

Oracle CRM On Demand supports two types of search in the Search section of the Action bar, targeted search and keyword search. Your company administrator determines which type of search is available in the Search section of the Action bar for your company.

In the Advanced Search page in Oracle CRM On Demand, the type of search depends on the options you select, as follows:

- If you search multiple record types, then the search is a keyword search.
- If you search a single record type, then the search is similar to a targeted search in the Search section of the Action bar.

For more information about keyword search and targeted search, see [Finding Records](#) (on page 41). For more information about advanced searches, see [Using Advanced Search](#) (on page 46).

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

For this record type	These fields are searched
Accounts	Account Name, Location
Appointments	Subject
Campaigns	Source Code, Campaign Name
Contacts	Last Name, First Name, Email
Custom Objects 01	Name, Quick Search 1, Quick Search 2
Custom Objects 02	Name, Quick Search 1, Quick Search 2
Custom Objects 03	Name, Quick Search 1, Quick Search 2
Leads	Last Name, First Name
Opportunities	Opportunity Name
Products	Product Name, Product Category, Status
Service Requests	SR Number, Subject
Solutions	Solution ID, Title
Tasks	Subject

For this record type	These fields are searched
Users	Last Name, First Name, Email
Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition	
Funds	Fund Name, Status
Fund Requests	Fund Request Name, Status
Specific to Oracle CRM On Demand Partner Relationship Management Edition	
Partners	Partner Name, Location
Specific to Oracle CRM On Demand Automotive Edition	
Dealer	Name, Site
Vehicles	VIN
Specific to Oracle CRM On Demand Life Sciences Edition	
MedEd Events	Name, Location
Specific to Oracle CRM On Demand Financial Services Edition	
Households	Household Name
Portfolios	Account Number

About Filter Conditions

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

Data Type	Filter Conditions Available
Number, Integer, Percent, Currency	<ul style="list-style-type: none"> ■ Between ■ Equal to ■ Greater than ■ Less than ■ Is NULL ■ Is not NULL ■ Not equal to ■ Not Between

Data Type	Filter Conditions Available
Date, Time	<ul style="list-style-type: none"> ■ Between ■ Equal to ■ In the last 90 days ■ In the next 90 days ■ On ■ On or after ■ On or before ■ Today * ■ Yesterday* ■ Tomorrow* ■ In the last ? day ■ In the next ? day ■ Last Week* ■ Next Week* ■ This Week* ■ Last Month* ■ Next Month* ■ This Month* ■ This Quarter* ■ Last Quarter* ■ Next Quarter* ■ This Year* ■ Next Year* ■ Last Year* ■ Is NULL* ■ Is Not NULL* ■ Not equal to ■ Not Between <p>For conditions marked with an asterisk (*), the value field is disabled when the condition is selected.</p> <p>For the condition In the last ? day, and In the next ? day, the variable ? is substituted with a number of days selected</p>

Data Type	Filter Conditions Available
	in the filter value field.
Checkbox	<ul style="list-style-type: none">■ Is checked■ Is not checked
Picklist	<ul style="list-style-type: none">■ Contains all values■ Contains at least one value■ Contains none of the values■ Equal to■ Is NULL■ Is not NULL■ Not equal to

Data Type	Filter Conditions Available
Text	<ul style="list-style-type: none">BetweenContains all valuesContains at least one valueContains none of the valuesEqual toGreater thanLess thanIs NULLIs not NULLNot equal toBegins withDoes not begin withIs LikeIs not LikeNot Between
Phone	<ul style="list-style-type: none">Begins withBetweenContains all valuesContains at least one valueContains none of the valuesEqual toGreater thanLess thanNot equal to

How Filter Conditions Are Used

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

Use This	With	To Match	For These Results
Between	Numbers or dates	Two values separated by commas	Displays records with values between A and B (excludes values equal to A and B).

Use This	With	To Match	For These Results
Contains all values (equal to)	Text, numbers, or dates	Single or multiple values separated by commas	Displays records matching the exact values. The application does not retrieve substrings of the values, or the same value with different capitalization (uppercase or lowercase).
Contains at least one value	Text only	Single or multiple values separated by commas	<p>Displays records that partially match the values (allows substring matching). For example, entering <i>Brown</i> retrieves records with <i>Browns Trucking</i>, <i>Browning Equipment</i>, and <i>Lester Brown Car Wash</i>.</p> <p>NOTE: This behavior applies to filtered lists only, and not to other areas in Oracle CRM On Demand that use the condition, <i>Contains At Least One Value</i>.</p> <p>Also, using this condition affects the speed at which the records are retrieved, because Oracle CRM On Demand looks for partial matches.</p>
Contains none of the values (not equal to)	Text, numbers, or dates	Single or multiple values separated by commas	Displays records <i>not</i> matching the values. This is the inverse of <i>Contains all values</i> .
Equal to	Text, numbers, or dates	Single value for each line. To add values, use the operator OR and add another line.	Displays records matching the values.
Greater than	Numbers or dates	Single value	Retrieves records with a value greater than the entered value.
Less than	Numbers or dates	Single value	Retrieves records containing a value less than the entered value
<i>Operator</i>			
AND	Text, numbers, or dates	Two or more conditions	<p>Displays records for which all given conditions are true.</p> <p>For example, entering Close Date > 10/01/2003 AND Revenue > 500000 will return records that match <i>both</i> criteria.</p>

Use This	With	To Match	For These Results
OR	Text, numbers, or dates	Any condition	Displays records for which at least one condition is true. For example, entering Industry = Energy OR Billing State=CA returns records that match <i>either</i> of these criteria.

About Filter Values

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

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

- Use commas to separate values in a list of values with any of the following conditions:

- Contains all values
- Contains at least one value
- Contains none of the values

- Do not use a comma within a value with any of the following conditions:

- Contains all values
- Contains at least one value
- Contains none of the values

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

- For numeric values, do not use commas to indicate values in thousands.
- You can use partial words with the Contains at least one value condition. However, using partial words with the other conditions does not retrieve the records that you want.

NOTE: This behavior applies to filtered lists that use the Contains at least one value condition and not to other areas in Oracle CRM On Demand.

- For dates, enter them in the format that your company uses but include four digits for the year, such as 2003.
- For currency, omit commas and symbols, such as the dollar sign (\$).

Using Wildcards with Filter Values

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

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

You can use wildcards in the following types of search:

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

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

About Searching on Multi-Select Picklists

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

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

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

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

Using the Book Selector

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

The Book selector is displayed in:

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

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

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

For information about which record types are supported for books, see [Book Management](#) (on page 1177).

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

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

When you select a book, and sub-books for the book are displayed in the hierarchy, all of the sub-books are included in the search.

CAUTION: For optimal performance, include sub-books only when absolutely necessary.

Each user has a set of default books. If you select All, all of the books applicable to you and your subordinates (if any) are selected.

Within the User hierarchy you can choose users that have delegated their access to you or users in your organization.

After you select a book or user, and click OK, the name of the book or user is displayed in the Book selector. The plus sign (+) indicates that children in the hierarchy are also selected.

You can use the Include Sub-Items check box to control whether sub-books or subordinates are included in the respective hierarchy.

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

Copying Records

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

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

The following procedure describes how to copy a record.

To copy a record

- 1 Find the record that you want to copy.

For information on finding records, see [Finding Records](#) (on page 41).

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

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

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

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

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

- 5 Save the new record.

Previewing Records

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

- My Homepage
- Record Homepages
- Record List pages
- Record Detail pages (including lists of related records)
- Action bar

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

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

For information about setting your record preview mode, see [Setting Your Record Preview Mode](#) (on page 613). For more information about setting the record preview mode at company level, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).

To preview a record

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

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

To close the record preview window

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

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

Updating Record Details

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

Also, for solution records, your user role must include the Publish Solutions privilege.

You can update records in the following ways:

- By editing fields inline on the List and Detail pages.

Your company administrator can enable or disable inline editing in the company profile. By default, inline editing is enabled.

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

- By updating the record in the Edit page.

You can reach the Edit page by clicking the Edit link for a record in the List page, or clicking the Edit button for a record in the Detail page.

- By importing records:

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

The type of records that you can import depends on the privileges assigned to your user role. For more information on how to import records from external CSV files and other external sources, see [Import and Export Tools](#) (on page 1282).

You can also edit fields in linked records on the Detail page of the main record (if inline editing is enabled). For more information on updating fields in linked records, see [Updating Linked Records from Main Records](#) (on page 67).

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

The following procedure describes how to update fields inline on list pages, related information sections, and record detail pages. To allow you to update fields inline, inline editing must be enabled.

To update fields inline

- 1 On the record full List page, or record Detail page, move the pointer over the field that you want to update

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

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

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

- 3 Update the value of the field.
- 4 Click the green check mark icon or press Enter to save the changes.
To cancel changes, click the red X icon, or press Esc.

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

To update record details in an Edit page

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

Linking Records to Your Selected Record

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

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

About Single and Multiple Associations

There can be single or multiple associations between records. For example, if your company administrator has enabled multiple associations, you might link multiple contacts with a task, as you are creating or editing the task. On the Task Edit screen, when you click the Lookup icon on a Contact fields, the Lookup window is pre-filled with contacts associated with the account that was specified for the task. You can then select one or more contacts in this Lookup window to associate those contacts with the task. This capability is not available for all associations; it only exists for certain configured association controls. For example, if the Account field in a Task record has a valid value, and you click the Lookup icon for Opportunities, the window is not pre-filled with records, but you can select a list of opportunities from the drop-down list.

Automatic Resolution of Field Values

When you are searching for records, and where there is a single association, you can type in the name of the associated record and the application automatically attempts to resolve the association. For example, when creating a task, you can type in the account name field. When you save the field, the application automatically searches for accounts that match. If a unique match is found, the appropriate account is used. If no matches or multiple potential matches are found, you are presented with a Lookup window where you can perform additional searches, and select the appropriate account.

Linking Records from the Detail Page

From a record Detail page, the application lets you do one of the following:

- Link (associate) an existing record or records.
- Create a new record that is automatically linked to the main record.

New records are added to the database at the same time that they are linked to the selected record. For example, an activity you create from the Lead Detail page is linked to the lead, and then appears in the Activities pages.

NOTE: You can also edit some fields on linked records from the main record Detail page (if inline editing is enabled). For information about editing linked records from the main records, see [Updating Linked Records from Main Records](#) (on page 67).

To link an existing record to your selected record

- 1 Select the main record (the record that you want to link new records to).
For more information about selecting records, see [Finding Records](#) (on page 41).
- 2 On the record Detail page, scroll down to the appropriate section, and click Add.
- 3 Click the Lookup icon next to the field.
- 4 The Lookup window appears containing a list of the available records.
- 5 In the Lookup window, you can:
 - Use a Quick Filter search to filter the list, see [Filtering Lists](#) (on page 77).
 - Click the Advanced link to filter the list, which is similar to [Using Advanced Search](#) (on page 46).
 - Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
 - Click New to create a new record, which will be added to the list.
- 6 Click the Select link to select the records you require, and click OK.
In cases where you can select more than one record, click Select for each record that you require. The records are moved from the Available Records list to the Selected Records list.
The selected record or records appear appears in the Detail page.

To create a new record and link it to your selected record

- 1 Select the main record (the record that you want to link new records to).
For more information about selecting records, see [Finding Records](#) (on page 41).
- 2 On the record Detail page, scroll down to the appropriate section, and click New.
- 3 In the Edit page, create a new record that is linked to the main record.

To remove or delete a linked record

- 1 Select the main record.
For more information about selecting records, see [Finding Records](#) (on page 41).
- 2 On the record Detail page, scroll down to the appropriate section.
- 3 In the row whose link you want to remove or delete, select one of the following options from the record-level menu:
 - **Remove.** This option disassociates the records without deleting either of the records.
 - **Delete.** This option deletes the linked record. A deleted record is moved to the Deleted Items page and is permanently removed from the database after 30 days.

Examples of Record Types Linked to Other Record Types

The following table shows some examples of record types that you can link to other records in Oracle CRM On Demand. In the Information column, instructions on how to link the record type from the Details page of the main record are given.

The record types that you can link to your selected record depend on the type of record you are working with, as well as the customization that you or your managers have made to Oracle CRM On Demand. In addition, if you are working in a particular edition of Oracle CRM On Demand, such as Oracle CRM On Demand for Partner Relationship Management or an industry-specific edition of Oracle CRM On Demand, you can link additional record types.

Record Type	Information
Account	<p>In the standard application, the Accounts section is available on the Detail pages for contact records. You might need to add the section to your layout:</p> <p>To link an existing account and track the role it plays in relation to the contact, click Add. On the Add Account page, select an account, select the role it plays for this contact, and click Save. If the account you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Account Fields (on page 192).</p> <p>If the account has more than one role, click Edit Roles in the appropriate row, select the roles, and save the record.</p>

Record Type	Information
Account Partners	<p>In the standard application, the Account Partners section appears on the Detail pages for account records. You might need to add the section to your layout:</p> <p>To link an account and track it as your partner for this record, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (on page 185).</p>
Account Relationships	See Tracking Relationships Between Accounts (on page 187).
Account Team	See Sharing Records (Teams) (on page 84).
Campaigns	<p>From contact records only:</p> <p>To link a campaign, click Add, select the campaign, and save the record. For field descriptions, see Campaign Fields (on page 154).</p>
Competitors	<p>In the standard application, the Competitors section appears on the Detail pages for account and opportunity records:</p> <p>To link an account and track it as your competitor for this record, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (on page 185).</p>

Record Type	Information
Contacts	<p>In the standard application, the Contacts section is available for activity records (tasks and appointments). You might need to add it to your layout:</p> <p>To link the Primary Contact, click Edit and link the contact. To link additional contacts to the activity, scroll down to the Contacts section, click Add, and link the contact records.</p> <p>In the standard application, the Contacts section appears on the Detail pages for account records:</p> <p>To link a new contact, click New, enter the required information in the Edit form, and save the record.</p> <p>To link an existing contact, click Add. On the Contact List page, select a contact and click Save. If the contact you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Contact Fields (on page 206).</p> <p>In the standard application, the Contacts section appears on the Detail pages for opportunity records:</p> <p>To link an existing contact to your opportunity record, click Add. In the Contact List form, select a contact, define the contact's Buying Role, and click Save. If the contact you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Contact Fields (on page 206).</p> <p>You must select a Buying Role to clarify a contact's responsibilities within a company, and the contact's influence on purchasing decisions. The Buying Role is critical for Key Role Analysis and for understanding the selling political environment.</p> <p>NOTE: You can link the same contact to several opportunities or several contacts to the same opportunity.</p>
Contact Relationships	See Tracking Relationships Between Contacts (on page 202).
Contact Team	<p>From contact records only:</p> <p>To allow the contact record to be visible to other employees, click Add Users. In the Contact Team Add User window, select the user's name and the user's access rights for the record (in the Contact Access field), and then save your changes. For more information on sharing records, see Sharing Records (Teams) (on page 84).</p>
Leads	<p>In the standard application, the Leads section appears on the Detail pages for campaign records:</p> <p>To link a new lead, click New, enter the required information in the Lead Edit form, and save the record. For field descriptions, see Leads Fields (on page 170).</p>

Record Type	Information
Notes	<p>In the standard application, the Notes section appears on the Detail pages for record types that support the notes feature:</p> <p>To link a new note, click New, enter the required information in the record Note form, and save the record. For field descriptions, see Adding Notes (on page 87).</p>
Open Activities	<p>In the standard application, this section appears on the Detail pages for most records:</p> <p>To link a new appointment or task, click New Appt or New Task in the title bar. Then enter the required information in the Edit form and save the record. For field descriptions, see Activity Fields (on page 143).</p> <p>You can link several activities to your selected record. If an activity has a time associated with it, the activity appears in the Activities list and Calendar.</p> <p>Users that can view the selected record can also see the Activities linked to the record, including those activities owned by or assigned to others. For information about working with lists of activities, see Working with Activity Lists (on page 121).</p>
Opportunities	<p>To link a new opportunity, click New, enter the required information in the Opportunity Edit form, and save the record. For field descriptions, see Opportunity Fields (on page 226).</p> <p>NOTE: To link an opportunity to a lead, convert the lead that is associated with the campaign to an opportunity. For more information, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 166).</p>
Opportunity Partners	<p>In the standard application, the Opportunity Partners section appears on the Detail pages for opportunity records:</p> <p>To link an account and track it as your partner for this record, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Opportunities (on page 214).</p>
Referral	See Adding Referrals (on page 204).
Related Solutions	<p>In the standard application, the Related Solutions section appears on the Detail pages for solution records:</p> <p>To add a solution, click Add Solution and select an existing solution in the Lookup window. You can add as many solutions as you like. You may want to link solutions to each other if they share related information or are about a related topic. To create a new solution, click New, fill in the required information, and save the record.</p> <p>NOTE: You can review linked service requests from the Solution Detail page, but you must link them from the Service Request Detail page.</p>

Record Type	Information
Service Requests	<p>In the standard application, the Service Requests section appears on the Detail pages for account and contact records:</p> <p>To link a new service request, click New, enter the required information in the Service Request Edit form, and save the record. For field descriptions, see Service Request Fields (on page 276).</p>
Solutions	<p>In the standard application, the Solutions section appears on the Detail pages for service request records:</p> <p>To link a solution, click Add. In the Lookup window, you can click the Solution ID link to link an existing solution or click New to create a new solution. For field descriptions, see Solution Fields (on page 284).</p> <p>TIP: Before creating new solutions, check the Solution List page to make sure the solution is not waiting for your manager to publish it. The Lookup window shows only solutions marked Published with a status of Approved.</p>
Team	<p>The Team section does not appear by default on any record detail page in the standard application, but your company administrator can add the Team section to certain record types:</p> <p>To allow this record to be visible to other employees, click Add Users. In the Team Add Users window, select the user's name.</p> <p>NOTE: If the record owner is part of a Group, (defined by your company administrator), the group members automatically appear in the Team Related Information section.</p> <p>For more information, see Sharing Records (Teams) (on page 84).</p>
User	<p>The User section does not appear by default on any record detail page in the standard application, but your company administrator can add the User section to certain record types:</p> <p>To track another employee involved in a task, in the Users section of the Task Details page, click Add. In the Lookup window, select the user.</p> <p>NOTE: Unlike the Team feature, if the record owner is part of a Group (defined by your company administrator), the group members do not automatically appear in the User Related Information section. The User list does not affect visibility to records; it is used strictly for tracking.</p>

Updating Linked Records from Main Records

You can update fields in a linked record from the main record as follows:

- By editing fields on the linked record on the Detail page of the main record (if inline editing is enabled).

In most cases, you can edit fields in linked records from the Detail page of the main record. However, you cannot edit the following types of fields in linked records from the Detail page of the main record:

- Fields that are not shown in the Detail page of the linked record itself
- Calculated fields, for example, Full Name
- Fields that are read-only on the Edit page of the linked record

Also, in cases where the same linked record can show up under multiple main records, the fields that are part of the relationship can be edited. However, the fields that belong to the linked record itself cannot be edited. For example, in the Account Team related list on an account record, the Team Role field can be edited, because the field is part of the relationship between the account and the team member. However, the Last Name and First Name fields cannot be edited, because they belong to the user record (of the team member).

- By opening the Edit page for a linked record from the Detail page of the main record, and updating fields on that page.

The following procedure describes how to update a linked record on the main record Detail page.

To update a linked record on the main record Detail page

- On the Detail page of the main record, scroll down to the appropriate section, and edit the fields as necessary.

NOTE: If the record that you want to edit is not displayed on the page, click the Show Full List link to see all of the linked records of that type, and then edit the record fields in the List page.

For more information on editing fields inline, see [Updating Record Details](#) (on page 60).

The following procedure describes how to open a linked record from the main record Detail page.

To open a linked record from the main record Detail page

- 1 On the Detail page of the main record, scroll down to the appropriate section.
- 2 Click the Edit link for the record (if one is provided), or click the name link of the linked record.

NOTE: If the record that you want to edit is not displayed on the page, click the Show Full List link to see all of the linked records of that type.

- 3 When the Edit or Detail page for the linked record opens, update the record details.

For more information on updating record details, see [Updating Record Details](#) (on page 60).

Favorite Records Page

The Favorite Records page shows your favorite records. You access the Favorite Records page by clicking Show Full List in the Favorite Records section of the Action bar. From the Favorite Records page, you can perform the tasks shown in the following table.

To do this	Follow these steps
Change the sequence of the records	In the Favorite Records title bar, click the Manage Favorites button. On the Manage Favorites page, change the order of the records until it reflects the sequence that you want. The records then appear in the new sequence on the Action bar and the Favorite Records page.
Delete a record from the list of favorites	In the row for the record that you want to delete, click the Delete link.
Display details of a record	Click the name of the record to display the Detail page for the record.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed in the drop-down list at the bottom of the page, select a number of records to see at once.

Working with Lists

You can limit the records you see by creating filtered lists for many record types. A filtered list shows a subset of the records that meet the criteria making up the list.

Oracle CRM On Demand provides standard filtered lists for many record types, which appear on the record Homepage. Custom lists that you or your managers create are added to that List section.

When you select a filtered list, the list of records that meet the list criteria opens in the record List page. You can choose to display the first 25, 50, 75, or 100 records in the page at one time. The option you choose is maintained in the List pages for all record types, until you change it again. When you browse a list, the record on which your pointer is resting is highlighted by a change in the background color.

If there are more records in the list than can be shown on one page, then the following occurs:

- You can click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
- The last page in the list shows a full page of records, and the number of records shown on the last page in the list is determined by the number of records you choose to display in your list page. As a result, some of the records that appear on the last page of the list might also appear on the second from last page.

For example, assume that a list has a total of 40 records, and you choose to display 25 records in your list page. The records are displayed over two list pages. The first page of the list shows the first 25 records, while the last page of the list shows the last 25 records in the list. In this example, 10 of the records in the list appear on both the first page and the last page of the list.

From the List pages, you can do the following:

- Sort the records.
- Review multiple records at a glance.
- Find a record to review, delete, or update.
- Update the fields on the List page inline.

- Create new records.

NOTE: For performance reasons, some custom fields cannot be used to sort lists.

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

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

You can filter the list further if there are too many records on the page. For more information about quick ways of filtering your lists, see [Filtering Lists](#) (on page 77). You can also add the list to the Favorite Lists in the Action bar by clicking the Favorites icon.

Each filtered list is specific to the record type, such as Opportunities or Accounts. All employees can create filtered lists for their own use, but you need to be assigned the appropriate role to create public lists that are available to all employees.

NOTE: A list that you or your managers create appears in only the language it is created. If you switch languages, it is not added to the lists in the other languages that the application supports. Only the default filtered lists appear in all languages. For example, if an Italian manager creates a new list and some of her team uses the Spanish version of the product, her team members don't see the newly-created list.

About Creating Bookmarks for List Pages

In most lists, the pages in the list share the same URL. As a result, when you create a bookmark for a page within a list, the bookmark always opens the list at the page that opened when you first accessed the list (usually the first page in the list). Similarly, when you copy the URL from the address field of a page within a list and later paste the URL into your browser address field, the list opens at the page that opened when you first accessed the list.

For example, when you open a list from a list link on the Account Homepage, the list opens at the first page. If you navigate to the third page in the list and create a bookmark for that page, then the new bookmark will open the list at the first page (that is, the page that opened when you first accessed the list).

NOTE: If you created a bookmark for a specific page within a list in Oracle CRM On Demand Release 18 or earlier, then that bookmark opens the list at the page where you originally created the bookmark. For example, if you created a bookmark for the fifth page in a list in Oracle CRM On Demand Release 18, then that bookmark opens the list at the fifth page. However, if you then navigate to the sixth page in the list and create a new bookmark for that page, then the new bookmark will open the list at the fifth page (that is, the page that opened when you first accessed the list from the bookmark you created in Oracle CRM On Demand Release 18).

List Management Options

In the List page for most record types, there is a Menu button with some or all of the following options:

- **Batch Delete.** Delete all the records from a list, see [Deleting and Restoring Records](#) (on page 100).
- **Batch Assign Book.** Add records to a book or remove records from a book, see [Assigning Records to Books](#) (on page 1200).

- **Export List.** Export a list to save on your computer, see [Exporting Records in Lists](#) (on page 81).
- **Mass Update.** Update a number of records at once, see [Updating Groups of Records](#) (on page 85).
- **Mass Call Planning.** Create a planned call for one or more customers, see [Mass Call Planning](#) (on page 133).
- **Record Count.** Count the records in a list, see [Counting Records in Lists](#) (on page 80).
- **Refine List.** Refine a filtered list, see [Creating and Refining Lists](#) (on page 73).
- **Show List Filter.** Show the key information for a list, see [View List Page](#) (on page 80). You can also access this page by clicking View in the Manage Lists page.
- **Manage Lists.** Manage the lists for the record type, see [Manage Lists Page](#) (on page 79).
- **Create New List.** Create a new filtered list, see [Creating and Refining Lists](#) (on page 73).
- **Save List.** Saves a list. When you click Save List, this brings you directly to a page with Save options.

Accessing the List Management Options

The way in which you navigate to the list management options varies with the record type as shown in the following table:

Record Type	Steps
Main record types (on tabs)	<ol style="list-style-type: none"> 1 Click the record tab at the top of the page. 2 In the Lists section, click a list. 3 Click the Menu button and select the required option. <p>You can also access the New List page as follows:</p> <ol style="list-style-type: none"> 1 Click the record tab at the top of the page. 2 In the List title bar, click the New button. <p>NOTE: Communication Lists are lists for specific types of activities. Therefore, use the Activities List page to create additional Communication Lists. Communication lists are available only if your company uses the call center,</p>
Activities	<ol style="list-style-type: none"> 1 Click the Calendar tab. 2 In the Open Tasks section, click the Show Full List link. 3 Click the Menu button and select the required option.
Alerts	<ol style="list-style-type: none"> 1 Click the Home tab. 2 At the bottom of the Alerts section on My Homepage, click the Show Full List link.

Record Type	Steps
	<p>3 Click the Menu button and select the required option.</p> <p>NOTE: If there are no alerts, the Show Full List link does not appear.</p>
Attachments	<p>Available only if your role includes the Manage Attachments privilege.</p> <p>1 At the top of any page, click the Admin global link.</p> <p>2 Click the Content Management link.</p> <p>3 On the Content Management page, click the Manage Attachments link.</p> <p>4 On the Manage Attachments page, click the Create New List button.</p>
Users	<p>Available only if your role includes the Manage Users and Access privilege.</p> <p>1 At the top of any page, click the Admin global link.</p> <p>2 Click the User Management and Access Controls link.</p> <p>3 Click the User Management link.</p> <p>4 Click the Menu button and select the required option.</p>
Product Categories	<p>Available only if your role includes the Manage Content privilege.</p> <p>1 At the top of any page, click the Admin global link.</p> <p>2 Click the Content Management link.</p> <p>3 On the Content Management page, click the Product Categories link.</p> <p>4 Click the Menu button and select the required option.</p>
Products	<p>Available only if your role includes the Manage Content privilege.</p> <p>1 At the top of any page, click the Admin global link.</p> <p>2 Click the Content Management link.</p> <p>3 On the Content Management page, click the Products link.</p> <p>4 Click the Menu button and select the required option.</p>

Standard Filtered Lists

For a description of the standard filtered lists, see the Working with the *record type* Homepage topic for each record type; for example:

- [Working with the Leads Homepage](#) (on page 160)
- [Working with the Account Homepage](#) (on page 177)
- [Working with the Contacts Homepage](#) (on page 195)
- [Working with the Opportunity Homepage](#) (on page 212)
- [Working with the Service Request Homepage](#) (on page 271)

To open a list

- 1 Click the record tab.

NOTE: For lists of activities, click the Calendar tab and then click Show Full List in the Open Tasks section. For information about working with lists of activities, see [Working with Activity Lists](#) (on page 121).

- 2 From the Lists section on the record Homepage, select the list you want to work with.

Changing the Sequence of Lists Appearing on a Homepage

You can use the following procedure, or from a Lists page, click Menu and select Manage Lists to access the List Order button.

To change the sequence of lists appearing on a Homepage

- 1 Click the record tab.
- 2 At the bottom of the record Lists section, click the Manage Lists link.
- 3 Click the List Order button.
- 4 In the Lists to Appear on Homepage list, use the arrows to change the sequence of the lists.
- 5 Click Save.

On the record Homepage, the lists appear in the sequence you set up. (Only the first 10 lists appear on the Homepage.)

Creating and Refining Lists

When you create or refine a list of records, your user role determines which fields you can search and which fields you can display in the list, as follows:

- If the All Fields in Search and Lists privilege is enabled on your user role, then you can search all fields and display all fields on the returned records.

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

- If the All Fields in Search and Lists privilege is not enabled on your user role, then you can search and display only the fields that are displayed on the Detail page layout that is assigned to your user role for that record type. If your company administrator has defined dynamic page layouts for the record type for your user role, then you can search and display all of the fields that are displayed on the various dynamic page layouts assigned to your user role. (*Dynamic layouts* are page layouts that show different sets of fields for different records of the same record type, depending on the picklist value that you select in a certain field on the record.)

However, when you refine a list that was created prior to Release 18 of Oracle CRM On Demand, you can search and display any fields that were already included in the list, as well as the fields that are displayed on the Detail page layout that is assigned to your user role.

Before you begin. When you create a list, you need to enter the fields and values for the criteria that you set up. You might want to first go to the record Edit page, and write down the exact field names and values as they are used in Oracle CRM On Demand. Otherwise, your filtered list might not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names. However, the printout does not capture the field values for drop-down lists.

To set up a list

- 1 Create a new list or navigate to the Refine List page for an existing list.

In the List page for most record types, there is a Menu button that includes the options to create a new list or refine an existing list. For more information about accessing list management options, see [Working with Lists](#) (on page 69).

- 2 In the New List page or the Refine List page, in the Search In section, select one of the following options:
 - Record Set
 - Book

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

- 3 If you select the Record Set option, select one of the following from the list in the Record Set field:
 - **All records I can see.** Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role, and the access level for shared records.
 - **All records I own.**
 - **All records where I am on the team.** Includes only records in the filtered list where one of the following applies:
 - You own the records.
 - The records are shared with you by the owner through the Team feature.

- The records are shared with you through the group assignment feature for accounts, activities, contacts, households, opportunities, and portfolios.
 - **All records I or my subordinates own.**
 - **All records where I or my subordinates are on the team**
 - **My Default Book.** Your default setting for the Book selector, as defined by your company administrator.
- 4 If you select the Book option, select a book, user, or delegate in the Book selector.
For more information, see [Using the Book Selector](#) (on page 57).
 - 5 In the Choose Case Sensitivity section, select the Case Insensitive check box, if required.
If this check box is selected, the fields where the search is case-insensitive are shown in blue in the Enter Search Criteria section.
 - 6 In the Enter Search Criteria section do the following:

- a Select a field from the Field list.

The fields are pre-populated with the targeted search fields for the record type.

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

If the address field you need does not appear in the drop-down list, select the corresponding one shown in the following table or in [About Countries and Address Mapping](#) (on page 1286).

NOTE: The fields listed in this table might not apply to all countries or locales.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory	Province

To filter your list on this field	Select this field from the drop-down list
Island Prefecture Region Emirate Oblast	
Island Code Boite Postale Codigo Postal	Zip/Post Code

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

If you are refining a list, the fields are already populated with criteria that you can refine further.

For information about using filter conditions, see [About Filter Conditions](#) (on page 51).

TIP: To create a list of service requests that do not have an owner, select the Owner ID field, the Equal to filter condition, and leave the value blank. You can create other null lists using this general approach.

CAUTION: When entering Filter Values, check to make sure that you are following the rules described in [About Filter Values](#) (on page 56). Otherwise, the correct records might not be included in the list.

Examples

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

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

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

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

- 7** For the Display Columns and Sorting Order section:
- a** Choose the fields to display as columns in the search results by moving fields from the Available Fields list to the Selected Fields list. Use the up and down arrows to change the order of the selected fields.
 - b** In the Sort by drop-down list select a default sort field, and click Ascending or Descending to select a sort order.

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

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

- 8 (Optional) To see the results of your search criteria without saving the list, click Run.

The List page appears displaying the results of your search criteria. You can then click the Menu button in the title bar, and select Save List or Refine List to save your list.

- 9 Click Save, and complete the fields in the Save options section:

Field	Comment
List Name	Type a name for the list (50-character limit). You can use any symbols or punctuation marks except quotation marks (") in your List Name. Created lists are arranged alphabetically. Therefore, consider putting the most pertinent word at the beginning of the name.
Description	Enter a description of up to 251 characters.
List Accessibility	If your user role includes the Define Public Lists privilege, select one of these options: <ul style="list-style-type: none"> ■ Private. Allows you alone to see the filtered list. ■ Public. Makes the list available to all employees. Public lists appear on the record Homepage for all employees at your company. ■ Role Specific. Make the list available only to users with a specific role.

- 1 Click Save and Run.

The filtered list you created appears in the drop-down list in this page's title bar and in the Lists section of the record Homepage.

TIP: If a message appears indicating that your list request has timed out, refine your list criteria further and try again. You can find more information about optimizing searches and lists on the Training and Support Center Web site, which you can access by clicking the Training and Support link at the top of each page within Oracle CRM On Demand.

Filtering Lists

In a List page you can quickly filter the records in the list in two ways:

- Using the Alpha Search controls to filter on a particular column
- Using a Quick Filter search

By default, list pages show the Alpha Search controls, but you can click the filter toggle icon to show the Quick Filter controls. To switch back to the Alpha Search controls, you can click the ABC icon. The search controls that are displayed persist across different sessions.

For more advanced filtering, you can also filter the list by clicking the Menu button in the title bar, and clicking Refine List.

You can also restrict the records that are searched by selecting a book or user from the Book selector. For more information, see [Using the Book Selector](#) (on page 57).

Alpha Search

With Alpha Search you can:

- Click on a letter in the Alpha bar to show only records that begin with that letter.
- Enter characters in the text field and click Go to find records beginning with those characters. You can use wildcards, see [About Filter Values](#) (on page 56).
- Click a column header to sort records based on that column. An arrow next to the column header indicates which column the sort is based on, and whether it is sorted in ascending or descending order. By default, records are searched using the left-most column as the search key.

Alpha Search is case insensitive and does not affect the Refine list search criteria.

Occasionally, the Alpha bar is not active—its characters are not hyperlinks—because the default sort order is on a column that the Alpha bar does not work with. For example, the default sort order for the Deleted Items page is on the Type column, which is not sortable. Therefore, the Alpha bar is not active. However, if you click the Name column header, the data is sorted, and then the Alpha bar is activated.

Quick Filter Search

With Quick Filter search you can filter the list to show records where a selected field meets particular filter criteria.

In the Show Results Where section of the page, you select or enter values from left-to-right in the fields to specify respectively the search field, filter condition, and filter value (if the filter condition requires a value). The values available in the filter condition list vary according to the search field you select. For information about the filter conditions available, see [About Filter Conditions](#) (on page 51).

The fields that are available in the list of search fields are those that are optimized for fast lookup, plus any additional fields that your company administrator has specified.

The filter value field changes to match the field type. For example, a calendar icon is displayed when you want to select a date, and a telephone icon is displayed when you want to specify a telephone number. The filter value field is hidden when no value is required with the filter condition. For text and telephone fields, you can use wildcards, see [About Filter Values](#) (on page 56).

Quick Filter Search is case insensitive and does not affect the Refine list search criteria.

To perform a Quick Filter Search

- 1 Select a field in the drop-down list to the right of the label Show Results Where.

- 2 Select a condition from the filter condition drop-down list.
- 3 If required, enter a value in the filter value drop-down list.
- 4 Click Go.

Manage Lists Page

The Manage Lists page shows the filtered lists for a specific record type:—those lists that you created, the lists your managers created for you to use, as well as lists provided by the system. You can access the Manage Lists page by selecting Manage Lists from the Menu button on a list page. For more information about accessing list management options, see [Working with Lists](#) (on page 69).

From this page, you can perform the tasks shown in the following table.

To do this	Follow these steps
Add a list to Favorite Lists	In the row for the list, click the Add to Favorites icon.
Change the sequence of the first 10 lists on the record Homepage and drop-down list	<p>In the Manage Lists title bar, click the List Order button. On the List Display Order page, change the order of the 10 lists until they reflect the sequence you want. The lists appear in the new sequence on your record Homepage and the drop-down list on List pages.</p> <p>NOTE: Lists that remain in the Available list do not appear as options in drop-down lists or on Homepages.</p>
Create a filtered list	In the Manage Lists title bar, click the New List button. On the New List page, enter the required information, and save the record.
Delete a list	<p>In the row for the list you want to delete, click the Delete link.</p> <p>You can delete only lists that you created.</p>
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a list	<p>In the row for the list you want to update, click the Edit link. This opens the Refine List page, where you can update the list.</p> <p>NOTE: You cannot change the standard filtered lists distributed with the application, or the filtered lists saved before the updating capability became available.</p>
View the key information and filter information for a list	In the row for the list, click the View link. This opens the View List page.

View List Page

The View List page displays the following information:

- **Key list information.** The name and description of the list and also:
 - **List accessibility.** The visibility of the list indicating whether it is private, public, or specific to a user role.
 - **Search In.** The subset of records that are searched to filter the list.
- **Filter information.** The fields, filter conditions, and filter values used to produce the filtered list.
- **Selected Fields.** The fields selected to display as columns in the search results, and the sort order of the field selected as the default search field.

You access the View List page by selecting Show List Filter from the Menu button on a list page. For more information about accessing list management options, see [Working with Lists](#) (on page 69).

Favorite Lists Page

When you click the Show Full List link in the Favorite Lists section of the Action Bar, the Favorite Lists page opens, showing your favorite lists.

The following table describes the tasks that you can perform from the Favorite Lists page.

To do this	Follow these steps
Change the sequence of the lists	In the Favorite Lists title bar, click the Manage Favorites button. On the Manage Favorites page, change the order of the lists until it reflects the sequence that you want. The lists appear in the new sequence on the Action bar and the Favorite Lists page.
Delete a list from the list of favorites	In the row for the list that you want to delete, click the Remove link.
Display a list	Click the name of the list to display the List page from which you can work with the list.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.

You can embed Favorite Lists as a Web widget in other applications. For more information, see [Embedding a Favorite Lists Widget](#) (on page 624).

Counting Records in Lists

The following procedure describes how to count the records in a list.

To count the records in a list

- On the record List page, click Menu, then select Record Count.

NOTE: If there are more than 1000 records in the list, then the count operation fails, and a message is displayed indicating that too many records match your search criteria. If this happens, refine your list so that fewer records are returned. If the count operation takes more than 30 seconds, then the operation fails. If this happens, try again later, or refine your list so that fewer records are returned. For more information about refining lists, see [Creating and Refining Lists](#) (on page 73).

Exporting Records in Lists

You can export the records that meet the criteria you set up in a list. After Oracle CRM On Demand exports the list of records, you can save it by downloading the file.

NOTE: Oracle CRM On Demand retains your export results for 72 hours. After that, you must export the list again.

You can export up to 250 records from a list immediately. When you select this option, the top records from the list (based on the current sort order of the list) up to a maximum of 250 are exported. Or, you can export all of the records in a list. When you export all of the records in a list, your export request is queued and executed as a batch job.

To export records from a list, your user role must include either the List - Export all Fields privilege or the List - Export Displayed Fields privilege. When you export a list of records, your user role determines which fields you can export, as follows:

- If the List - Export all Fields privilege is enabled on your user role, then you can choose to export all of the fields on the records, or to export only the fields that are displayed in your list.
- If the List - Export Displayed Fields privilege is enabled on your user role, but the List - Export all Fields privilege is not enabled, then you can export only the fields that are displayed in your list.

The following procedure describes how to export up to 250 records in a list.

To export up to 250 records in a list

- 1 Open the list of records that you want to export.
- 2 If necessary, sort the list so that the records that you want to export appear at the top of the list.

TIP: To sort the list by column, click the column heading. To sort the list by the same column but in reverse order, click the column heading again.

- 3 On the record List page, click Menu, and select Export List.

- 4 On the Export List page:

- In the Export Type section, select the Immediate Export option.
- In the Fields to Export and Field Delimiter sections, select the options that you want.

NOTE: The Fields to Export section is available only if your user role has the List - Export all Fields privilege.

5 Click Export.

6 Click Download to download the file.

The following procedure describes how to export all of the records in a list.

To export all of the records in a list

1 Open the list of records that you want to export.

2 On the record List page, click Menu, and select Export List.

3 On the Export List page:

- In the Export Type section, select the Queued Export option.
- In the Fields to Export and Field Delimiter sections, select the options that you want.

NOTE: The Fields to Export section is available only if your user role has the List - Export all Fields privilege.

4 Click Export.

The Personal Export Request Queue page appears.

5 If the export request is in the Pending Requests section of the page, click Refresh to see if your update request has completed.

6 When your export request appears in the Completed Requests section of the Personal Export Request Queue page, click the List or Record Type link to open the List Export Request Detail page.

7 In the Export Request Attachment section of the page, in the row that contains the ZIP file you want to download, select Download from the record-level menu.

The ZIP file consists of an export summary text file and CSV file for each type of record that you exported.

The ZIP files of lists that are exported as queued requests are available through your Personal Export Request Queue page for 72 hours after the export request is completed. The following procedure describes how to access the ZIP files from your Personal Export Request Queue page.

To access the ZIP files from your Personal Export Request Queue page

1 In the upper-right corner of any page, click My Setup.

2 Click Data & Integration Tools.

3 Click Export Request Queue.

The Personal Export Request Queue page appears, showing the details of the export requests.

4 In the Completed Requests section, click the Export Type or Record Type link to open the List Export Request Details page.

- 5 In the Export Request Attachment section of the page, in the row that contains the ZIP file, you can do the following:
 - Select Download from the record-level menu to open or save the ZIP file.

The ZIP file consists of an export summary text file and CSV file for each type of record that you exported.
 - Click Delete to delete the file.

Transferring Ownership of Records

You own a record when your name is in the Owner field. Typically, you can view and edit all records that you own. You become an owner when:

- You create the record
- The record is assigned to you
- You are in a group that owns the record (with group ownership, your name might not appear in the Owner field)

You can transfer the ownership of most records if:

- You own the record
- One of your direct reports owns it
- Your privilege and your access level permit it

NOTE: For account, contact, and opportunity records only, you can also transfer the ownership if the record owner has granted you full-access rights to that record.

To transfer ownership of a record

- 1 Select the record.

For instructions on selecting records, see [Finding Records](#) (on page 41).

- 2 On the Detail page, click Edit to open the Edit page.

NOTE: If the inline edit feature is enabled for your company, you do not have to open the Edit page. Instead, you can edit the Owner field directly on the Detail page.

- 3 Click the Lookup icon next to the Owner field.
- 4 In the Lookup window, click the Last Name link of another employee.
- 5 Save the record.

Sharing Records (Teams)

For some record types, you can share a record so that a team of users can view it. The following record types can be shared by teams:

- Account
- Accreditation
- Application
- Business Plan
- Certification
- Contact
- Course
- Custom Objects
- Deal Registration
- Exam
- Household
- Lead
- MDF Request
- Objective
- Opportunity
- Partner
- Portfolio
- Service Request
- Special Pricing Request

With account records, you can also share the contact and opportunity records that are linked to that account record.

To share a record, you first add the person to the Team for the selected record. Then you specify the access level the person has to the record.

To share a record

- 1** Select the record.
For instructions on selecting records, see [Finding Records](#) (on page 41).
- 2** On the record Detail page, scroll down to the Team section and click Add Users.
- 3** In the Team Add User window, click the Lookup icon next to User.
- 4** In the Lookup window, select an employee.

5 Set roles and access levels:

NOTE: Depending on the record type and setup, your application might differ from these options.

- a** (Optional) To explain the role the linked record plays in relation to the main record, select an option from the Team Role drop-down list.
- b** To set the access rights for the record type for team members, select an option from the Access drop-down list. The options that are available by default are as follows:
 - **Read-only.** Users can view records but not change them.
 - **Edit.** Users can update records.
 - **Full.** Users can update or delete records.

Your company administrator can make other access profiles available for teams.

NOTE: Your managers have owner access to records of their subordinates (as long as Manager Visibility is turned on for the company) regardless of your selections here. For any user, the most liberal access set at any point in the application is the one that determines the access level for that user. For more information about access profiles, see [Access Profile Management](#) (on page 1133).

6 Click Save.

7 (Opportunity teams only) To allocate part or all of the revenue on the opportunity to a team member, do the following:

- a** In the Opportunity Detail page, in the Opportunity Team section, click Edit Users.
- b** In the Opportunity Team Edit Users page, in the Split % field, enter the percentage of the value that is to be allocated to the team member.

The value in the Split % field can be any number from 0 (zero) to 100.

NOTE: The Split Revenue field is a read-only field that is calculated from the Split % field on the opportunity team record and the Revenue field on the opportunity record.

- c** Click Save.

Related Topics

See the following topic for related information about opportunity teams:

- [About Opportunity Teams](#) (on page 225)

Updating Groups of Records

You can update the values in fields for a list of records at the same time, for the following record types:

- Accounts
- Activities (tasks, appointments)

- Contacts
- Opportunities
- Leads
- Service Requests

For example, you might want to change the owner of a batch of records to a different employee. You can do this by updating groups of records.

You can update values in up to 50 selected records at a time. If there are more than 50 records in the list, you can repeat the task until all of the records are updated. Or, you can further refine your list so that only the records that you want to update are present in the list.

NOTE: If you use the Mass Update feature to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage. If you want the probability percentage on the opportunities to change when the sales stage is updated, you must change the sales stage on each record individually, or through Web services.

Before you begin. Do the following:

- If necessary, create a list to capture the records that you want to update. For information about creating and using lists, see [Working with Lists](#) (on page 69).
- To update groups of records, your user role must include the Mass Update privilege.

The following procedure describes how to update selected records in a list.

To update selected records in a list

- 1 Open the list of records that you want to update.
- 2 If necessary, sort the list so that the records that you want to update appear at the top of the list.
TIP: To sort the list by column, click the column heading. To sort the list by the same column but in reverse order, click the column heading again.
- 3 On the record List page, click Menu, and select Mass Update.
- 4 In Step 1, clear the check box for records you do not want to update, and then click Next.
- 5 In Step 2, select the fields that you want to update, and enter new values for those fields.
You can select up to five fields to update to new values. To remove existing values from a field, leave the Value column blank in Step 2.
- 6 Click Finish.

Merging Records

For certain record types, including accounts, contacts, leads, service requests, households, and portfolio accounts, if you have a duplicate record, you can merge the two records into one record.

When you merge two records, you specify the field values from the two records that you want to keep in the record that you retain, which is called the *primary record*. The record that is deleted is called the *duplicate record*.

The following considerations apply to the merging of records:

- If a field has the same value on both the primary record and the duplicate record, you cannot change the value in that field during the merge operation.
- In fields that are updated by the system, the value defaults to the value from the primary record during the merge operation, and you cannot change the value.
- Account and contact teams are not merged. The team from the primary record is retained.
- Any records that are linked to the duplicate record are linked to the primary record.
- There is no duplicate checking for related records. To remove duplicate related records you must delete them.
- When you merge accounts, the owner of the duplicate account record is added to the account team and given full access to the primary record.

Before you begin:

- To perform this procedure, your user role must include the Merge Records privilege.
- Your access level for both the primary record and the duplicate record must allow you to delete the record. If your access level for the primary record does not allow you to delete the record, the Merge button is not available on the record.
- Note the record names so that you can select them during the merge.

To merge two records

- 1 Select the record you want to retain as the primary record.
For instructions on selecting records, see [Finding Records](#) (on page 41).
- 2 On the record Detail page, click the Merge button.
- 3 In Step 1, click the Lookup icon, and select the Duplicate record.
- 4 In Step 2, review the values for each record, and select the values to save with the record.
The Value to Save column displays the values from the primary record by default.
- 5 Click Finish.

Adding Notes

For record types that support the notes feature, you can add a note in two ways:

- By clicking the note icon at the top-right of the record Detail page. This is available if the Message Center is enabled for your company. With this method you can add notes to a list of notes for the record, and subscribe to notes that are added to the record.

- By clicking New in the Notes section.

Typically, if your company administrator has made the note icon available, the Notes section will not be available. However, if the Notes section is present, notes that you add to the list of notes are also added to the Notes section.

For more information about the Message Center, see [Working with the Message Center](#) (on page 35). For more information about using the list of notes, see [Working with the List of Notes](#) (on page 89).

The method used to create a note makes no difference to the access permissions to the note.

To add a note using the note icon

- 1 Select the record.
For instructions on selecting records, see [Finding Records](#) (on page 41).
- 2 On the Detail page, click the note icon.
- 3 Click New Note.
- 4 On the top line of the note, fill in the Subject.
- 5 To prevent others from viewing the note, select Private.
If you do not select Private, others with access to this record can view the note.
- 6 Click Save.

To add a note in the Notes section

- 1 Select the record.
For instructions on selecting records, see [Finding Records](#) (on page 41).
- 2 On the Detail page, scroll down to the Notes section and click New in the Notes title bar.
- 3 On the Note Edit page, fill in the Subject.
- 4 To prevent others from viewing the note, select Private.
If you do not select Private, others with access to this record can view the note.
- 5 Save the record.

Note Edit Page

The Note Edit page lets you add a note to a record or update information in an existing note. It shows the complete set of fields for a note record.

Field	Description
-------	-------------

Field	Description
Subject	A required text field where you enter a brief description of the content or purpose of the note.
Private	If you select this check box, other users cannot view the note. If you do not select this check box, anyone with access to this record can view the note.
Description	<p>The content of the note. The maximum number of characters allowed is 16,350.</p> <p>NOTE: Different restrictions apply when you import notes into Oracle CRM On Demand (see Note Fields: Import Preparation (on page 1404)).</p>

Note Page (List)

The Note page shows all notes linked to a record. The following table describes what you can do from the Note page:

To do this	Follow these steps
Create a note	In the Notes title bar, click the New Note button. On the Note Edit page, complete the required information and save the record.
Delete a note	Click the Del link in the row of the record you want to delete. You can restore deleted items up to 30 days after deletion.
Find a note	Click the Subject column header to sort the data. Then click a letter in the Alpha bar. For notes beginning with numbers, click 0-9.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a note	Click the Edit link in the row of the record you want to update. On the Note Edit page, update the information and save the record. You can also edit the fields that are displayed on the Notes page inline.
View note details	Click the Edit link in the row of the record you want to update. On the Note Edit page, review the note details.

Working with the List of Notes

If this feature is enabled for your company, the record Detail pages contain a note icon at the top right of the page. The number next to the note icon indicates the number of notes attached to the record.

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

From the list of notes you can do the following:

To do this	Follow these steps
View a note	Scroll down to the required note.
Create a new note	Click New Note. Type a subject on the first line, type the note, and click Save. The note is sent to the Message Center of all users who have subscribed to the record. From the Message Center, users can click a link on the note to navigate to the record.
Subscribe to notes on the record	Click Subscribe. For more information, see Subscribing to Notes (on page 90).
Delete a note	Scroll down to the required note, and click Delete. This action deletes the note from the Message Center and the record Detail pages.
View details of the user who sent a note	Scroll down to the required note, and click the user name. The User Details page for the user is displayed.

Subscribing to Notes

You can subscribe to notes that are added to a record so that when someone adds a note to the record, the note is sent to your Message Center. You can subscribe to notes on any records to which you have access.

From the Message Center you can click on a link in a note on a record to navigate to the record.

For more information about the Message Center, see [Working with the Message Center](#) (on page 35).

To subscribe to notes on a record

- 1 Select the record.

For more information on selecting records, see [Finding Records](#) (on page 41).

- 2 On the Detail page, click the note icon.

- 3 Click the Subscribe button.

The button label changes to Unsubscribe. You can cancel the subscription by clicking the Unsubscribe button.

Sending Notes to Other Users

You can send a note to other users by clicking a note icon that is displayed next to a user's name in the application. The note is sent to the Message Center of the user.

You can use this facility with the fields associated with a user name, such as First Name, Owner, Created By, and Modified By. These fields appear in Detail pages, lists, and other places in the application.

From the Message Center you can reply to notes from other users.

You can add user records to the favorite Records section in the Action bar. This allows quick access to the users that you often send messages to.

For more information about using the Message Center, see [Working with the Message Center](#) (on page 35).

To send a note to another user

- 1 Move the pointer over the field associated with the user name so that the note icon appears.
- 2 Click the note icon
- 3 Type the note, and click Save.

Working with Attachments

Depending on how your company administrator configures your user role and access profiles, you might be able to attach files (and in some cases, URLs) to various record types. You can find instructions on attaching files in the following topics:

- For instructions on attaching files and URLs through the preconfigured Attachments related item, see [Attaching Files and URLs to Records](#) (on page 94).
- For instructions on attaching files to records that support attachment fields, see [Attaching Files to Records through Attachment Fields](#) (on page 98).

For a list of the record types that support the preconfigured Attachment related item, and a list of the record types that support attachment fields, see [About Attachments](#) (on page 92).

Related Topics

See the following topics for more information about attachments:

- [About Attachments](#) (on page 92)
- [Attachment Related Items](#) (on page 96)
- [Attachment List Page](#) (on page 97)

About Attachments

Depending on the record type and on how your company administrator has configured Oracle CRM On Demand, you can attach files to some records in the following ways:

- Through the Attachments related item on parent records
- Through attachment fields

About the Attachments Related Item

On certain record types, your company administrator can add the preconfigured Attachments related item to your record page layout. You can then link multiple attachments to a parent record. An attachment that is linked to a parent record in this way can contain a file or a URL.

The following record types support the preconfigured Attachments related item:

- Account
- Activity
- Campaign
- Contact
- Custom Objects 01, 02, and 03
- Dealer
- Fund
- Fund Request
- Household
- Lead
- Opportunity
- Partner
- Program Membership
- Service Request
- Solution

Attachments can also be linked to alert records and sales stage records.

NOTE: When you delete a parent record that has attachments linked to it in this way, the attachments are also deleted from the Oracle CRM On Demand database.

For information about attaching files and URLs to records through the preconfigured Attachments related item, see the following topics:

- [Attaching Files and URLs to Records](#) (on page 94)
- [Attachment Related Items](#) (on page 96)
- [Attachment List Page](#) (on page 97)

About Attachment Fields

On the following record types, you can attach a single file to a record through attachment fields. Depending on how your company administrator has configured your page layouts, the attachment fields might be available on the following record types:

- Custom Objects 01, 02, 03, 04, and higher

NOTE: Your company administrator can also configure Custom Object record types as related items on other record types. If the attachment fields are available on the related Custom Object record type, you can attach one file to each related record. Such configurations allow you to link multiple files to a parent record. For more information, see [About Attachment Configurations](#) (on page 1102).

However, when you delete a parent record, the linked Custom Object records and the attached files are not deleted from the Oracle CRM On Demand database.

- Inventory Audit Report
- Sample Transaction

The following record types also support attachment fields. However, these record types can be used only as related items, as follows:

- Accreditation Attachment

The Accreditation Attachment record type can be made available as a related item on the Accreditation record type only.

- Application Attachment

The Application Attachment record type can be made available as a related item on the Application record type only.

- Certification Attachment

The Certification Attachment record type can be made available as a related item on the Certification record type only.

- Course Attachment

The Course Attachment record type can be made available as a related item on the Course record type only.

- Exam Attachment

The Exam Attachment record type can be made available as a related item on the Exam record type only.

- MDF Request Attachment

The MDF Request Attachment record type can be made available as a related item on the MDF Request record type only.

- Partner Program Attachment

The Partner Program Attachment record type can be made available as a related item on the Partner Program record type only.

- Policy Attachment

The Policy Attachment record type can be made available as a related item on the Policy record type only.

■ Special Pricing Request Attachment

The Special Pricing Request Attachment record type can be made available as a related item on the Special Pricing Request record type only.

NOTE: In these configurations, when you delete a parent record, the linked records and the attached files are not deleted from the Oracle CRM On Demand database. For example, when you delete an MDF Request record, any linked MDF Request Attachment records, and the files attached to those records, are not deleted from the database.

Some of these record types are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition and might not be available in your edition of Oracle CRM On Demand.

For information about attaching files to records through attachment fields, see [Attaching Files to Records through Attachment Fields](#) (on page 98).

Attaching Files and URLs to Records

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see [About Attachments](#) (on page 92).

On record types that support the preconfigured Attachments related item, you can attach files and URLs to a parent record. After a file or URL is attached to a record, you can:

- View the attachment
- Select a different attachment
- For a file attachment, update the file content and replace the previous attachment with the revised one

When attaching files to records, the following considerations apply:

- You can upload compressed files, including .zip files.
- For data protection and security reasons, Oracle CRM On Demand does not allow you to attach executable files with file extensions such as .exe or .bat.

NOTE: When a user clicks on an executable file with an extension such as .exe or .bat, the user is given the option of running the file or saving it. To prevent users from inadvertently running an executable file directly from Oracle CRM On Demand in this way, Oracle CRM On Demand does not allow you to attach files with such file extension to records. However, you can work around this by giving the file a different file extension before you upload it. If you give the file a file extension such as .txt, then a user who clicks on the file is not given the option of running the file. The user must save the file to a local machine, change the file extension to the appropriate extension for the executable file, and then run the executable file.

- Each file that you attempt to upload is scanned for viruses. If a virus is found in the file, the file is not uploaded, and a message appears.
- Uploaded files must be less than 20 MB. If you have a large file, consider the following options:
 - Compress the file to make it smaller.
 - Split the file into smaller files (and compress them if necessary).
 - Place the file on a public server and indicate the path and file name for it instead of attaching the file to the record.

To attach a file or URL to a record

- 1** Select the record that you want to attach the file or URL to.
For instructions on selecting records, see [Finding Records](#) (on page 41).
- 2** On the Detail page, scroll down to the Attachments section and click Add Attachments or Add URL in the title bar.
NOTE: If you want to send users to a public server to access the file, click Add URL instead of Add Attachment and follow the procedure for adding a URL attachment, and not a file attachment.
- 3** On the Attachment Edit page, do the following:
 - For a file attachment, click the Browse button next to the File field and select the file. Fill in the Attachment Name field with a display name that identifies the file attachment.
 - For a URL attachment, fill in the URL field with the URL address (for example: www.crmondemand.com) and the Attachment Name field with a display name that identifies the URL. The maximum allowed length of the URL address is 200 characters.
NOTE: If you have placed a file attachment on a public server, fill in the URL field with the path and filename (for example: `\\scdept\attachments\products.xls`).
- 4** On the Attachment Edit page, click Save.

To view an attachment

- 1** Select the record that the file or URL is attached to.
For instructions on selecting records, see [Finding Records](#) (on page 41).
- 2** On the Detail page, scroll down to the Attachments section and click View in the appropriate row.

To select a different attachment

- 1** Select the record that the file or URL is attached to.
For instructions on selecting records, see [Finding Records](#) (on page 41).
- 2** On the Detail page, scroll down to the Attachments section and click the Attachment Name link for the attachment you want to replace.
- 3** On the Attachment Edit page, do the following:
 - For a file attachment, click the Browse button and select the new file. Update the Attachment Name field, if necessary.
 - For a URL attachment, fill in the URL field with the new URL address and update the Attachment Name field, if necessary.
- 4** On the Attachment Edit page, click Save.

TIP: To verify that you have entered the correct attachment information, click the Back link until you return to the original record Detail page. In the Attachments section, review the new attachment record.

To update a file attachment

- 1 Open the attachment from its original location, but not from within Oracle CRM On Demand.
- 2 Edit the file and save it locally, such as to your hard drive.
- 3 Sign in to Oracle CRM On Demand.
- 4 Select the record that you want to attach the updated file to.
For instructions on selecting records, see [Finding Records](#) (on page 41).
- 5 On the Detail page, scroll down to the Attachments section and click Replace in the row of the file attachment.
- 6 In the Replace Attachment window, select the updated file and click Save.

Attachment Related Items

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see [About Attachments](#) (on page 92).

The following table describes field information for a file or URL that you attach as a related item on a record. Some fields appear on the Detail pages for the record type you are attaching the file to; other fields appear on the Attachment Edit page.

Review the information in the following table to make sure your file meets the file size and file type requirements.

Field	Description
File	For a file attachment, this field shows the path and filename of the attached file.
Attachment Name	The name you want to use to identify the file or URL.
Size (in Bytes)	For a file attachment, the file size. The file size must be less than 9 megabytes (MB). If the attachment is a URL, the Size field shows a value of 2 kilobytes (KB) by default.
Type	For a file attachment, this field shows the file type, such as .doc for a Microsoft Word document. For your data protection and security, the application does not allow you to attach files with the .exe file extension. For a URL attachment, it displays URL.
URL	For a URL attachment, this field contains the complete URL address. The maximum allowed length of the URL address is 200 characters.
Created By	The alias of the person who first attaches the file to the record. The value in this field is system-generated.

Field	Description
Modified By	The name of the person who updates the record followed by the date and time it is updated. The value in this field is system-generated.

Attachment List Page

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see [About Attachments](#) (on page 92).

The Attachment List page shows all files and URLs linked to a record. You access the Attachment List page by clicking the Show Full List link in the Attachments section of the main record.

The following table describes the tasks you can perform from the Attachment List page.

To do this	Follow these steps
Attach a file to the record	In the Attachments title bar, click the Add Attachment button. On the Attachment Edit page, complete the required information and save the record.
Attach a URL to the record	In the Attachments title bar, click the Add URL button. On the Attachment Edit page, complete the required information and save the record.
Delete an attachment	Click the Del link in the row of the record you want to delete. You can restore deleted items up to 30 days after deletion.
Find an attachment	Click the Attachment Name column header to sort the data. Then click a letter in the alphabet bar. For attachment names beginning with numbers, click 0-9.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Select a different attachment to replace the current one	Click the Replace link in the row of the record you want to change. On the Attachment Edit page, select another file and save the record.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Sort the list of attachments	Click the underlined column header you want to sort on. If the column header is not underlined, you cannot sort on that field.
View the attachment	Click the View link in the row of the record you want to view. This opens the file or takes you to the URL.

Attaching Files to Records through Attachment Fields

Attachment fields are supported on Custom Object record types and on certain record types that are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition. The attachment fields allow you to attach a single file to a record. For a list of the record types where attachment fields are supported, see [About Attachments](#) (on page 92).

Your company administrator determines if the attachment fields are available on the page layouts for your user role.

When attaching files to records, the following considerations apply:

- You can upload compressed files, including .zip files.
- For data protection and security reasons, Oracle CRM On Demand does not allow you to attach executable files with file extensions such as .exe or .bat.

NOTE: When a user clicks on an executable file with an extension such as .exe or .bat, the user is given the option of running the file or saving it. To prevent users from inadvertently running an executable file directly from Oracle CRM On Demand in this way, Oracle CRM On Demand does not allow you to attach files with such file extension to records. However, you can work around this by giving the file a different file extension before you upload it. If you give the file a file extension such as .txt, then a user who clicks on the file is not given the option of running the file. The user must save the file to a local machine, change the file extension to the appropriate extension for the executable file, and then run the executable file.

- Each file that you attempt to upload is scanned for viruses. If a virus is found in the file, the file is not uploaded, and a message appears.
- Uploaded files must be less than 20 MB. If you have a large file, consider the following options:
 - Compress the file to make it smaller.
 - Split the file into smaller files (and compress them if necessary).
 - Place the file on a public server and indicate the path and file name for it instead of attaching the file to the record.

The following procedure describes how to attach a file to a record through attachment fields.

To attach a file to a record through attachment fields

- 1 On the Edit page of the record to which you want to attach the file, in the Attachment field, click the paper clip icon:



- 2 Browse to the file you want to attach and select it.
- 3 Save your changes.

NOTE: Depending on how your company administrator configures the page layout, you might see the Attachment: File Name field and the Attachment: Size (In Bytes) field on the page. If these fields are present, they are automatically populated with the file name and file size when you save the record. You cannot edit these fields.

You can remove an attached file from a record. However, when you remove the file, it is deleted from the Oracle CRM On Demand database, and you cannot restore it from within Oracle CRM On Demand.

TIP: Before you remove the file from the record, download the file to your local machine or another server and save it.

The following describes how to remove a file from a record.

To remove a file from a record

- 1 On the record Edit page, click the X icon next to the Attachment field.
- 2 Confirm that you want to remove the file from the record.

Using Assessment Scripts

If your company administrator has set up assessment scripts, you can access the scripts to collect information about your customer or sales opportunity. The information can then be mapped to the parent record and used in reports and analyses later.

The application allows you to access scripts from these record types:

- Lead (Lead Qualification scripts)
- Contact (Satisfaction surveys)
- Service Request (Call Scripting and Satisfaction surveys)
- Opportunity (Opportunity Assessments)
- Activity (Activity Assessments on a Sales Call, Task, or Appointment)

Your company administrator can set up filters to help you to identify the appropriate assessment for a task. For example, a lead qualification assessment script might be set up with the following filters:

- Account Tier = Gold
- Segment = Large
- Region = West

Then, when you launch an assessment script from a lead record with the corresponding filter field values, the correct lead qualification script is listed. After an assessment is completed, data that the company administrator changes subsequently in the template script is not reflected in the completed assessment record. The answer section is the only exception to this rule. The company administrator can change data in the answer section at any time, and changes are reflected in the assessment detail page when you work through the template questions.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see [About Assessment Scripts](#) (on page 1477).

To use an assessment script

- 1 Select the record.

For instructions on selecting records, see [Finding Records](#) (on page 41).

- 2 On the record Detail page, scroll down to the script section and click Add.

- 3 If necessary, select the script from the Lookup window.

If only one script meets the criteria defined by your company administrator, the script opens automatically. Otherwise, you need to select the appropriate script in the Lookup window.

TIP: To find the appropriate script, select an option from the drop-down list, and click Go.

- 4 On the script page, ask your customer the questions and fill in the information.

- 5 Click Save.

Depending on how your company administrator set up this script, these events might occur:

- A score is calculated and compared to a threshold.
- Depending on whether the score is above or below the threshold, an outcome is calculated.
- The score, answers to the questions, and the outcome are mapped back to the parent record.
- The last assessment date is also populated.

Deleting and Restoring Records

You can delete a record if your access level to that record allows it. You can delete a list of records if your role includes the Batch Delete privilege.

When you delete a record or a list of records, the records are stored for 30 days in the Deleted Items area. During that time, you can restore the records. However, after 30 days, the deleted items are permanently purged and cannot be retrieved.

NOTE: Alert records and their attachments are the exception to the normal deletion behavior. Instead of being stored for 30 days, they are immediately purged from the system and cannot be restored.

Deleting a record automatically deletes some records linked to the record you are deleting. For example, if you delete an account, any linked notes are also deleted.

When you click the Deleted Items global link, the All Deleted Items page appears with all the items you have deleted. If your user role includes the Recover All Records privilege, you will see all deleted items for your company.

The parent record appears in the deleted items list, but the linked records do not. The only time a linked record appears as a separate record is when you delete the linked record *before* deleting the parent record.

For example, if you delete an account with three activities linked to it, only the account record appears in the list of deleted items. However, if you had deleted one of those linked activities before deleting the account itself, that activity would appear in the list as a separate record.

When you restore a record, all records linked to that record at the time it was deleted are also restored with their relationships intact. Always restore the parent record first; if you try to restore a child record first, the system displays an error message.

You can use the list on the All Deleted Items page to help you to find deleted records. When you select a record type from the list, the records that are displayed include all deleted notes and attachments for records of that type, as well as all deleted records of that type. However, the rule for linked records still applies. Notes and attachments that were deleted with the parent record are not shown in the list. For example, if you select All Accounts in the list, all account notes and account attachments that were deleted separately from their parent record are displayed, as well as all deleted account records.

NOTE: Companies are limited to the amount of data they can store. Records stored in Deleted Items do not count towards a company's total disk storage limit.

To delete a record from a record Detail page

- On the record Detail page, click Delete.

NOTE: If you access the record Detail page by drilling down from a List page or from a list of related records on a parent record, then after you delete the record, Oracle CRM On Demand returns to the page from which you drilled down.

To delete a record in a list of records

- In the row for the record that you want to delete, choose Delete from the record-level menu.

To delete a list of records

Before you begin. To perform this procedure, your user role must include the Batch Delete privilege.

- 1 From the record Homepage, click the list of records you want to delete.

TIP: Export the list before you delete it. Exporting the list allows you to import the data in to Oracle CRM On Demand if you delete some records in error.

You can delete lists of accounts, contacts, opportunities, leads, service requests, or activities.

- 2 On the record Lists page, click the Menu button and select Batch Delete.

- 3 Click OK to confirm that you want to proceed.

- 4 On the Batch Delete Queue page, click Proceed in the Active Requests section.

NOTE: If you do not click Proceed, the deletion does not occur. You can return to the Batch Delete Queue by clicking the Admin global link and then the Batch Delete Queue link on the Admin Homepage.

- 5 To review the log file for the deletion, click Log in the Processed Requests section.

To restore a record

- 1 Click the Deleted Items global link.
- 2 Click Restore in the row for the record.

NOTE: If your role includes the Recover All Records privilege, you can restore records that anyone at your company deleted.

The following table provides further information about deleting records.

NOTE: The attachment records referred to in this table are the attachment records that are linked to parent records through the preconfigured Attachments related item. Files can also be attached to Custom Object record types, and to certain record types that are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition, through attachment fields. If such a record type is configured as a related record on another record type, the linked records and the attached files are not deleted from the Oracle CRM On Demand database when the parent record is deleted. For more information about the Attachments related item and attachment fields, see [About Attachments](#) (on page 92).

If you delete this	You should be aware of this
Account	<p>You cannot delete an account if it is linked to an Opportunity with a Sales Stage of Closed-Won.</p> <p>When deleting an account, these linked records are also deleted:</p> <ul style="list-style-type: none"> ■ Leads ■ Opportunities ■ Activities (along with any attachments linked to this activity) ■ Notes ■ Attachments <p>These linked records are not deleted:</p> <ul style="list-style-type: none"> ■ Contacts
Activity	<p>When deleting an activity, these linked records are also deleted:</p> <ul style="list-style-type: none"> ■ Attachments <p>If you want to delete a Communication Activity, the Manage Company and Batch Delete privileges must be enabled for your role.</p>
Alert	<p>Alert records and their attachments are the exception to the normal deletion behavior. Instead of being stored for 30 days, they are immediately purged from the system and cannot be restored.</p>

If you delete this	You should be aware of this
Campaign	<p>When deleting a campaign, these linked records are also deleted:</p> <ul style="list-style-type: none"> Activities (along with any attachments linked to this activity) Notes <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> Leads Opportunities
Contact	<p>When deleting a contact, these linked records are also deleted:</p> <ul style="list-style-type: none"> Leads Notes Attachments <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> Accounts Activities Opportunities
Dealer	<p>When deleting a dealer, these linked records are also deleted:</p> <ul style="list-style-type: none"> Activities (along with any attachments linked to this activity) Notes Attachments
Filtered List	Filtered lists cannot be edited. To change a filtered list, delete it and create a new one.
Fund	<p>When deleting a fund, these linked records are also deleted:</p> <ul style="list-style-type: none"> Activities (along with any attachments linked to this activity) Notes Attachments
Group	When you delete a group, the system removes the reference to the group from the group's records, and the record ownership reverts to the employee in the Owner field. If that process involves a large number of records, it might take some time to complete. During that time, the system does not allow group members to create records.
Household	No child records are deleted when the household is deleted.

If you delete this	You should be aware of this
Lead	<p>When deleting a lead, these linked records are also deleted:</p> <ul style="list-style-type: none"> Activities (along with any attachments linked to this activity) Notes Attachments <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> Opportunities
Medical Event	<p>When deleting a medical event, these linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> Invitees (contacts) <p>NOTE: You cannot delete an event that has a Status of Completed.</p>
Opportunity	<p>You cannot delete an opportunity that has a Sales Stage of Closed because that information is used for historical reporting. When deleting an opportunity, these linked records are also deleted:</p> <ul style="list-style-type: none"> Leads Activities (along with any attachments linked to this activity) Notes Attachments <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> Contacts Accounts
Portfolio Account	<p>When deleting a portfolio, these linked records are also deleted:</p> <ul style="list-style-type: none"> Activities (along with any attachments linked to this activity) Attachments <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> Contacts
Product	<p>You cannot delete a product. To remove it from the list of available products your employees can link to opportunities (as products) or accounts (as assets), clear the Orderable check box on the Product Edit page.</p>
Product Category	<p>A user whose role includes the Manage Content privilege can delete product categories. When a category is deleted, the association between the product and the category is broken, but the products are retained.</p>

If you delete this	You should be aware of this
Role	<p>A user whose role includes the Manage Users and Access privilege can delete roles.</p> <p>Instead of being stored for 30 days, deleted roles are immediately purged from the system and cannot be restored.</p> <p>Before deleting a role, all users assigned to that role must be assigned to a different role. Otherwise, the application does not let you delete the role.</p>
Solution	<p>When deleting a solution, these linked records are also deleted:</p> <ul style="list-style-type: none"> ■ Solution Histories <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> ■ Service Requests ■ Solutions <p>TIP: If you believe a solution is no longer useful, but it was at one time linked to a service request, change the status to Obsolete instead of deleting it. That way, your company can prevent the solution from further use by your customer service representatives, but it is saved for historical purposes. (To determine if the solution has been used, go to the Solution Detail page, and check the Service Requests section for linked records.)</p>
Territory	<p>A user whose role includes the Manage Territories privilege can delete territories. Territories can be deleted whether or not they are associated with other territories, accounts, opportunities, and so on.</p> <p>The Territory Detail page shows the company administrator if the territory has any children or not. The company administrator can query on account, opportunity, and so on using the condition where Territory = <Territory to be deleted> to find out if the territory has any associated account, opportunity, and so on.</p>
Vehicle	<p>When deleting a vehicle, these linked records are also deleted:</p> <ul style="list-style-type: none"> ■ Activities (along with any attachments linked to this activity) ■ Notes ■ Attachments

NOTE: For further information on linked records, see [Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities](#) (on page 166).

Viewing Audit Trails for Records

On record types that support audit trails, you can view the audit trail that tracks the changes made to the audited fields on a record.

Depending on how your company administrator configures the audit trail for the record type, the audit trail can also show the following:

- An entry for the creation of the record
- If the record has been deleted or restored, an entry for each of these actions

NOTE: If a record has been deleted but has not been restored, the record itself is no longer accessible, so you cannot view the details of the delete action in the related audit trail information. However, there is an entry for the delete action in the company-wide Master Audit Trail. If the record is later restored, there is an entry for the delete action and an entry for the restore action in the company-wide Master Audit Trail and in the audit trail information on the record. To view the company-wide Master Audit Trail, you must have the Access Master Audit Trail privilege in your user role.

For changes to records, the audit trail shows the old and new values in a field, as well as the timestamp and the name of the user who made the change to the field. Your company administrator determines which fields, if any, are audited. For information about the record types that support audit trails, and a list of the fields that are audited by default, see [Customizing the Audit Trail](#) (on page 1069).

Before you begin. To enable you to view the audit trail for a record type, your company administrator must make sure that the page layouts for your role are configured to include the Audit Trail related item on the Detail page layout for the parent record type. Your company administrator must also give you read-only access to the Audit Trail related item on the parent record type. If the Audit Trail related item is still not visible on your record Detail page after the company administrator has completed the configuration, click the Edit Layout link on the record Detail page, and add the Audit Trail as a related information section. For more information on editing your Detail page layouts, see [Changing Your Detail Page Layout](#) (on page 619).

To view the audit trail for a record

- On the record Detail page, scroll down to the Audit Trail related information section.

Each row shows the date on which the record was updated and who made the update. The new and old values in the changed audited field are also shown.

NOTE: Each audit trail record of a change shows the details of one change to only one field. The audit trail records of changes are shown only for the audited fields. So, if a user saves a record after changing two fields, but only one of those fields is audited, then an audit trail record is shown for the change to the audited field only. The details of the change to the other field are not shown.

About Duplicates When Creating Records

For many record types, when you create a record, Oracle CRM On Demand warns you if that record already exists. The existing record can reside in your current company records. If you receive the duplicate error message, cancel creating the record, find the existing record, and update it.

For the following record types, Oracle CRM On Demand does not check for duplicate records when you create a new record through the user interface:

- Activity
- Account Revenue
- Assessment
- Contact
- Contact Revenue

- Custom Object 01, 02, 03, 04 and higher
- Deal Registration Product Revenue
- Household
- Lead
- Note
- Opportunity Product Revenue
- Special Pricing Product

NOTE: Before adding a new record, search the records list to make sure that the record does not already exist.

The following table lists the fields that are used to determine if a record is a duplicate when the record is created through the user interface.

NOTE: For information on what constitutes record duplication when records are imported, see [About Record Duplicates and External IDs](#) (on page 1302).

Records of This Type	Are Duplicates If All of These Fields Match
Account	Account Name and Location
Account Competitor	Competitor Name
Account Partner	Partner Name
Appointment Contact	Contact Name
Appointment User	User Name
Attachments	File Name
Business Plan	Plan Name, Type, Status, and Period
Campaign	Source Code
Campaign Recipient	Contact
Objective	Objective Name, Type, Status, and Period
Opportunity	Opportunity Name and Account
Opportunity Competitor	Competitor Name
Opportunity Partner	Partner Name
Plan Account	Account and Business Plan
Plan Contact	Contact and Business Plan Name
Plan Opportunity	Business Plan and Opportunity
Product	Product Name
Product Category	Category Name

Records of This Type	Are Duplicates If All of These Fields Match
Service Request	Service Number NOTE: The Service Number is automatically generated by Oracle CRM On Demand. No other field is considered for duplicate checking.
Solution	Title
Task Contact	Contact Name
Task User	User Name
Team	User Name
User	User ID and Company Sign In ID
Partner Relationship Management	
Accreditation	Accreditation Name
Accreditation Request	Accreditation Name, Partner Name, and Request Date
Application	Application ID NOTE: The Application ID is automatically generated by Oracle CRM On Demand. No other field is considered for duplicate checking.
Certification	Certification Name
Certification Request	Certification Name, Contact Name, and Request Date
Course	Course Name
Course Enrollment	Course Name, Candidate Name, and Enrollment Date
Deal Registration	Name and Principal Partner
Exam	Exam Name
Exam Registration	Exam Name, Candidate Name, Owner, and Exam Date
Fund	Fund ID NOTE: Oracle CRM On Demand automatically sets the Fund ID field to the Row ID of the record. No other field is considered for duplicate checking.
Fund Request	Request Name and Request Date
MDF Request	Request Name and Request Date
Partner	Partner Name and Location
Partner Program	Partner Program Name
Price List	Price List Name and Type
Price List Line Item	Price List, Product, and Type
Special Pricing Request	Request Name and Request Date

Records of This Type	Are Duplicates If All of These Fields Match
Life Sciences	
Allocation	Allocation Type, Stop Sampling, Sample, and Owner
Contact Best Time	Day, Start Time, End Time, Address, and Contact Full Name
Contact State License	License Number and Contact Full Name
Inventory Audit Report	Type, Status, Reason, Completed Date, Inventory Period, and Owner User Sign In ID
Inventory Period	Start Date, Active, Reconciled, and Owner
MedEd Event	End Date and Name
Message Response	Response, End Time, Start Time, Sequence Number, Followup, and Solution ID
Messaging Plan	Name, Disclosure Mandatory, Lock Sequence, Enable Followup, Status, Type, Product Name, and Owner
Messaging Plan Item	Disclosure Message, Sequence Number, Type, Parent Messaging Plan, and Solution Name
Messaging Plan Item Relations	Type, Parent MP Item, and Solution Name
Product Detailed	Indication and Product
Promotional Item Dropped	Quantity and Product
Sample Disclaimer	Disclaimer Text and Status
Sample Dropped	Quantity and Product
Sample Inventory	Opening Balance, Inventory Period, and Sample
Sample Lot	Lot #, Expiration Date, Orderable, and Sample NOTE: The Orderable field is on the product associated with the Sample.
Sample Transaction	Name, Date, and Type
Signature	Signature Control and Activity
Transaction Item	Quantity, Line Number, Transaction #, and Sample
Wealth Management	
Financial Account	Financial Account
Financial Account Holder	Business Account, Financial Account Holder Name, Financial Account, and Role
Financial Account Holding	Financial Account, Financial Product, and Financial Account Holdings Name

Records of This Type	Are Duplicates If All of These Fields Match
Financial Plan	Financial Account, Financial Plan Name, and Type
Financial Product	Financial Product Name
Financial Transaction	Financial Account, Financial Product, and Transaction ID
Portfolio	Account Number and Product
Insurance	
Broker Profile	Partner, Broker Profile Year, and Broker Profile Name.
Claim	Claim Number and Policy
Coverage	Coverage Name, Coverage, and Policy
Damage	Claim Number, Insurance Property, and Damage Name
Insurance Property	Type, Policy, and Sequence Number
Involved Party	Claim Number, Contact, and Role
Policy	Policy Number
Policy Holder	Policy, Role
Automotive	
Dealer	Name
Financial Information	Finance Detail # NOTE: The Finance Detail # is automatically generated by Oracle CRM On Demand. No other field is considered for duplicate checking.
Make	Make
Sales History	Sales Number NOTE: The Sales History # is automatically generated by Oracle CRM On Demand. No other field is considered for duplicate checking.
Sales Hours	Day and Open Time
Service History	SH # NOTE: The Service History # is automatically generated by Oracle CRM On Demand. No other field is considered for duplicate checking.
Service Hours	Day and Open Time
Territory	Name
Vehicle	VIN
Vehicle Contact	User Name

Printing Information That Appears on Pages

From all pages except the Edit pages, you can print the information that shows on that page. All extraneous interface elements and links are excluded when you print a page.

To print the information appearing on your page

- 1 Click the Printer Friendly link.
- 2 In the window, click the Print link.
- 3 In the Print window, adjust the preferences for your printer to ensure that it prints the page in landscape mode.

Using Landscape mode optimizes the appearance of the data on the printed page.

- 4 Follow the onscreen instructions to print the report.

Viewing Oracle CRM On Demand Service Information

The Service Information page provides information about planned and recent maintenance sessions for your Oracle CRM On Demand production environment and staging environment. The *production environment* is the environment where your company performs its work in Oracle CRM On Demand. The *staging environment* is typically a copy of the production environment that can be used for testing purposes, for example, to test configuration changes before applying them to the production environment, or to test patches before they are applied to the production environment.

The Service Information page also provides information about the availability of your Oracle CRM On Demand production environment over the last number of months.

The following procedure describes how to view Oracle CRM On Demand service information.

To view Oracle CRM On Demand service information

- Scroll to the bottom of any page in Oracle CRM On Demand, and click Service Information to open the Service Information page.

In the Service Information page, the Version Information section shows details of the version level, patches, and so on, which apply to the Oracle CRM On Demand environment where you are currently signed in. This information is used by Oracle for troubleshooting purposes. You might be asked to provide this information if you contact Oracle for assistance.

The following table describes the information shown in the Production Availability Information section of the page.

Field	Description
Month	The calendar month for which the availability information is provided.
Availability(%)	<p>The percentage of time during the specified month that the Oracle CRM On Demand production environment was available.</p> <p>NOTE: Availability information is provided approximately mid-month for the previous calendar month. On rare occasions, the availability information can be changed after it is first provided.</p>

In the Service Information page, the maintenance schedule information for the production environment and the staging environment are shown in two separate sections.

The following table describes some of the information shown in the maintenance schedule sections of the page.

Field	Description
Maintenance Date	The date for the maintenance session. Dates in the future indicate planned maintenance sessions, and they are subject to change.
Estimated Start Time	The estimated time that the session will start. The time shown is the time in your local time zone.
Estimated Duration (hrs)	An estimate of the length of time the session will take, shown in hours.
Maintenance Type	<p>The type of maintenance that was or will be performed, for example, standard maintenance or a patch installation.</p> <p>NOTE: If the date for the maintenance session is in the future, the maintenance type information is subject to change.</p>
Last Updated	The date that the information for the maintenance session was last updated.

NOTE: From the Service Information page, a Diagnostics link provides access to diagnostics information. For security reasons, the information is encrypted. If you contact Oracle for assistance, you might be asked to click the Diagnostics link and to send the encrypted information to Oracle CRM On Demand Customer Care.

Retrieving Your User Sign-In ID or Resetting Your Password

If you forget your user sign-in ID, you can submit a request from the Oracle CRM On Demand sign-in page to have the information sent to you in email. If you forget your password, you can submit a request to reset your password, also from the Oracle CRM On Demand sign-in page, provided that your user role has the Reset Personal Password privilege.

If you forget both your user sign-in ID and password, you can retrieve your user sign-in ID and then use that information, together with the security questions that you set up in Oracle CRM On Demand, to reset your password.

When retrieving your user sign-in ID or resetting your password, note the following points:

- To retrieve your user sign-in ID, you must know the primary email address that is stored on your user record in Oracle CRM On Demand. If you have problems retrieving your user sign-in ID, contact your company administrator to verify the primary email address.
- To reset your password, you must know your user sign-in ID. Therefore, if you forget both your password and your user sign-in ID, retrieve your user sign-in ID first, and then use that information to reset your password.
- To reset your password, you must know the answers to the security questions that you set up in Oracle CRM On Demand.
- Each time your user sign-in ID is sent to you, an entry is created in the audit trail on your user record.
- Each time you reset your password, an entry is created in the audit trail on your user record.

To retrieve your user sign-in ID

- 1 On the Oracle CRM On Demand sign-in page, click the Can't Access Your Account? link.
- 2 On the Select an Option page, click the I Forgot My User Sign In ID link.
- 3 Enter the primary email address that is stored on your user record in Oracle CRM On Demand, and then click Go.

Depending on the email address you enter, the following happens:

- If the email address you enter is syntactically correct, a confirmation message appears, otherwise, an error message appears.
- If the email address you enter is the correct primary address on your user record, an email containing your user sign-in ID is sent to the email address.
- If the email address you enter is syntactically correct, but is not the correct primary address on your user account, no email is sent to you. In that case, contact your company administrator to verify the correct primary email address.

NOTE: If you have more than one account in Oracle CRM On Demand, the active user sign-in ID for each account is included in the email, unless the account is configured for Single Sign-On only. If you do not know whether your account is configured for Single Sign-On only, contact your company administrator to find out.

When you receive the email containing your user sign-in ID, if you know your password, you can return to the sign-in page and sign in to Oracle CRM On Demand as usual.

NOTE: You can submit up to three requests to have your user sign-in ID sent to you in any 24 hour period.

If you forget your password, you can reset it as described in the following procedure.

To reset your password

- 1 On the Oracle CRM On Demand sign-in page, click the Can't Access Your Account? link.
- 2 On the Select an Option page, click the I Forgot My Password link.
- 3 On the Forgot Your Password page, enter your user sign-in ID, and then click Go.

If you enter the correct user sign-in ID, a confirmation message appears and you receive an email containing a temporary link to Oracle CRM On Demand.

- 4 To access Oracle CRM On Demand, click the temporary link in the email.

NOTE: Your company administrator determines how long the temporary link remains valid, as well as the number of times you can attempt to sign in using the temporary link.

- 5 On the Reset Password page, enter the answers to your security questions and click Submit.

- 6 On the Password Update page, in the New Password field, enter a new password, then enter the same new password again in the Verify New Password field.

- 7 Click Save to save your new password.

NOTE: Your company administrator determines how many times you can reset your password in a given period of time.

About Oracle CRM On Demand Session Duration

Your company administrator can specify the maximum duration for an Oracle CRM On Demand active session for your company. If your company administrator sets the maximum duration setting to 0 (zero), there is no limit to the duration of an active session.

If your interactive user session reaches the specified maximum duration, then the next time that you perform an action in Oracle CRM On Demand, such as clicking a link, tab, or button, you are returned to the sign-in page, and you must sign in again to return to the page that you were trying to access. When using Web services, if the active session times out, the Web services client must reauthenticate to continue using Web services.

About Concurrent Sessions in Oracle CRM On Demand

Your company administrator can specify whether concurrent sessions are allowed. *Concurrent sessions* occur when the same user credentials are used to sign in to Oracle CRM On Demand more than once, from different browsers, at the same time. Only interactive user sessions are counted. Connections to Oracle CRM On Demand through Web services or desktop clients are not considered when concurrent sessions are counted.

Your company administrator specifies whether concurrent sessions are allowed. The following table shows the behavior that users see when an attempt is made to sign in to Oracle CRM On Demand with user credentials that are already in use for at least one existing session, depending on the option your company administrator chooses.

Option	Behavior
Allow with Notification	<p>The new session is allowed. When the user signs in to the new session, the following happens:</p> <ul style="list-style-type: none">■ In the new session, a message appears on the Oracle CRM On Demand page to indicate that at least one other concurrent session

Option	Behavior
	<p>exists. The message contains a link that the user can click to view the sign-in history for the user.</p> <ul style="list-style-type: none"> ■ In each existing concurrent session, the next time the user performs an action in Oracle CRM On Demand, such as clicking a link, tab, or button, a message appears on the Oracle CRM On Demand page to indicate that a concurrent session has started. The message contains a link that the user can click to view the sign-in history for the user.
Allow without Notification	The new session is allowed. No notification is given in the new session or in any existing session to indicate that a concurrent session is in progress.
Prevent and Terminate Existing	<p>The new session is allowed, but the existing session is terminated. When the user signs in to the new session, the following happens:</p> <ul style="list-style-type: none"> ■ In the new session, a message appears on the Oracle CRM On Demand page to indicate that another session with the same credentials will be terminated. The message contains a link that the user can click to view the sign-in history for the user. ■ In the original session, the next time that the user performs an action in Oracle CRM On Demand, such as clicking a link, tab, or button, the user is returned to the sign-in page, where a message indicates that the session was terminated because another user signed in with the same credentials.

System Requirements for Oracle CRM On Demand

You can find details of the system requirements for Oracle CRM On Demand on the [Oracle CRM On Demand Web site](http://crmondemand.oracle.com/en/products/system-requirements/index.html) <http://crmondemand.oracle.com/en/products/system-requirements/index.html>.

Release Notes for Oracle CRM On Demand

A set of release notes is provided with each release of Oracle CRM On Demand. The release notes outline minor changes to Oracle CRM On Demand, which change the existing behavior or the user interface. The release notes are provided on the Training and Support Center Web site, which you can access by clicking the Training and Support link at the top of each page within Oracle CRM On Demand.

Contacting Oracle

Oracle offers a variety of services and welcomes your suggestions about this application. Use the following resources to:

- Suggest improvements to the product, our services, or our processes at <https://ebusiness.siebel.com/OnDemandCustomerCare/>
- Request sales collateral or information about our new products and promotions at <http://www.crmondemand.com/>
- Suggest improvements to online help by sending email to siebeldoc_ww@oracle.com

Exiting Oracle CRM On Demand

CAUTION: Before exiting Oracle CRM On Demand, explicitly save all information, and close all the open windows, such as forms for creating new records. If you are using Oracle Contact On Demand, the call center application, change your work status to Unavailable before signing out.

To exit Oracle CRM On Demand

- In the top-right corner of your Oracle CRM On Demand page, click Sign Out.

If you close the browser window to exit Oracle CRM On Demand, your session remains open until it times out. The timeout interval is usually configured for 10-15 minutes.

NOTE: To sign in as a different user, click the Sign Out link in the top right corner. If you don't explicitly sign out, the browser instance is not closed, and all views and data assume the first user is still signed in.

2 Calendar and Activities

Use the Calendar pages to review, create, and update your activities and to review and update your planned calls.

An *activity* consists of tasks you need to accomplish before a certain date and appointments you want to schedule for a specific time. Tasks and appointments can be meetings, calls, demonstrations, or events. The difference between tasks and appointments is that tasks appear in a task list and have a due date and status, whereas appointments are scheduled on your calendar with a specific date and time.

A *planned call* is a Life Sciences specific call that you create with a status of Planned in order to tentatively have a place holder for a sales call to a physician, hospital, or clinic. To distinguish between the planned calls and other appointments, activities, or scheduled calls on your calendar, the following color coding is used:

- Appointments, activities, and scheduled calls appear on your calendar in blue font.
- Planned calls; that is, calls with a status of Planned, appear on your calendar in red font.

Planned calls are not visible by default on your calendar. To see planned calls on your calendar, your user role must include the Life Sciences privilege Calls: Calendar Planned Calls.

Working with the Calendar Pages

The Calendar pages provide the main area for managing activities. The default page is the Daily Calendar page, which contains a Daily Calendar section, a Calendar View section, an Open Tasks section, and a Planned Calls section.

To see the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege. The Planned Calls section lists up to two weeks of planned calls for the sales representative in chronological order and displays the following information for each planned call: call date and start time, time of day, subject, contact to be visited, and other contact address information. The color coding used in the Planned Calls section on the Calendar pages is as follows:

- Overdue planned calls with a start time that is in the past appear in red font.
- Upcoming planned calls with a start time that is in the future appear in blue font.

For more information about creating a planned call, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126), [Dropping Samples During a Sales Call](#) (on page 469), and [Mass Call Planning](#) (on page 133).

NOTE: If your role includes the Share Calendar privilege, your Calendar pages might provide additional functionality than that listed on the default page. For more information on additional functionality, see [Calendar Settings Page](#) (on page 140).

The following table describes what you can do from the Daily or Weekly Calendar.

NOTE: Communication activities generated from Oracle Contact On Demand belong to a specific activity subtype. Therefore, they do not appear on the Calendar pages or Activity lists.

To do this	Follow these steps
Create a task	Click New in the Open Tasks title bar. On the Task Edit page, enter the task information and save the record.
Delete a task	Click the link for the task that you want to delete. On the Task Detail page, click Delete.
Create an appointment	Click New Appointment in the Calendar title bar. On the Appointment Edit page, enter the appointment information and save the record.
Delete an appointment	Click the link for the appointment that you want to delete. On the Appointment Detail page, click Delete.
Go to a specific day	Click the day link in the Calendar View section.
Go to a specific month	Click the arrows in the Calendar View section.
Mark a task as completed	In the Open Tasks section, click the Show Full List link. On the Activities List page, click the Subject link for the task you want to mark as completed. On the Task Detail page, click Mark as Completed.
Page through the Calendar day by day	Click the arrows in the Daily Calendar section.
Update an activity	Click the link for the activity (appointment, task, or planned call) that you want to update. On the Appointment Detail, Task Detail, or Call Detail page, edit the fields inline or click Edit to open the Appointment, Task, or Call Edit page. For more information on updating records, see Updating Record Details (on page 60).
View a list of appointments, tasks (open, closed, or all), activities, or planned calls	In the Open Tasks section, click the Show Full List link. On the Activities List page, click the drop-down list and change the selection.
View the day's appointments	Click the 1 icon in the Calendar.
View the details of an activity	Click the link for the activity (appointment, task, or planned call) that you want to view.
View the entire month's appointments	Click the 31 icon in the Calendar.
View the entire week's appointments	Click the 7 icon in the Calendar.

Managing Calendars and Activities

For step-by-step procedures for managing calendars and activities, see the following:

- [Viewing Activities](#) (on page 120)
- [Creating Activities](#) (on page 120)
- [Updating Activities](#) (on page 121)
- [Limiting Activity Records Displayed](#) (on page 124)
- [Marking Tasks as Completed](#) (on page 125)
- [Assigning Activities to Another Employee](#) (on page 125)
- [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Adjusting Message Responses](#) (on page 136)
- [Scheduling Appointments with Others](#) (on page 138)
- [Mass Call Planning](#) (on page 133)
- [Using Activity Assessment Scripts](#) (on page 143)
- [Reviewing Recommended Messaging Plans for Activities](#) (on page 498)

If your user role includes the Share Calendar privilege, you can also perform the following procedures:

- [Viewing Others' Calendars](#) (on page 139)
- [Sharing Your Calendar](#) (on page 141)
- [Setting Your Default Calendar View](#) (on page 141)
- [Adding Custom Calendar Views](#) (on page 142)

If your user role includes the Share Calendar privilege and your company uses the default group assignment option, you can also perform this procedure, [Viewing Group Task Lists](#) (on page 142).

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Viewing Activities

Oracle CRM On Demand keeps your activities in the forefront by showing them on several pages:

- **My Homepage**

My Homepage contains separate lists for your appointments and tasks, sorted by date.

- **Calendar**

The Calendar pages show your appointments as they would appear in an appointment book, opened to today's schedule. You can review other days by using the monthly calendars on the right or by clicking the 1, 7, and 31 icons above the appointments to see the desired calendar view.

The Daily and Weekly Calendar pages also show a list of up to ten of your tasks for the next 30 days (Due Date \leq Today +30), sorted by due date by default.

- **Detail page for record types, such as Accounts, Contacts, and so on.**

The Detail pages contain sections showing open activities and completed activities linked to a specific record.

NOTE: You can also synchronize your activity records with Oracle Offline On Demand (the Offline client) as well as with Microsoft Outlook or Lotus Notes using Oracle PIM Sync On Demand. For more information, see [Working with Other Applications](#) (on page 627).

About Managing Tasks

One way of managing tasks is to prioritize them by importance or urgency. You prioritize a task by assigning it a level, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority. You change the priority level of a task on the Task Edit page. The default priority for a task is 3-Low.

TIP: Tasks appearing in red are past their due date.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.

For information about the Group Task List tab, available for companies that use the Group feature, see [Viewing Group Task Lists](#) (on page 142).

Creating Activities

You always create an activity (task or appointment) by entering information in a form. You can access this form from different areas within the application, depending on what you are working on and what you need to do.

This section describes one method for creating an activity, which allows you to add the record while continuing with your work in the main area of the application. For a description of all the methods, see [Creating Records](#) (on page 38).

To create an activity using the Create section of the Action bar

- 1 In the Create section of the Action bar, click Appointment or Task.
- 2 In the form, enter the activity information.
For information about the fields in activity records, see [Activity Fields](#) (on page 143).
- 3 Save the record.

Related Topics

See the following topics for related information:

- [Activity Fields](#) (on page 143)
- [Working with the Calendar Pages](#) (on page 117)
- [Using the Offline Client](#) (on page 628)
- [Synchronizing with PIMs](#) (on page 637)
- [Adding Emails from Microsoft Outlook and Lotus Notes](#) (on page 654)

Updating Activities

You can update the information in the activity record, including changing the record status to completed, if you have edit access to the record.

To update activity information

- 1 Select the task or appointment.
For instructions on selecting activities, see [Finding Records](#) (on page 41).
- 2 On the Appointment or Task Detail page, edit the fields inline or click Edit to open the Appointment or Task Edit page. For more information on updating records, see [Updating Record Details](#) (on page 60).

Working with Activity Lists

The list of records that you see in the Activity List page depends on how you access the page, as follows:

- If you access the Activity List page directly from the Calendar pages, the list shows all open activities assigned to you.
- If you access the Activity List page from a record Detail page, the list shows either the open activities or closed activities linked to the record.

Activities shown in the Open Activities list accessed from a record Detail page include the following:

- All linked appointments to which you have visibility and on which the completed date and time are later than the current date and time.
- All linked tasks to which you have visibility and on which the completed date is blank.

By default, the records in the Open Activities list are sorted by the Completed Date field. Records where the Completed Date field is blank appear at the bottom of the Open Activities list. Therefore, open tasks appear at the bottom of the Open Activities list, after all open appointments. The Completed Date field is not displayed in the Open Activities list that you access from record detail pages by default, but your company administrator can add the field to the list.

Activities shown in the Closed Activities list accessed from a record Detail page include the following:

- All linked appointments to which you have visibility and on which the completed date and time on the appointment are earlier than the current date and time
- All linked tasks to which you have visibility and on which the completed date and time are earlier than the current date and time

NOTE: Visibility in the Activity List page is limited to those records where your name appears in the Owner field, the Delegated By field, or in the list of users.

From the Activity List page, you can create new activities or review multiple activities at a glance. You can edit fields inline on the Activity List page. You can also select an activity to review, update, or delete. For more information on updating records, see [Updating Record Details](#) (on page 60).

If you access the Activity List page from the Calendar pages, you can use the drop-down menu to switch to another activities list. The drop-down menu contains both standard lists distributed with the application and custom lists for your company.

NOTE: If your company administrator added you to a group, a Group Tasks tab appears on your calendar pages.

The following table describes what you can do from the Activity List page.

NOTE: If you access the Activity List page through a record Detail page, some of these features may not be available.

To do this	Follow these steps
Add activities to books or remove activities from books	On the Activity List title bar, click Menu, and select Batch Assign book. Complete the steps described in Assigning Records to Books (on page 1200).
Create a new list of activities	On the Activity List title bar, click Menu, and select Create New List. Complete the steps described in Creating and Refining Lists (on page 73).
Create a task	On the Activity List title bar, click New Task. On the Task Edit page, enter the required information and save the record.
Create an appointment	On the Activity List title bar, click New Appointment. On the Appointment Edit page, enter the required information and save the record.
Delete all records from the list	On the Activity List title bar, click Menu, and select Batch Delete. Complete the steps described in Deleting and Restoring Records (on page 100).
Export the list	On the Activity List title bar, click Menu, and select Export List. Complete

To do this	Follow these steps
	the steps described in Exporting Records in Lists (on page 81).
Find an activity (task or appointment)	Click the Subject column header to sort the data. Then click a letter in the alphabet bar. For activities beginning with numbers, click 0-9.
Manage all the activities lists	On the Activity List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page (on page 79).
Refine the search criteria for the list	On the Activity List title bar, click Menu, and select Refine List. Complete the steps described in Creating and Refining Lists (on page 73).
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a group of activity records at once	On the Activity List title bar, click Menu, and select Mass Update. Complete the steps described in Updating Groups of Records (on page 85).
Update an activity	Edit fields inline on the Activity List page or select the activity to open the Details page. For more information on updating records, see Updating Record Details (on page 60).
View a subset of activities (tasks or appointments)	On the Activity List title bar, click the drop-down list and change the selection (Completed Tasks, Open Tasks, My Tasks, or My Appointments).
View all activities (tasks and appointments)	On the Activity List title bar, click the drop-down list and select All Activities.

Standard Activity Lists

The following table describes the standard lists.

Activity List	Filters
Completed Tasks	Tasks that have a completed date in the past
Delegated Tasks - Completed	Tasks that you created and assigned to other users and that have a completed date in the past
Delegated Tasks - Open	Tasks that you created and assigned to other users and that have a blank completed date or a completed date in the future
Delegated Tasks - Overdue	Tasks that you created and assigned to other users and that are overdue
My Activities	All of your activities, including tasks and appointments
My Appointments	All of your appointments

Activity List	Filters
My Daily Calls	Referral calls, review calls, or birthday calls to make today
My Open Tasks	Your tasks on which the Completed check box is not selected and that are due to be completed in the next 90 days
My Tasks	All of your tasks
My Weekly Calls	Referral calls, review calls, or birthday calls to make this week
Open Activities	Combined list of: <ul style="list-style-type: none"> ■ Tasks assigned to you that have a blank completed date or a completed date in the future ■ Future appointments that are assigned to you
Open Tasks	Tasks on which the Completed check box is not selected and that are due to be completed in the next 90 days
Planned Calls	Your planned calls <p>NOTE: This list is specific to Oracle CRM On Demand Life Sciences Edition.</p>

Limiting Activity Records Displayed

You can limit the activities you see by selecting a filtered list. A list shows a subset of the activities that meet the criteria saved within the list.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Before you begin. When you create a list, you need to enter the fields and values for the criteria you set up. You might want to go to the Task Edit or Appointment Edit page and write down the exact field names and values as they are used in your application. Otherwise, your filtered list might not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names; however, the printout does not capture all of the available field values for drop-down lists.

To open a filtered list for activities

- 1 Click the Calendar tab.
- 2 On the Calendar Page, in the Open Tasks section, click Show Full List.
- 3 On the Activities List page, change the selection in the drop-down list.

To create a filtered list for activities

- 1 Click the Calendar tab.
- 2 On the Calendar Page, in the Open Tasks section, click Show Full List.
- 3 On the Activity Lists page, click Menu and select Manage Lists.
- 4 On the Manage Lists page, click the New List button.
- 5 Complete the steps described in [Creating and Refining Lists](#) (on page 73).

Marking Tasks as Completed

You can mark tasks as Completed. A completed task remains in certain lists, such as All Activities or My Activities. However, completed tasks do not remain on My Homepage.

If completed tasks are linked to records, they move from the Open Activities list to the Completed Activities list on the Detail page for that record.

To mark a task as Completed

- 1 Select the task.
For instructions on selecting tasks, see [Finding Records](#) (on page 41).
- 2 On the Task Detail page, click the Mark as Completed button.

Assigning Activities to Another Employee

You can assign an activity to another employee if you have edit access to the record. Generally, you can edit a record if you own it or the owner reports to you. However, access levels can be adjusted to restrict a user's access.

After you assign an activity to another employee, the activity automatically appears in the new user's My Activities or My Tasks list. Upon assignment, your name appears in the Delegated By field for the activity and the record remains visible to you. The assigned activity also maintains all prior associations for the activity. You can track tasks that you have assigned to others by using the Delegated task lists in the drop-down on your Activity Lists page.

To assign an activity to another employee

- 1 Select the activity.
For instructions on selecting activities, see [Finding Records](#) (on page 41).
- 2 On the Appointment Detail page, position your cursor in the Owner field and click the Lookup icon.

- 3 In the Lookup window, click the Select link beside the name of the new owner.
The name of the new owner appears in the Owner field on the Appointment Detail page.

Tracking Visits (Sales Calls) to Customers

NOTE: This feature is available in Oracle CRM On Demand Life Sciences Edition only.

You can do the following in the Call Detail page:

- Track visits (sales calls) to customers, recording information such as the products you discussed, the samples, promotional or educational items you left, solutions you discussed, and related contacts.
- Save the information as a template, called a *Smart Call*. The Smart Call template is helpful when you are visiting multiple customers for the same purpose, such as enrolling clinical investigators. You can keep the template private or make it available for others to use (public).

When you apply the Smart Call template to a new call, most information from the smart call automatically populates the new record, including the products detailed, promotional items dropped, and samples dropped information related to the call. However, other fields, such as Lot Numbers for the samples dropped, are not saved as part of the template.

After you apply the Smart Call template to a call, you can then update the remaining fields to track the details of this visit.

If your company administrator included the Last Call Date field on your Account or Contact Edit page, that field is automatically updated on the linked account and all linked contacts. The update occurs when you change the call record's status to Completed and save the record. The field reflects the start time and date of the call.

For more information on Smart Calls, see [Managing Smart Calls](#) (on page 1483).

- Submit the call information for use in the reconciliation process for inventory periods.

Oracle CRM On Demand Life Sciences Edition does the following once call detail information is submitted:

- Sets the Call Activity status to Submitted.
- Locks any Call Detail records with a status set to Submitted to prevent any changes or deletions of those records. For information about record locking for call activity records, see Configuration Guide for Oracle CRM On Demand Life Sciences Edition.
- Creates a disbursement transaction that is used in the reconciliation process for the Inventory Period. For more information, see [Reconciling an Inventory Period](#) (on page 449), [Process of Reconciling the Inventory](#) (on page 453), [Viewing Disbursement Transactions](#) (on page 467).

To track a visit (sales call) to a customer

- 1 Go to the Accounts or Contacts Homepage.
- 2 Select the account or contact for your visit.

For instructions on selecting records, see [Finding Records](#) (on page 41).

NOTE: You can plan a visit (sales call) for up to twenty five customers at one time by using the mass call planning feature in Oracle CRM On Demand. For more information about creating a planned call for multiple customers, see [Mass Call Planning](#) (on page 133).

- 3 On the Account Detail or Contact Detail page, scroll down to the Calls section, and click New Call or Auto Call to create a new call record.

NOTE: If the Calls section is not visible on your Details page, click the Edit Layout link in the upper-right corner of the page, and add the Calls section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- Clicking New Call brings you to the Call Edit page where you must enter most information manually for the new call record.

Make sure that you specify Call in the Type field. Otherwise, the following related items will not be available to you: Samples Dropped, Promotional Items, Products Detailed.

- Clicking Auto Call brings you to the Call Detail page where the following field data is filled automatically in for the new call record:

- The Status field has a value of Planned.
- The End Date field has a value equal to the Start Date plus 30 minutes.
- The Subject field has a value of Automated Call, and it shows the Account or Contact name.
- The Type field has a value of Call.

WARNING: Oracle CRM On Demand Life Sciences customers must not attempt to disable or customize Type=Call.

- 4 On the Call Edit or Call Detail page, do the following:

To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.

- a Enter or update the information.

The following table provides additional information regarding some fields.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help. Custom fields that your company administrator defined are saved in the Smart Call template.

Field	Description
Key Call Information	
Subject	Limited to 100 characters. The name of the Smart Call template.
Primary Contact	<p>Automatically populated and read-only.</p> <p>If this call is linked to both an account and contact, the call record appears as related information on both the Account and Contact Detail pages.</p> <p>NOTE: This field is not copied to the new record when you create a new call record from a smart call template.</p>

Field	Description
Account	<p>Automatically populated and read-only.</p> <p>If this call is linked to both an account and contact, the call record appears as related information on both the Account and Contact Detail pages.</p> <p>NOTE: This field is not copied to the new record when you create a new call record from a smart call template.</p>
Address	<p>Displays the full address, which is taken from the individual address fields for the account or contact record.</p> <p>NOTE: This field is not copied to the new record when you create a new call record from a smart call template.</p>
Smart Call	<p>If your user role includes the privilege, you can select a Smart Call template.</p> <p>NOTE: This field is not copied to the new record when you create a new call record from a smart call template.</p>
Status	<p>Status of visit (call), which can be one of the following: Assigned, Completed, Deferred, In Call, In Chat, In Progress, Not Started, Planned, Signed, Submitted, Waiting for Someone Else.</p> <p>When the status is Planned, the call appears on the Calendar highlighted in red font, and in the Planned Calls section on the Calendar pages. To see planned calls on the Calendar and in the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege.</p> <p>NOTE: This field is not copied to the new record when you create a new call record from a smart call template.</p>
Activity Currency	You can select a different currency to convert the price to another currency, if your company administrator set that feature up.
Objective	Limit of 1,500 characters
Start Time	<p>Date and time the call starts. Defaults to today's date and 12:00 p.m.</p> <p>NOTE: This field is not copied to the new record when you create a new call record from a smart call template.</p>
Duration	<p>Calculated field (in minutes) based on start time and end time.</p> <p>NOTE: This field is not copied to the new record when you create a new call record from a smart call template.</p>
End Time	<p>Defaults to start time plus 30 minutes.</p> <p>NOTE: This field is not copied to the new record when you create a new call record from a smart call template.</p>
Type	<p>Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Personal, Presentation, Other, or To Do.</p> <p>To perform samples management, you must choose Call.</p>

Field	Description
Call Type	Displays Account Call, Professional Call, or General Call, depending on the type of call. Read-only. To perform samples management, the call type must be either Account Call or Professional Call.
Ref #	Text field that can be used to store the reference number of a related item such as a signed document. NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Additional Information	
Cost	NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Paper Sign	NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Private	NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Description	Limit of 16,350 characters.
Next Call	Limit of 1,500 characters. NOTE: This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.

5 Save the record and, if required, add line items to the call record.

- On the Call Edit page, click Save, then add line items to the call on the Call Detail page.
- On the Call Detail page, add line items to the call, and then click either Save as a Private Smart Call or Save as a Public Smart Call.

For more information about adding line items to a call record and about saving call information, see the tasks that follow.

The following procedure describes how to link product detailed information to a call record.

To link product detailed information to a call record

- 1** On the Call Detail page, scroll down to either the Available Products for Detailing section or the Products Detailed section.

NOTE: If the section that you want is not visible on the Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- a** In the Available Products for Detailing section, enter the required information in the Indication, Priority (optional), and Issues (optional) fields.

Only products of category type Products Detailed, which have been allocated to the sales representative and are active on the current date, are visible in the available products list to link to the call record.

- b** In the Products Detailed section, click New and enter the required information on the Product Detailed Edit page.

NOTE: Product Detailed fields are copied over to the new record when you create a new call record from a smart call template.

Field	Description
Key Product Detailed Information	
Product Category	<p>The product category, as defined by the product administrator at the company. (View only.) For example, it can be one of the following:</p> <ul style="list-style-type: none"> ■ Samples Dropped ■ Promotional Item Dropped ■ Products Detailed
Product	<p>The name of the product (for example, a medical device), discussed or demonstrated to the customer. Select the item using the Lookup selector. (Required.)</p> <p>NOTE: Only products of the category type Samples Dropped, Promotional Item Dropped, or Products Detailed, which have been allocated to the sales representative, are present in the sales representative's inventory (in the case of samples and promotional items), and are active on the current call date can be linked to a call record.</p> <p>For information on setting up products, see Setting Up Company Products (on page 1470) and Product Fields (on page 479).</p>
Priority	Optional field for customer use.
Indication	The condition that the product addresses. Examples are: Allergy, Asthma, Arrhythmia, Heart Failure, and so on. Use the drop-down list to select an indication. (Required.)
Issues	Optional field for customer use. Examples include: Side Effects, Efficacy, Cost versus Generics, Price, and so on. Use the drop-down list to select an issue.

- 1** Save the record.

Repeat these steps, as required, to add more Product Detailed line items to the call record.

The following procedure describes how to link samples dropped information to a call record.

To link samples dropped information to a call record

- 1** On the Call Detail page, scroll down to either the Available Samples for Drop section or the Samples Dropped section.

NOTE: If the section that you want is not visible on the Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- a** In the Available Samples for Drop section, enter the required information in the Quantity field.

Only products of category type Samples Dropped, which have been allocated to and are present in the sales representative's inventory, are visible in the available samples list to link to the call record.

- b** In the Samples Dropped section, click New and enter the required information on the Samples Dropped Edit page.

NOTE: Samples dropped fields are copied over to the new record when you create a new call record from a smart call template *except* for Lot #.

Field	Description
Key Sample Dropped Information	
Product Category	<p>The product category, as defined by the product administrator at the company. (View only.) For example, it can be one of the following:</p> <ul style="list-style-type: none"> ■ Samples Dropped ■ Promotional Item Dropped ■ Products Detailed
Product	<p>The name of the product sample dropped (for example, a new drug that has come on the market), dropped off to the contact. Select the item using the Lookup selector. (Required.)</p> <p>NOTE: Only products of the category type Samples Dropped, Promotional Item Dropped, or Products Detailed, which have been allocated to the sales representative, are present in the sales representative's inventory (in the case of samples and promotional items), and are active on the current call date can be linked to a call record.</p> <p>For information on setting up products, see Setting Up Company Products (on page 1470) and Product Fields (on page 479).</p>
Lot #	<p>The lot number for the sample product selected.</p> <p>NOTE: This is relevant only if using lot numbers to track samples in the inventory. When adding or updating a sample drop record, only sample lots that have the Inventory by Lot check box selected can be entered in this field. For more information, see Sample Lots (on page 486) and Sample Lot Fields (on page 488).</p>
Quantity	<p>The number of sample items dropped off to the contact. The quantity must be a number from 1 to 9998.</p>

- 1** Save the record.

Repeat these steps, as required, to add more Samples Dropped line items to the call record. For additional information on samples dropped, see [Dropping Samples During a Sales Call](#) (on page 469).

The following procedure describes how to link promotional items, educational items, or other marketing items to a call record.

To link promotional items, educational items, or other marketing items to a call record

- 1** On the Call Detail page, scroll down to either the Available Promotional Items for Drop section or the Promotional Items section.

NOTE: If the section that you want is not visible on the Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- a** In the Available Promotional Items for Drop section, enter the required information in the Quantity field.

Only products of category type Promotional Item Dropped, which have been allocated to and are present in the sales representative's inventory, are visible in the available promotional items list to link to the call record.

- b** In the Promotional Items section, click new and enter the required information on the Promotional Item Dropped Edit page.

NOTE: Promotional Item fields are copied to the new record when you create a new call record from a smart call template.

Field	Description
Key Promotional Items Dropped Information	
Product	<p>The name of the promotional item (for example, a pen or golf ball) or educational item (for example, a white paper or a manual), dropped off to the contact. Select the item using the Lookup selector. (Required.)</p> <p>NOTE: Only products of the category type Samples Dropped, Promotional Item Dropped, or Products Detailed, which have been allocated to the sales representative, are present in the sales representative's inventory (in the case of samples and promotional items), and are active on the current call date can be linked to a call record.</p> <p>For information on setting up products, see Setting Up Company Products (on page 1470) and Product Fields (on page 479).</p>
Quantity	The number of promotional or educational items dropped off to the contact. The quantity must be a number from 1 to 9998.
Max Per Allocation	The maximum quantity of promotional items allowed to drop during the allocation period.
Product Category	<p>The product category, as defined by the product administrator at the company. (View only.) For example, it can be one of the following:</p> <ul style="list-style-type: none"> ■ Samples Dropped ■ Promotional Item Dropped ■ Products Detailed

Field	Description
Call Date	The date of the customer call. (View only.)
Max per Call	The maximum quantity of promotional items allowed to drop for a call. (View only.)
Calculated Sum of Quantity Allocation	The total quantity of promotional items dropped (so far) during the allocation period. (View only.)

1 Save the record.

Repeat these steps, as required, to add more Promotional Items line items to the call record.

The following procedure describes how to save call information as a template.

To save the call information as a template

■ On the Call Detail page, click the appropriate button:

- **Save as Private Smart Call.** Restricts the template for your use only.
- **Save as Public Smart Call.** Adds the template to the list for others to use.

NOTE: Each time you click the button, the record is saved as a separate smart call. The application remains open on this page.

The following procedure describes how to submit call detail information for inventory tracking.

To submit the Call Detail information for inventory tracking

■ When all of the information has been entered and saved on the Call Detail page, click Submit (at the top of the Call Detail page) to submit the information as a disbursement transaction used in the samples management processing.

Mass Call Planning

You can create a planned call for one or more customers in the following ways:

■ From the Account Detail or Contact Detail page with a status of Planned.

For more information about creating a planned call for a customer from the Account Detail or Contact Detail page, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126).

■ From the Account List or Contact List page using the mass call planning feature.

For more information about creating a planned call for multiple customers from the Account List or Contact List page using the mass call planning feature, see the following procedures.

When planning calls, note the following:

■ When the status of your call is set to Planned, the call appears on the Calendar highlighted in red font and in the Planned Calls section on the Calendar page.

The Planned Calls section on the Calendar page lists up to two weeks of planned calls in chronological order for the sales representative and displays the following information for each planned call: call date and start time, time of day, subject, contact to be visited, and other contact address information.

The color coding used in the Planned Calls section on the Calendar page is as follows:

- Overdue planned calls with a start time that is in the past appear in red font.
- Upcoming planned calls with a start time that is in the future appear in blue font.

NOTE: To see planned calls on the Calendar and the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege.

- When the status of your call is set to anything other than Planned, the call appears on the Calendar highlighted in blue font.

You can create a planned call for up to 25 customers by using the mass call planning feature in Oracle CRM On Demand. Use the following procedure to create a planned call for multiple contacts.

To create a planned call for multiple contacts at one time

- 1 Go to the Contacts Homepage.
- 2 Select the contact list that you want in the Contact Lists section of the page.
- 3 On the Contact List page, click Menu, and select Mass Call Planning.
- 4 On the Planned Calls page, enter the following information for each contact that you want to include in your mass call plan:
 - Enter the day of the week that you plan to call.
The valid options are: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.
 - Enter the best time to call.
The valid options are: Early Morning (7 to 9 am), Morning (9 to 11 am), Mid Day (11 am to 1 pm), Early Afternoon (1 to 3 pm), Afternoon (3 to 5 pm), Early Evening (5 to 7 pm), Late Evening (7 to 9 pm), and Late Night (9 to 11 pm).

- 5 Click Finish.

On the Calendar page, all the planned calls are now visible on the Calendar in red font and in the Planned Calls section of the page, provided your user role includes the Calls: Calendar Planned Calls privilege. An information message displays above the Calendar indicating the number of planned calls that were created.

- 6 Click the appropriate link on the Calendar or the appropriate Subject link in the Planned Calls section of the Calendar page to open the Call Detail page.

The following field data is filled in automatically for each new call record created through mass call planning:

- The Status field has a value of Planned.
- The Start Date has a value that combines the Day of the Week and Best Time to Call.

- The End Date field has a value equal to the Start Date plus 30 minutes.
- The Subject field has a value of Professional Call plus the Contact Name for calls created from the Contact List, or Account Call plus the Account Name for calls created from the Account List.
- The Type field has a value of Call.

7 Enter or update the information in the remaining fields on the Call Detail page as required.

For example, to populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.

For more information about the fields on the Call Detail page, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126).

8 If required, add line items to the call record, and then click either Save as a Private Smart Call or Save as a Public Smart Call.

You can link product detailed information, samples dropped information, and promotional items to the call record. For more information about adding line items to a call record, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126).

Use the following procedure to create a planned call for multiple accounts.

To create a planned call for multiple accounts at one time

1 Go to the Accounts Homepage.

2 Select the account list that you want in the Account Lists section of the page.

3 On the Account List page, click Menu, and select Mass Call Planning.

4 On the Planned Calls page, enter the following information for each account that you want to include in your mass call plan:

- Enter the day of the week that you plan to call.

The valid options are: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.

- Enter the best time to call.

The valid options are: Early Morning (7 to 9 am), Morning (9 to 11 am), Mid Day (11 am to 1 pm), Early Afternoon (1 to 3 pm), Afternoon (3 to 5 pm), Early Evening (5 to 7 pm), Late Evening (7 to 9 pm), and Late Night (9 to 11 pm).

5 Click Finish.

On the Calendar page, all the planned calls are now visible on the Calendar in red font and in the Planned Calls section of the page, provided your user role includes the Calls: Calendar Planned Calls privilege. An information message displays above the Calendar indicating the number of planned calls that were created.

6 Click the appropriate link on the Calendar or the appropriate Subject link in the Planned Calls section of the Calendar page to open the Call Detail page.

The following field data is filled in automatically for each new call record created through mass call planning:

- The Status field has a value of Planned.
- The Start Date has a value that combines the Day of the Week and Best Time to Call.
- The End Date field has a value equal to the Start Date plus 30 minutes.
- The Subject field has a value of Professional Call plus Contact Name for calls created from the Contact List, or Account Call plus Account Name for calls created from the Account List.
- The Type field has a value of Call.

7 Enter or update the information in the remaining fields on the Call Detail page as required.

For example, to populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.

For more information about the fields on the Call Detail page, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126).

8 If required, add line items to the call record, and then click either Save as a Private Smart Call or Save as a Public Smart Call.

You can link product detailed information, samples dropped information, and promotional items to the call record. For more information about adding line items to a call record, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126).

Related Topics

See the following topics for related information:

- [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126)
- [Dropping Samples During a Sales Call](#) (on page 469)

Adjusting Message Responses

A *message response* is feedback received from the audience during the presentation of a messaging plan during a particular period. The feedback is based on mouse clicks or taps of a tablet pen made by the presenter. Such feedback is collected continuously throughout a messaging plan delivery and is tracked by time and the specific messaging plan item being presented. For more information on messaging plans, see [Messaging Plans](#) (on page 495).

The message responses that are displayed are collected and populated from the PCD delivery software. The responses that are relevant to past interactions must be displayed in Oracle CRM On Demand. The modification privileges to these responses must be granted only to administrative persons who have authority to retroactively adjust message-plan responses.

Your user role must include the Manage Personalized Content Delivery privilege to work with the Message Response pages.

NOTE: This feature is available in Oracle CRM On Demand Life Sciences Edition only.

To adjust a message response

- 1 From either a Call Detail page or Solution Detail page, scroll to the Message Responses related item section, and click New.

NOTE: If you do not see the Message Responses section in your Call Detail page or Solution Detail page, add this section as described in [Changing Your Detail Page Layout](#) (on page 619), or contact your company administrator.

- 2 From the Message Response Edit page, view and adjust the following fields, if required.

Field	Description
Key Message Response Information	
Messaging Plan	The messaging plan being shown for a given message response. Click the Selector icon to choose an existing messaging plan.
Sequence	The sequence number of the messaging plan item corresponding to a particular response. (Required field.)
Messaging Plan Item	This field identifies the specific messaging plan item being shown with the messaging plan.
Solution	The underlying multimedia or graphic file content which is the subject of the response. (Required field.)
Response	The preconfigured values for responses are as follows: Continue Discussion, Need Data, Accepted, Not Interested, or Rejected. Select a value from the drop-down list. (Required field.)
Notes	Additional descriptive information about the response.
Section	A component of a presentation item (for example, a graph) that might be activated during a presentation by the presenter. This component is the subject of a given response value.
Start Time	The beginning of the response period when the first message response was received. To adjust, click the calendar icon to select the start date and time. (Required field.)
End Time	The end of the response period when the last message response was received. To adjust, click the calendar icon to select the end date and time. (Required field.)
Duration	The period (in seconds) between the start time and end time.
Followup	The presenter selects this check box during the presentation of a messaging plan to indicate that a follow-up request has been submitted for a particular segment of the messaging plan. (A follow-up request can include sending literature, and so on.) This field is required and is not selected by default.

- 3 Save the record if you have adjusted any of the fields.

Scheduling Appointments with Others

When you want to schedule an appointment and notify others of the appointment, follow this sequence:

- 1 Create an appointment.

- 2 Invite contacts and users.

When scheduling appointments with others, the application distinguishes between:

- **Contacts.** Customers, partners, and so on who are listed in your company information as contact records.
- **Users.** Oracle CRM On Demand users at your company.

- 3 Check the users' availability

You can view availability of users, but not contacts, since you do not have access to calendars that reside outside of the application.

NOTE: To perform this step, your user role must include the Share Calendar privilege.

- 4 Send notification of the appointment to all invitees.

To add invitees to the appointment

- 1 Create the appointment; fill in the appointment information, and save the record.

- 2 On the Appointment Detail page, scroll down to the Contacts section and click Add.

NOTE: You might have to add the Contact and User sections to your layout. For instructions, see [Changing Your Detail Page Layout \(on page 619\)](#).

- 3 In the Lookup window, select an existing contact, or click New and create the contact record.

The selected contacts appear in alphabetical order.

- 4 Click OK.

NOTE: To change which contact appears as the Primary Contact, click the Edit link beside the appointment on the Calendar page. On the Appointment Edit page, click the Lookup icon beside the Primary Contact field, select the new primary contact, and click Save. The primary contact appears in the Calendar summary. The new primary contact is also added to the Contacts section of the Appointment Detail page, if it was not already there.

- 5 On the Appointment Detail page, scroll down to the Users section and click Add.

- 6 In the Lookup window, select the users you want to invite to the appointment.

The list that appears in the Lookup window contains all Oracle CRM On Demand users at your company.

- 7 Click Save.

To check the users' availability

- 1 On the Appointment Detail page, click User Availability.

For the User Availability button to appear, your user role must include the Share Calendar privilege.

A combined calendar appears showing the list of users and their calendars. Rows for users who have not shared their calendar with you appear as blank bars.

To view information about busy time shown on the calendar, hover over the appointment with your mouse.

- 2 To view the availability on another day, you can:
 - Click the arrows in the calendar header to scroll to the next or previous day
 - Click the calendar icon in the calendar header
- 3 Update the appointment date and time, if necessary.
- 4 Save the record.

CAUTION: No warning message appears if you create an overlapping appointment.

To send an email notification to the invitees (contacts and users)

- 1 On the Appointment Detail page, click Send Email.
- 2 An email opens with this information:
 - **To.** Invitees (contacts and users)

If your list exceeds 70 invitees, the email is sent to the remaining invitees, but their email addresses do not appear in the To line.
 - **Subject.** The word *Appointment* followed by the field values for subject, location, date, start time, date, and end time.

Viewing Others' Calendars

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

You can view:

- Another user's calendar

You can view the individual calendars of users in your group (if you are a member of a group) or who report to you, and the calendars of other users who explicitly share their calendar with you.
- A group calendar (if you are a member of a group) that combines the calendars of all the members of your group into a single calendar view

NOTE: The list shows the users in alphabetical order. If the list exceeds ten users, scroll through the list to view the additional users' calendars.

For more information about groups, see [Group Management](#) (on page 1204).

■ Custom views that combine other users' calendars

For example, you might be working on a special short-term project with a number of users in different functions. Setting up a custom view that includes calendars for only those users allows you to see the schedule for those users in a single view. When you set up a custom calendar view, you can add the following users to the view:

- Users who are members of your group (if you are a member of a group)
- Users who explicitly share their calendar with you or one of your subordinates

For more information on setting up custom calendar views, see [Adding Custom Calendar Views](#) (on page 142).

The calendars show the times in your local time zone, from 7 a.m. to 7 p.m. Also, only invitees and owners of appointments can view the details for private appointments.

To view another user's calendar

- 1 On the Calendar page, click the User tab, if necessary.
- 2 In the title bar, click the Lookup icon and click the Last Name of the user in the Lookup window.
That user's calendar populates the User view.

NOTE: Only users who share their calendars with you, and users who are members of your group, are available to select.

To quickly return to your own calendar

- Click the My Calendar button in the title bar.

To view a combined calendar for all group members

- 1 On the Calendar page, click the Group tab.
- 2 On the combined calendar, you can:
 - Click the user's name to go to the user's personal calendar.
 - Click the date to go to the group view for that day.

Related Topics

See the following topic for related information about custom calendar views:

[Adding Custom Calendar Views](#) (on page 142)

Calendar Settings Page

Click a topic to see instructions for doing the following from the Calendar Settings page:

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- [Sharing Your Calendar](#) (on page 141)
- [Setting Your Default Calendar View](#) (on page 141)
- [Adding Custom Calendar Views](#) (on page 142)

NOTE: The calendar functions only according to the Gregorian calendar. It cannot be configured for other calendar systems.

Sharing Your Calendar

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

To extend access to your calendar beyond your group members, you need to explicitly share the calendar to the other user.

To share your calendar

- 1 On the Calendar pages, click Calendar Setup.
- 2 On the Calendar Settings page, click Share Calendar.
If you are a member of a group, the members of your group are listed in the Default Sharing section.
- 3 In the My Calendar Share List section, click Add Users.
- 4 On the Shared Calendar page, select the users with whom you want to share your calendar.
- 5 Save your changes.

Setting Your Default Calendar View

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

You can set which default view you want to display whenever you click the Calendar tab.

To set your default calendar view

- 1 On the Calendar pages, click Calendar Setup.
- 2 On the Calendar Settings page, click Default Calendar View.
- 3 On the Default Calendar Settings page, select a calendar view.
- 4 Save your changes.

Adding Custom Calendar Views

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

If you are a member of a group (and your role has the Share Calendar privilege), you can automatically view a merged calendar that combines the calendars of all the members in your group into a single calendar view. However, you might want to set up different, combined calendar views to meet your specific needs. To set up combined calendar views, add a custom view.

For example, you might be working on a special short-term project with a number of users across functions. Setting up a custom view that includes calendars for only those users allows you to see the schedule for those users in a single view. When setting up a custom calendar view, you can add the following users to the view:

- Users who are members of your group (if you are a member of a group)
- Users who explicitly share their calendar with you

NOTE: Custom views do not allow you to change the starting day for the week or the starting time for the day.

To add a custom calendar view

1 On the Calendar pages, click the Calendar Setup link.

2 On the Calendar Settings page, click Manage Group Views.

On the Manage Views page, your group name appears in the Standard Views section.

3 Click Add.

4 On the Manage View page, enter a name and description of the view.

NOTE: You cannot select an entire group to share calendars with; instead, you need to add each member of that group as a user to a custom view.

5 Save the record.

6 On the Manage Views page, click the Name of the new group.

The Manage View Detail page appears.

7 Click Add Members, and select the users.

8 Save the record.

On the Calendar Group tab, your new view appears in the drop-down list.

Viewing Group Task Lists

If your company uses the group assignment option, you can view the consolidated list of tasks owned by members in your group. For more information about groups, see [Group Management](#) (on page 1204).

To view the group tasks lists

- 1 On the Calendar page, click the Group Tasks tab.
- 2 From the drop-down list, select the list of tasks you want to view.

The lists of tasks include any tasks created by a member of your group (except tasks that users have marked as private).

Using Activity Assessment Scripts

Your company administrator might have set up assessment scripts to help you to gather information about and evaluate activities, such as tasks, appointments, and sales calls. An *assessment script* consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

NOTE: Smart Calls do not have Activity Assessments enabled at this time.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see [About Assessment Scripts](#) (on page 1477).

To use an activity assessment script

- 1 Select the activity.

For more information about selecting activities, see [Finding Records](#) (on page 41). For more information about activities, see [Calendar and Activities](#) (on page 117).

- 2 On the Detail page (Call, Appointment, or Task Detail page) for the activity, scroll down to the Activity Assessment section, and click Add.

NOTE: If the Activity Assessment section is not shown, click the Edit Layout link.

- 3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.

- 4 On the Activity Assessments page, select the answer for each script question, and click Save.

The Detail page (Call, Appointment, or Task Detail page) for the activity appears again.

Depending on the outcome of the script, some of the fields on the record might have been updated automatically.

Activity Fields

Use the Task Edit page to add a task or update details for an existing task. Use the Appointment Edit page to add an appointment or update details for an existing appointment. Use the Call Edit page to update the details of an existing planned call. The Edit pages show the complete set of fields for a task or appointment.

TIP: You can also edit the activities on the Activities List page and on the Appointment, Task, and Call Detail pages. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields available on the Task and Appointment Edit page. For more information about the fields available on the Call Edit page, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126).

Field	Description
Account	Account linked to this activity.
Approval Status	The approval status of the record when the task is created. This field does not appear by default. Company administrators can add this field to the Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task (on page 1228). For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Call Result	The result for the activity type Birthday Call, Referral Call, or Review Call, such as No Reach, Appointment, Stay in Touch, or Dead File. When you enter a value in this field it becomes read-only.
Campaign	The campaign that is linked to this activity.
Completed Date	<p>The date and time when the activity was completed. For tasks, this field is automatically populated when the Status field is set to Completed or the Mark as Completed button is clicked.</p> <p>For appointments, if the Completed Date is left blank, it is automatically set to the same value as the End Time field when the appointment is created and saved. If the Completed Date field is not configured as a read-only field, then you can enter a date in this field that is different from the end date for the appointment. However, if you later change the value in the End Time field, then the value in the Completed Date field is also automatically changed to the new value in the End Time field. Also, changing the date in the Completed Date field does not result in the Completed check box for the appointment being selected, or the Status field being set to Completed, even if the new date is in the past.</p> <p>The Completed Date field can never be left blank on appointments because Oracle CRM On Demand uses this field to determine which appointments to include in the Open Activities lists that appear in several areas in Oracle CRM On Demand. If you clear the value from the Completed Date field on an appointment, then Oracle CRM On Demand automatically resets the field to the same value as the End Time field.</p>
Completed	For tasks, this check box is automatically selected when the Status field on the task is set to Completed. For appointments, this check box is not selected automatically when the Status field on the appointment is set to Completed.

Field	Description
Primary Contact	Primary contact linked to this activity. For companies using the Group feature, this contact is the Primary Contact on the Calendar views.
Delegated By	The user who created the task and then assigned it to another owner. This field is automatically populated when it has been assigned to another owner.
Description	Additional information about this activity. Limit of 16,350 characters.
Due Date	Date this task is due (applies only to tasks).
End Time	<p>The date and time the appointment concludes (applies only to appointments). Defaults to today's date and 1:00 p.m. Oracle CRM On Demand automatically updates this field, using the start time and duration of the appointment.</p> <p>If you leave the Completed Date field on an appointment blank, then the Completed Date is automatically populated with the value from the End Time field. If you change the value in the End Time field, then the value in the Completed Date field is also automatically changed to the new value in the End Time field.</p>
Lead	Lead linked to this activity.
Location	Place where the appointment takes place (applies only to appointments).
Opportunity	Opportunity linked to this activity.
Owner	Owner of this activity.
Priority	<p>The priority level, such as 1-High, 2-Medium, or 3-Low. The priority level applies only to tasks. The default value is 3-Low.</p> <p>NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.</p>
Private	Indication that the activity record can be seen only by you even if the activity is linked to a record visible to others. When synchronizing with Microsoft Outlook, you can set up a filter for excluding Private records from being uploaded to Oracle CRM On Demand using this field. For more information, see Synchronizing with PIMs (on page 637).
Reject Reason	Indicates why an item was returned or rejected. This field does not appear by default. Company administrators can add this field to Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task (on page 1228). For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Service Request	Service request linked to this activity.
Start Time	Date and time the appointment starts (applies only to appointments). Defaults to today's date and 12:00 p.m.

Field	Description
Status	The status of the task or appointment, such as Completed, Deferred, In Progress, Waiting For Someone Else, or Not Started.
Subject	Title or short description of this activity.
Sub Type	The object type of the approval. This field does not appear by default. Company administrators can add this field to Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task (on page 1228). For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Type	For tasks, this refers to a category, such as Approval, Birthday Call, Call, Correspondence, Demonstration, Email, Event, Fax, Lunch, Meeting, Personal, Presentation, Other, Referral Call, Review Call, or To Do.
Type	On the Activities List page, this refers to the type of activity, either Task or Appointment.

3 Marketing

Oracle CRM On Demand provides the following record types for marketing information:

- **Campaigns.** Use these pages to manage marketing campaigns and to generate qualified leads and opportunities.
- **Leads.** Use these pages to track leads for new sales opportunities and to automate the lead conversion process.

Managing Marketing

To manage marketing, perform the following processes.

- 1 [Process of Handling Campaigns](#) (on page 147).
- 2 [Process of Handling Leads](#) (on page 148).

Process of Handling Campaigns

To handle campaigns, perform the following tasks:

- 1 Create a campaign record, see [Creating Records](#) (on page 38) and [Campaign Fields](#) (on page 154).
- 2 Assign campaign recipients, see [Targeting Contacts for Campaigns](#) (on page 152).
- 3 If this is an email campaign, prepare the email content. For more information, see Oracle Email Marketing On Demand Online Help.
- 4 Execute the campaign.
- 5 Track campaign responses, see [Recording Responses to Campaigns](#) (on page 152).
- 6 Measure campaign effectiveness, see [Measuring Campaign Effectiveness](#) (on page 154).

- 7 Associate leads with the campaign. If the campaign generates leads, you must associate the new leads with the campaign from which they came, see [Creating Records](#) (on page 38) and [Leads Fields](#) (on page 170).

Process of Handling Leads

To handle leads, perform the following tasks:

- 1 Set up lead assignment rules, see [About Assignment Rules](#) (on page 1253) and [Setting Up Assignment Rules](#) (on page 1257).
- 2 Set up lead conversion rules, see [Leads](#) (on page 156) and [Mapping Additional Fields During Lead Conversion](#) (on page 1264).
- 3 Set up lead conversion layouts, see [Creating Lead Conversion Layouts](#) (on page 1264).
- 4 Create lead qualification scripts, see [Using Lead Qualification Scripts](#) (on page 164).
- 5 Qualify the lead, see [Qualifying Leads](#) (on page 164).
- 6 Convert or reject the lead.

You can convert leads to account, contact, deal registration, or opportunity records, see [Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities](#) (on page 166). If you decide that a lead is not valuable, you can remove it from the lead management process, see [Rejecting Leads](#) (on page 169).

Campaigns

Use the Campaign pages to create, update, and track campaigns. A *campaign* is the vehicle or project in which you convey a marketing message to one or more groups of people, including existing and potential customers. Typically, campaigns deliver a promotional offer to different channels of communication to retain current customers or to acquire new customers. The goal is to generate additional interest in company products and services.

Using campaigns enables you to do the following:

- Store campaign information such as budgeted costs compared with actual costs, targeted leads, and marketing material (for example, brochures and artwork) in one place.
- Share views of campaigns with the marketing team and share consistent campaign information with your sales team from the same location in real time.
- See your campaign results by viewing leads and opportunities, which are generated for each campaign.
- Use prebuilt reports to measure the results and determine the return on investment of your campaign activities in real time.
- Make historical comparisons between current and past campaigns to identify trends.

Sales and marketing managers can import leads and link them to an existing campaign. Lead information must first be formatted in a comma-separated value (.csv) file.

Campaigns, Leads, Opportunities, and Contacts

During a campaign, you can generate multiple leads that are linked to the campaign. If you convert some of those leads to new opportunities, contacts, or accounts, the link to the campaign is carried over from the originating leads to the converted opportunities, contacts, and accounts. For example, Campaign A creates 100 leads, L1 through L100. You link each of these leads to Campaign A. Leads L1 through L90 never show potential for producing revenue. Leads L91 through L100 do show revenue potential, so you convert them to opportunities O1 through O10. Each of these opportunities is automatically linked to Campaign A by way of its originating lead. Several months later, you want to review the effectiveness of Campaign A. You view the Campaign A record and see that there are 100 leads and 10 opportunities linked to it. You can compare these results to past campaigns or to your expectations for this campaign, and make adjustments accordingly.

NOTE: If your company administrator adds custom fields for leads, those fields are not carried over to the opportunity records when the lead is converted to an opportunity or contact. An exception occurs if your company administrator sets up additional mapping through the Lead Conversion Mapping feature. For more information about mapping lead fields, see [Mapping Additional Fields During Lead Conversion](#) (on page 1264).

Working with the Campaign Homepage

The Campaign Homepage is the starting point for managing campaigns.

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

Creating a Campaign

You can create a campaign by clicking the New button in the My Recently Viewed Campaigns section. For more information, see [Creating Records](#) (on page 38) and [Campaign Fields](#) (on page 154).

Working with Campaign Lists

The Campaign Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for campaigns.

Campaign List	Filter
All Active Campaigns	Campaigns where the Status field is set to Active
All Completed Campaigns	Campaigns where the Status field is set to Completed
All Planned Campaigns	Campaigns where the Status field is set to Planned
Recently Created Campaigns	All campaigns, sorted by the created date, with the most recently created campaign at the top of the list

Campaign List	Filter
Recently Modified Campaigns	All campaigns, sorted by the modified date, with the most recently modified campaign at the top of the list
All Campaigns	None. The list shows all campaigns for your company, sorted by Campaign Name, in ascending order.
My Recently Modified Campaigns	All campaigns owned by you. The list is sorted by the modified date, with the most recently modified campaign at the top of the list.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Campaigns

The My Recently Viewed Campaigns section shows the campaigns that you viewed most recently.

To expand the list, click the Show Full List link.

Working with Campaign Tasks

The Campaign Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.

- To review a task, click the Subject link.
- To review the campaign with which the task is associated, click the campaign name.
- To expand the list of tasks, click Show Full List.

Viewing Active Campaigns

The Active Campaigns section shows a list of campaigns that is currently running.

- To view an active campaign, click the Campaign Name field.
- To expand the list, click Show Full List.

Report Sections

One or more report sections might be shown on your Campaign Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Active Campaign Status section is shown.

Using Reports to Measure Campaign Effectiveness

One or more report sections might be shown on your Campaign Homepage (your company administrator can specify which report sections are shown on the page). In the standard application, the Active Campaign Status section is shown, which displays an analysis of all active campaigns. For more information about using the Active Campaign Status section, see [Measuring Campaign Effectiveness](#) (on page 154).

Adding Sections to Your Campaign Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Campaign Homepage, depending on which sections your company administrator has made available for display on your Campaign Homepage.

To add sections to your Campaign Homepage

- 1 On the Campaign Homepage, click Edit Layout.
- 2 On the Campaign Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Campaigns

To manage campaigns, do the following tasks:

- [Targeting Contacts for Campaigns](#) (on page 152)
- [Recording Responses to Campaigns](#) (on page 152)
- [Closing Campaigns](#) (on page 153)
- [Measuring Campaign Effectiveness](#) (on page 154)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- [Campaign Fields](#) (on page 154)
- [Working with the Campaign Homepage](#) (on page 149)
- [Reports](#) (on page 675)
- [Importing Your Data](#) (on page 1448)

Targeting Contacts for Campaigns

You can select contacts that you want to target for a campaign.

NOTE: If your company uses Segmentation Wizard, a downloadable application that works between Oracle CRM On Demand and Excel, you can build target segments that filter records according to criteria from a number of record types. For information about how to download and use Segmentation Wizard, see [Using Segmentation Wizard](#) (on page 669).

To target contacts for a campaign

- 1 Select the campaign.

For instructions on selecting campaigns, see [Finding Records](#) (on page 41).

- 2 On the Campaign Detail page, scroll down to the Recipients section and do the following:

NOTE: If the Recipients section is not visible on the Campaign Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Recipients section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- To target contacts one by one, click Add.
- To remove the contact, click the Remove link in the record row. This disassociates the records without deleting any records.

- 3 Save the record.

To import contacts from a file, see [Importing Your Data](#) (on page 1448).

Recording Responses to Campaigns

When you want to record the response to a campaign, such as the fact that a recipient attended an event, you can track that in the campaign recipient section.

To record a response to a campaign

- 1 Select the campaign.

For instructions on selecting campaigns, see [Finding Records](#) (on page 41).

Note: If the Recipients section does not appear in the Campaign Detail page, click Page Layout to add it.

- 2 On the Campaign Detail page, scroll down to the Recipients section, and click Edit for the contact whose response you want to record.
- 3 On the Campaign Response Edit page, fill in the information.

Field	Description
Delivery Status	<p>The standard values are Pending, Sent, Soft Bounce, Hard Bounce, Unknown Bounce, Received, and Opened. However, your company administrator can rename the options in this drop-down list.</p> <p>If your company uses Oracle Email Marketing On Demand, the recipient delivery status is automatically updated (for the Soft Bounce, Hard Bounce, or Message Opened values only).</p>
Response Status	<p>The standard values are Click-thru, RSVP - Will Attend, RSVP - Will Not Attend, Attended, Converted to Lead, Requested More Info, Opt-in to List, Opt-out from List, Global Opt-in, Global Opt-out, and Message Opened. However, your company administrator can customize the options in this drop-down list.</p> <p>If your company uses Oracle Email Marketing On Demand, the response status is automatically updated (for the Click-thru, Opt-in to List, Opt-out from List, Global Opt-in, Global Opt-out, or Message Opened values only).</p>

- 4 Save the record.

Closing Campaigns

You can change the campaign status to indicate it is completed.

To close a campaign

- 1 On the Campaign List page, click in the Status field.
- 2 Select the Completed status from the drop-down list.
- 3 Click the green check mark icon in the Status field to save the record.

Measuring Campaign Effectiveness

The Active Campaign Status section of the Campaign Homepage shows an analysis of all active campaigns. You can use this information to determine the effectiveness of your campaigns.

To view information about the effectiveness of your campaigns

- In this section of the Campaign Homepage, do the following:
 - Place your pointer on the chart to see specific information.
 - Click a segment to review a detailed report.
 - Change the categories in the lists to view the same data from a different perspective.

For example, you can view the analysis of campaigns by the ROI (return on investment), lead-conversion rate, or the cost for each lead.

Campaign Fields

Use the Campaign Edit page to add a campaign or update details for an existing campaign. The Campaign Edit page shows the complete set of fields for a campaign.

TIP: You can also edit campaigns on the Campaign List page and the Campaign Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Campaign Information	
Source Code	Campaign identifier code. Make sure the code you enter is unique. This field has a maximum of 30 characters.
Campaign Name	Descriptive name of the campaign. This field has a maximum of 100 characters.
Campaign Type	Type of campaign, such as Advertisement, Direct Mail, Email, Event - Other, Event - Seminar, Event - Trade Show, List - Purchased, List - Rented, Other, Referral - Employee, Referral - External, or Web Site.
Objective	Description of the campaign's objective, such as "To increase sales by 10%."
Audience	Target audience of the campaign.
Offer	Description of the product or service the campaign is offering.

Field	Description
Status	<p>Campaign status, such as:</p> <ul style="list-style-type: none"> ■ Active. Start date is in the past and end date is in the future ■ Completed. Start and end dates are in the past. ■ Planned. Start and end dates are in the future. ■ Scheduled. You can manually set this status to indicate that the campaign is ready and is now set to execute at a particular date and time. ■ Contact Support. In Oracle Email Marketing On Demand, this status is automatically set if there is a problem with the campaign. <p>You must set the status. The system does not automatically update it when the campaign is launched, unless your company uses Oracle Email Marketing On Demand. If your company uses Oracle Email Marketing On Demand, Active, Completed, and Contact Support statuses are automatically assigned.</p>
Start Date	Date and time the campaign starts. Defaults to the current date and time. You can use the calendar controls to change this date.
End Date	Date and time the campaign is scheduled to be completed. Defaults to the current date and time. You can use the calendar controls to change this date.
Campaign Currency	Enter the code (such as USD) for the currency used for all revenue fields.
Campaign Plan Information	
Revenue Target	Revenue expected to be generated by the campaign.
Leads Targeted (#)	Number of prospects the campaign targets.
Budgeted Cost	Amount your company budgets for this campaign.
Actual Cost	Amount your company is spending on this campaign.
Additional Information	
Owner	<p>Alias of the record owner. Defaults to the campaign's creator. Generally, owners can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>
Description	Description of the campaign. This field has a limit of 16,350 characters.

Leads

Use the Leads pages to create, update, and evaluate leads. A *lead* is a person who has indicated an interest in your products or services.

You can enter leads manually, or they can be assigned to you. You can follow up assigned leads to determine if they will eventually generate revenue for the company. Creating a lead record is a quick way to gather new customer information. In one record you can enter details about the company, the person, and the business interest, instead of creating four different records for an account, a contact, a deal registration, and an opportunity.

A lead moves through the lead management process in the following sequence of stages: evaluating, qualifying, and converting to an opportunity or deal registration. Instead of qualifying a lead, you might remove it by archiving it. Instead of converting a qualified lead to an opportunity or deal registration, you might reject it. The rest of this topic explains the stages in more detail.

Evaluating Leads

During evaluation, the person evaluating the lead performs a number of ongoing activities:

- Calls, emails, or visits the contact to exchange information.
- Updates specific information about the lead with more accurate and newly discovered information.
- Creates, tracks, and completes activities regarding the lead.
- Logs notes regarding the interaction.
- (Optional but recommended) Links the lead to an account and a contact, which has these advantages:
 - The user assigned to the account or contact (who may or may not also be the user assigned to the lead) can view the lead during the evaluation process, because it will appear in the Account and Contact pages.
 - The lead owner can access additional information about the account or contact by clicking a link.
 - The lead owner can enter more details than can typically be stored with a lead, such as additional contacts at the account, ship to address, and so on.
 - If the lead is converted to an opportunity or deal registration, the existing account and contact links can speed up that process.

Qualifying Leads

The qualification process helps the evaluator to gather enough information to determine which leads to pursue further. When the evaluator determines that a lead has some potential for generating revenue, the evaluator qualifies the lead. The system then checks to make sure that certain critical fields contain data. If the criteria have been met, the lead is marked as qualified, and becomes visible to the sales person as a newly qualified lead.

Qualifying leads accurately helps your company to spend more time working on high-potential business deals. Company administrators can set up Lead Qualification scripts to help evaluators to qualify leads accurately and consistently. (For information on setting up assessment scripts, see [Setting Up Assessment Scripts](#) (on page 1476)).

Archiving Leads

Alternatively, if the lead is considered to have no value to the company, then the evaluator can archive the lead. The system then removes the lead from the lead management process.

TIP: To sort archived leads, create a new list called Archived Leads. For more information on creating lists, see [Creating and Refining Lists](#) (on page 73).

Converting Leads to Opportunities or Deal Registrations

Leads can be converted to contacts, and optionally to accounts, opportunities, and deal registrations using the Convert Lead page. The Convert Lead page contains lead conversion options as specified in the Lead Conversion layout that is applicable to the user role. If a lead has enough potential value, the evaluator can convert it to an opportunity or a deal registration, so long as a lead conversion layout has all lead conversion options enabled. The system prompts the evaluator for an account to link to the lead, a contact at that account to link to the lead, and an opportunity or deal registration to link to the lead.

The system then creates a new opportunity or deal registration with some values carried over from the lead, such as potential revenue and estimated close date. The system then removes the lead from active evaluation (although it can still be viewed if desired).

What Happens During Conversion

Some information from the lead record is carried over to the relevant areas in the Account, Contact, Opportunity, and Deal Registration records that are created during the conversion process. The following table shows an example of how the fields are mapped among the records using the Lead Conversion Mapping page.

Lead	Account	Opportunity	Contact	Deal Registration
Address	Billing Address	Not applicable	Contact Address	Deal Address
Annual Revenues	Annual Revenues	Not applicable	Not applicable	Not applicable
Approximate Income	Not applicable	Not applicable	Total Income	Not applicable
Associated Company	Not applicable	Not applicable	Not applicable	Associated Company
Associated Contact	Not applicable	Not applicable	Not applicable	Associated Contact
Campaign	Source Campaign NOTE: If the account is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the account is created by a user, the user can enter the information in this field.	Source Campaign NOTE: If the opportunity is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the opportunity is created by a user, the user can enter the information in	Source Campaign NOTE: If the contact is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the contact is created by a user, the user can enter the information in	Not applicable

Lead	Account	Opportunity	Contact	Deal Registration
		this field.	this field.	
Cellular Phone #	Not applicable	Not applicable	Cellular Phone #	Cell Phone
City	Billing City Shipping City	Not applicable	Primary City	City (of Deal Address)
Company	Account Name	Account	Account	Company Name
Country	Billing Country Shipping Country	Not applicable	Primary Country	Country
Date of Birth	Not applicable	Not applicable	Date of Birth	Not applicable
Description	Not applicable	Description	Not applicable	Justification
Email	Not applicable	Not applicable	Email	Email
Estimated Close Date	Not applicable	Close Date	Not applicable	Close Date
First Name	Not applicable	Not applicable	First Name	Not applicable
Industry	Industry	Not applicable	Not applicable	Not applicable
Job Title	Not applicable	Not applicable	Job Title	Not applicable
Last Name	Not applicable	Not applicable	Last Name	Not applicable
Lead Currency	Not applicable	Not applicable	Not applicable	Deal Currency
Lead Owner	Not applicable	Not applicable	Not applicable	Not applicable
Lead Type	Account Type	Not applicable	Contact Type	Not applicable
Mr./Ms.	Not applicable	Not applicable	Mr./Ms	Not applicable
Never Email	Not applicable	Not applicable	Never Email	Not applicable
Next Step	Not applicable	Next Step	Not applicable	Next Step
Number of Employees	Number of Employees	Not applicable	Not applicable	Not applicable
Originating Partner	Not applicable	Not applicable	Not applicable	Originating Partner
Potential Revenue	Not applicable	Revenue	Not applicable	Deal Size
Primary Phone #	Not applicable	Not applicable	Work Phone #	Telephone #
Principal Partner	Not applicable	Not applicable	Not applicable	Principal Partner
Product Interest	Not applicable	Opportunity Name becomes:	Not applicable	Product Interest

Lead	Account	Opportunity	Contact	Deal Registration
		Product Interest (Contact Full Name)		
Profession	Not applicable	Not applicable	Profession	Not applicable
Qualified Date	Not applicable	Not applicable	Qualified Date	Not applicable
Rating	Not applicable	Not applicable	Not applicable	Not applicable
Referred by	Not applicable	Not applicable	Referred by	Not applicable
Source	Not applicable	Lead Source	Lead Source	Not applicable
State/Province	Billing State/Province Shipping State/Province	Not applicable	Primary State/Province	State (of Deal Address)
Website	Web Site	Not applicable	Not applicable	Not applicable
Work Fax #	Not applicable	Not applicable	Work Fax #	Not applicable
Zip/Postal Code	Billing Zip Code Shipping Zip Code	Not applicable	Primary Zip/Postal Code	Zip (of Deal Address)

Additionally, some fields show different values as a result of the lead conversion process. The following table lists the new values.

This record/field	Changes to this value
Lead record	
Status	Converted
Account record	
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.
Opportunity record	
Status	Pending
Sales Stage	Building Vision
Probability	50%
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.
Contact record	
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.
Deal Registration Record	

This record/field	Changes to this value
Name	Product Interest on the lead. You can override this field.
Type	Standard
Submission Status	Not Submitted.

Ownership of Related Lead Records After Conversion

If you have populated the Sales Person field, when the lead is converted that person becomes the owner of all related records. If this field is not populated, the user converting the lead becomes the owner of all related records by default. However, the company administrator can change this behavior using the Lead Conversion Mapping feature. For more information, see [Mapping Additional Fields During Lead Conversion](#) (on page 1264).

Rejecting Qualified Leads

Qualified leads can also be rejected. This is typically done in organizations where the person or group evaluating leads is different from the sales people who take qualified leads and convert them into revenue. In those organizations, the sales person assigned to a qualified lead may determine that the lead is not as valuable as the evaluator had indicated.

When rejecting a lead, the sales person must specify a Reject Code for the rejection and can optionally specify the Reject Reason as well. If the Reject Code selected is Other, the Reject Reason becomes a required field. The system records that a rejection occurred, who rejected it, and why it was rejected.

The sales person may also choose to have the lead reassigned as part of the rejection. Depending on the company's policies, the lead may be reassigned to a manager for follow-up, or it may go back to the original evaluator for further assessment.

Working with the Leads Homepage

The Leads Homepage is the starting point for managing leads.

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

Creating a Lead

You can create a lead by clicking the New button in the My Recently Viewed Leads section. For more information, see [Creating Records](#) (on page 38) and [Leads Fields](#) (on page 170).

Working with Leads Lists

The Lead Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for leads.

Leads List	Filter
All Leads	None
All Converted Leads	Displays leads where the Status field is set to Converted
All Leads Being Qualified	Displays leads where the Status field is set to Qualifying
All Qualified Leads	Displays leads where the Status field is set to Qualified
Recently Created Leads	Displays all leads, sorted by the created date
Recently Modified Leads	Displays all leads, sorted by the modified date
All Rejected Leads	Displays leads where the Status field is set to Rejected
My Leads	Displays leads, sorted by the created date, that meet one of the following conditions: <ul style="list-style-type: none"> ■ The Sales Person field is set to your user name, and the Status field is set to Qualifying. ■ The Lead Owner field is set to your user name, the Sales Person field is empty, and the Status field is set to Qualifying.
My New Leads	Displays leads, sorted by the created date, that meet one of the following conditions: <ul style="list-style-type: none"> ■ The Sales Person field is set to your user name, and the Status field is set to Qualified. ■ The Lead Owner field is set to your user name, the Sales Person field is set to a user name other than your user name, and the Status field is set to Qualifying.
My Recently Created Leads	Displays all leads that you own. The list is sorted by the created date, with the most recently created lead at the top of the list.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Leads

The My Recently Viewed Leads section shows the leads that you viewed most recently.

To expand the list, click Show Full List.

Working with Lead Tasks

The My Open Lead Related Tasks section shows the tasks assigned to you, sorted by due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.

- To review a task, click the Subject link.
- To review the lead with which the task is associated, click the lead name.
- To expand the list of tasks, click Show Full List.

Viewing Qualified Leads

The Qualified Leads section shows a list of qualified leads. The Full Name field is a link that opens the lead record.

- To open the lead record, click the Full Name field.
- To expand the list, click Show Full List.

Using Reports to Analyze Lead Followup

One or more report sections might be shown on your Leads Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Lead Followup Analysis section is shown, which displays the progress made towards qualifying leads in the last 90 days. For information about using the Lead Followup Analysis section, see [Analyzing Lead Followup](#) (on page 170).

Adding Sections to Your Leads Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Leads Homepage, depending on which sections your company administrator has made available for display on your Leads Homepage.

To add sections to your Leads Homepage

- 1 On the Leads Homepage, click Edit Layout.
- 2 On the Lead Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.

- 3 Click Save.

Managing Leads

To manage leads, do the following tasks:

- [Reassigning Leads](#) (on page 163)
- [Qualifying Leads](#) (on page 164)
- [Using Lead Qualification Scripts](#) (on page 164)
- [Archiving Leads](#) (on page 165)
- [Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities](#) (on page 166)
- [Rejecting Leads](#) (on page 169)
- [Analyzing Lead Followup](#) (on page 170)

NOTE: If you are using Oracle CRM On Demand Financial Services Edition and taking advantage of the Referrals feature, new leads are created when you link new referrals to contacts.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Reassigning Leads

When you create a lead, you automatically become the owner of that lead. If your access level permits editing this record, you can reassign the lead to another person. Your company administrator can also set up the system to assign leads by specifying assignment rules.

To reassign a lead

- 1 Select the lead you want to reassign.

For instructions on selecting leads, see [Finding Records](#) (on page 41).

- 2 On the Lead Detail page, click Edit.

- 3 On the Lead Edit page, in the Additional Information section, do one of the following:
 - In the Owner Full Name field, click the Lookup icon and then select another user in the Lookup window.
 - Select the Reassign Owner check box to have the system reassign the lead.
- 4 Save the record.

NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

Qualifying Leads

If you determine that a lead has some potential for becoming an opportunity, you can qualify the lead. Normally, you select a rating for the lead according to a scale set up by your company administrator.

NOTE: Your company administrator might have set up assessment scripts to help you to evaluate leads for qualification. For more information on using Lead Qualification scripts, see [Using Lead Qualification Scripts](#) (on page 164).

Before you begin. To perform this procedure, your user role must include the Qualify Leads privilege.

To qualify a lead

- 1 Select the lead.

For instructions on selecting leads, see [Finding Records](#) (on page 41).
- 2 On the Lead Detail page, make sure that the lead record's First Name, Last Name, Rating, Owner Full Name, and Sales Person fields are filled. These fields are required in order to qualify the lead.

NOTE: This information helps to ensure that leads are not lost after they are qualified, and that valuable sales resources are used to full advantage to follow up leads that will evolve into a sales opportunity. In particular, if the Rating and Sales Person fields are not filled, you will not be able to set the status of the lead to Qualified.
- 3 Click Mark as Qualified.

The system verifies that the critical fields contain data. If the criteria are met, the lead Status field value changes to Qualified.

NOTE: If you receive an error message after clicking Mark as Qualified, verify that the Qualified Date field has not been customized with a read-only value.

Using Lead Qualification Scripts

Your company administrator might have set up assessment scripts to help you to evaluate leads for qualification. A Lead Qualification script consists of a series of questions that you use to collect customer data.

Your responses are scored, assigned a weighting, and compared with a specified threshold to determine the appropriate outcome or course of action.

CAUTION: If a Lead Qualification script attempts to set the Status field on a lead to Qualified, it cannot do so unless the Rating and Sales Person fields on the lead are filled in. If these fields are not filled in, an error message is displayed, and the script assumes the lead has failed to meet the threshold. The script then sets the Status field according to the results defined on the script for failing to meet the threshold.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see [About Assessment Scripts](#) (on page 1477).

To use a lead qualification script

- 1 Select the lead.

For more information on selecting leads, see [Finding Records](#) (on page 41).

- 2 On the Lead Detail page, scroll down to the Lead Qualification Scripts section, and click Add.

NOTE: If the Lead Qualification Scripts section is not shown, click the Edit Layout link in the upper-right corner of the page, and add the Lead Qualification Scripts section to your page layout. This section is only available if the company administrator has set up a Lead Qualification script.

- 3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.
- 4 In the Lead Qualification Scripts window, select the answer for each script question, and click Save.
The Lead Detail page appears again. Depending on the outcome of the script, some of the fields on the record might have been updated automatically.

Archiving Leads

Instead of qualifying a lead, you can specify that it is not worth pursuing and remove it from the assessment process. Archiving a lead does not delete it, but retains the lead in the database with a status of Archived.

Before you begin. To perform this procedure, your user role must include the Archive Leads privilege.

To archive a lead

- 1 Select the lead you want to archive.

For instructions on selecting leads, see [Finding Records](#) (on page 41).

- 2 On the Lead Detail page, click Archive.

The lead Status field changes to Archived.

Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities

If your user role has the appropriate setup, you can create account, contact, deal registration, and opportunity records, or copy lead information to existing records by converting the lead record. Depending on your company's settings, the new opportunity record can include information that affects revenue calculations.

NOTE: Normally, you convert leads to opportunities that have previously been qualified. See [Qualifying Leads](#) (on page 164).

The procedure in this section describes the steps for these two scenarios:

Scenario 1. You have new leads resulting from a campaign your company conducted. As part of each lead record, you have a person's name along with their company name. You now want to create a new contact, a new account, and, potentially, a new opportunity record using information from the lead.

Scenario 2. You run a campaign targeted at existing accounts and contacts. Some leads are generated that you now want to convert to opportunities.

Before you begin. To perform this procedure, your user role and access profile settings must be set up as described in [Access Profile and Role Settings for Converting Leads](#) (on page 168). The Convert Lead page shows only the conversion options that are available to your user role, according to the lead conversion layout that has been selected for the role. If a lead conversion layout has not been selected for the role, the default lead conversion layout applies.

To convert a lead to an account, contact, deal registration, or opportunity

- 1 Select the lead you want to convert.

For instructions on selecting leads, see [Finding Records](#) (on page 41).

- 2 On the Lead Detail page, click Convert.

- 3 On the Convert Lead page, do one of the following:

- To create new account and contact records for this lead (Scenario 1), select the Auto-create New Account and Auto-create New Contact options.

In the Account section, the Company field for the lead appears in the Account Name field by default. In the Contact section, the First Name and Last Name for the lead appear by default.

- To create a new opportunity and link the opportunity to an existing account and contact, select the Use Existing Account and Use Existing Contact options.

If the lead record has an associated account, this account appears in the Associated Account field. If the lead record has an associated contact, this contact appears in the Associated Contact field.

- To link the lead to a different account or contact, click the Lookup icon next to the Associated Account or Associated Contact fields and select another account and contact. Make sure the proper names appear in the Associated Account and Associated Contact fields and that the Use Existing Account and Use Existing Contact option buttons are selected.

- 4 (Optional) To convert the lead to an opportunity, select the Auto-Create New Opportunity option and complete the fields.

NOTE: The first name and last name from the lead record appear in the Opportunity Name field in the Convert Lead page by default. The values in the Revenue, Close Date, Next Step, and Description fields in the Convert Lead page are also carried into the opportunity record. You can edit these fields in the Convert Lead page.

- 5 (Optional) To convert the lead to a deal registration, select the Auto-Create Deal Registration option and complete the fields.

NOTE: By default, the values of the Product Interest field and Partner field from the lead record appear in the Deal Registration Name field and Principal Partner Account field respectively. The values in the Revenue, Close Date, Next Step, and Description fields in the Convert Lead page are also carried into the deal registration record. You can edit these fields in the Convert Lead page.

- 6 To convert the lead, click Save.

When the conversion is completed:

- The Lead Detail page appears again with these values, most based on the selections you made on the Convert Lead page:
 - The Status field for the lead is Converted.
 - The Associated Account and Associated Contact field values are the same as the ones that were on the Convert Lead page.
 - If you converted the lead to an opportunity, the Associated Opportunity field value is the same as the new opportunity name that was on the Convert Lead page.
 - If you converted the lead to an opportunity, the new opportunity record created from the conversion process has the converted lead linked to the opportunity record.
 - If you converted the lead to a deal registration, the Associated Deal Registration field value is the same as the new deal registration name that you specified on the Convert Lead page.
 - If you converted the lead to a deal registration, the new deal registration record created from the conversion process is also linked to the converted lead.
- If you converted the lead to an opportunity (Step 4) or deal registration (Step 5), the new opportunity or deal registration record inherits some field values from the lead.
- You can still view the lead record, but the business processes shift to the appropriate opportunity or deal registration record.

NOTE: For further information about the conversion process and its impact on fields and values, see [What Happens During Conversion in Leads](#) (on page 156). For further information on deleting records, see [Deleting and Restoring Records](#) (on page 100).

NOTE: You can convert the same lead to an account or contact multiple times, but you can only convert a lead to a deal registration or opportunity once. If you have converted a lead to a deal registration or opportunity, you cannot later convert it to a different deal registration or opportunity. However, a lead that has been converted to a deal registration can be re-converted to a different account or contact.

Access Profile and Role Settings for Converting Leads

To convert leads to accounts, contacts, deal registrations, or opportunities, you must have the appropriate settings in your access profiles and in your user role. This topic describes the required settings.

Access Profile Settings for Converting Leads

The access levels that allow you to convert leads are shown in the following tables. These settings are required on both your default access profile and your owner access profile.

The following table shows the access level settings for record types that allow you to convert leads.

Record Type	Access Level
Account	Read/Edit
Activity	Read/Edit
Contact	Read/Edit
Lead	Read/Edit
Opportunity	Read/Edit
Deal Registration	Read/Edit

The following table shows the access level settings for related information record types that allow you to convert leads.

Record Type	Related Information Record Type	Access Level
Account	Addresses	Read/Create/Edit
Contact	Accounts	Read/Create
	Addresses	Read/Create/Edit
Lead	Completed Activities	View
	Open Activities	View
Opportunity	Revenue	Read/Create
	Contact	Read/Create

User Role Settings for Converting Leads

The role settings that allow you to convert leads are as follows:

- The role must have the CRM Marketing: Convert Leads privilege.
- The record-type access for the role must have the following settings:

- For converting to opportunities, the Has Access and Can Create check boxes must be selected for the Opportunity record type.
- For converting to deal registrations, the Has Access and Can Create check boxes must be selected for the Deal Registration record type.
- The Has Access check box must be selected for the Lead record type in all cases of lead conversion.
- The Has Access and Can Create check boxes must be selected for the Activity record type in all cases of lead conversion.
- To convert leads to existing accounts, the Has Access check box must be selected for the Account record type.
- To convert leads to new accounts, the Has Access and Can Create check boxes must be selected for the Account record type.
- To convert leads to existing contacts, the Has Access check box must be selected for the Contact record type.
- To convert leads to new contacts, the Has Access and Can Create check boxes must be selected for the Contact record type.

Rejecting Leads

Instead of converting a qualified lead to an opportunity, you might decide that the lead is not as valuable as the evaluator indicated and remove it from the lead management process. Rejecting a lead does not delete it, but retains the lead in your company's records with a status of Rejected.

Before you begin. To perform this procedure, your user role must include the Reject Leads privilege.

To reject a qualified lead

- 1 Select the lead you want to reject.

For instructions on selecting leads, see [Finding Records](#) (on page 41).

- 2 On the Lead Detail page, click Reject.

- 3 On the Reject a Lead page, enter this information:

- In the Reject Code field, select a value from the drop-down list.
- (Optional) In the Reject Reason field, enter the reason for the rejection.

Note: If the Reject Code is set to Other, the Reject Reason field is required.

- To reassign the lead to a new owner, select the Reassign Owner check box.

The system reassigns the lead based on lead assignment rules set by your company's administrator. Depending on your company's policies, the rejected lead may be reassigned to the original owner or to the original owner's manager.

- 4 Click Confirm Reject.

The Lead Detail page reappears with information about the rejection, including your name, Reject Code, and, if specified, the reason for the rejection. The lead Status field value is changed to Rejected.

Analyzing Lead Followup

In the standard edition of Oracle CRM On Demand, the Lead Followup Analysis section of the Leads Homepage provides information to help you to analyze the progress made towards qualifying leads in the last 90 days.

In this section of the Leads Homepage, you can do the following:

- Evaluate the performance of the sales team from different perspectives.
- View the lead status for each sales team member by selecting Lead Owner or Sales Person.
- View data by month or week to see the status of leads for those periods.
- Identify what actions are required to move the leads through the sales process.
- Click a segment on the chart to view a lead list.
- Download or print these analyses.

Leads Fields

Use the Lead Edit page to add a lead or update details for an existing lead. The Lead Edit page shows the complete set of fields for a lead.

TIP: You can also edit leads on the Leads List page and the Lead Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Lead Information	
Company	For a company, corresponds to the account name.
Never Email	Indication of the lead's preference to receive emails or not.
Opportunity Related Information	
Status	Status of the lead, such as Qualifying, Qualified, Converted, Rejected, and Archived. Can only be changed on the Lead Edit page, <i>not</i> on the New Lead page. For more information about this field's values and their meanings, see Status Field Values below.
Rating	Scale rating as set up by your company, such as A = Hot, B = Warm, C = Cool, and D = Cold.

Field	Description
Product Interest	Product or service in which the lead expresses interest.
Potential Revenue	Potential revenue, in the currency selected by you or your company administrator.
Estimated Close Date	Date and time the lead is expected to close.
Next Step	Description of the next step to take.
Source	Source categories as set up by your company, such as Advertising, Direct Mail, Event, Promotion, Referral, Trade Show, Web, Partner, Purchased, Rented, and Other.
Campaign	Campaign that generates this lead or is linked to this lead.
Industry	Industry category for the lead as set up by your company.
Annual Revenues	Annual revenue for the lead's company.
Additional Information	
Associated Account	Account linked to this lead. Required for converting leads to opportunities.
Associated Contact	Contact linked to this lead. Required for converting leads to opportunities.
Associated Deal Registration	Deal Registration linked to this lead. This field is automatically set when a lead is converted to a deal registration.
Associated Opportunity	Opportunity linked to this lead. Required for converting leads to opportunities.
Owner Full Name	Owner of the lead record. Default value is the record's creator.
Reassign Owner	<p>Indicates that the lead should be reassigned. If your company administrator has set up lead assignment rules, selecting this field triggers assignment manager to process the lead again and assign it according to the rules.</p> <p>NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load. The name of the lead owner changes when the record is reassigned.</p>
Sales Person	Sales person your company assigns to this lead.
Description	Additional information describing the lead. Limit of 16,350 characters.
Web Site	The web site linked to the lead.
Ownership Status	The current status of ownership for the lead.
Profession	This field is specific to Oracle CRM On Demand Financial Services Edition.
Approximate Income	This is a currency field. This field is specific to Oracle CRM On Demand Financial Services Edition.

Field	Description
Date of Birth	This field is specific to Oracle CRM On Demand Financial Services Edition.
Age	This field is calculated from the Date of Birth field. This field is specific to Oracle CRM On Demand Financial Services Edition.
Qualified Date	Automatically populated with the current date when the Status field is set to Qualified.

Status Field Values

As a lead moves through the lead management process, the lead Status field indicates where it is in the process. Status values are a main way of filtering leads. For more information about the lead management process, see [Leads](#) (on page 156).

The following table lists the status field's possible values.

Status	Description
Archived	Results from completion of the Archiving steps (Archiving Leads (on page 165)). Lead is determined to have no value to your company and is removed from the assessment process.
Converted	Results from completion of the Converting steps (Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 166)). Lead is determined to have enough value to become an opportunity.
Qualified	Results from completion of the Qualifying steps (Qualifying Leads (on page 164)). Lead has passed the Qualify process. New owner becomes the salesperson assigned to the lead.
Qualifying	Results from completion of the Creating steps (Qualifying Leads (on page 164)). Lead has been created and is undergoing or about to start the Qualifying process. Owner defaults to the person who created the lead.
Rejected	Results from completion of the Rejecting steps (Rejecting Leads (on page 169)). Qualified lead is determined not to have as much value as the evaluator originally thought.

4 Sales

Oracle CRM On Demand provides the following record types for sales information:

- **Accounts.** Use these pages to manage information about the companies with whom you do business.
- **Contacts.** Use these pages to track people associated with your accounts and opportunities.
- **Opportunities.** Use these pages to manage potential revenue-generating opportunities.
- **Forecasts.** Use these pages to generate forecasts to project quarterly revenue based on the existing opportunities.

The Leads record type is also related to the sales area, because leads might be converted to opportunities.

Oracle CRM On Demand also provides the following record types for sales and business planning information:

- **Business Plan.** Use these pages to establish strategic goals and actions for accounts, contacts, or products.
- **Objective.** Use these pages to manage higher-level goals that you want to achieve.
- **Plan Account.** Use these pages to track how accounts are mapped to business plans.
- **Plan Contact.** Use these pages to associate contacts with business plans.
- **Plan Opportunity.** Use these pages to associate opportunities with business plans

Managing Sales

To manage sales, perform the following processes:

- 1 [Process of Managing Opportunities](#) (on page 174)
- 2 [Process of Managing Accounts](#) (on page 174)
- 3 [Process of Managing Contacts](#) (on page 175)
- 4 [Process of Managing Forecasts for Sales Users](#) (on page 175)
- 5 [Process of Managing Forecasts for Forecast Administrators](#) (on page 176)
- 6 [Process of Managing Calendar and Activities](#) (on page 176)

Process of Managing Opportunities

To manage opportunities, perform the following tasks:

- 1 Review opportunity fields and related information, see [Opportunity Fields](#) (on page 226).
- 2 Create a new opportunity record, see [Creating Records](#) (on page 38).
- 3 Add product revenue records to the opportunity, see [Linking Products to Opportunities](#) (on page 216).
- 4 Define the key contacts and contact roles, see [Contacts](#) (on page 194) and [Adding Roles](#) (on page 1173).
- 5 Track activities and notes that are related to opportunities, see [Activity Fields](#) (on page 143) and [Adding Notes](#) (on page 87).
- 6 Assign opportunity ownership and visibility, see [Access Profile Management](#) (on page 1133) and [Sharing Records \(Teams\)](#) (on page 84).
- 7 Update the opportunity sales stage, see [About Opportunities and Forecasts](#) (on page 210).
- 8 Link partners and competitors related to the opportunity, see [Tracking Partners and Competitors of Opportunities](#) (on page 214).
- 9 Assess and forecast the opportunity, see [About Opportunities and Forecasts](#) (on page 210).

Process of Managing Accounts

To manage accounts, perform the following tasks:

- 1 Review the account fields and related information, see [Account Fields](#) (on page 192).
- 2 Create a new account record, see [Creating Records](#) (on page 38).
- 3 Define the key contacts and contact roles, see [Contacts](#) (on page 194) and [Adding Roles](#) (on page 1173).
- 4 Track the account-related activities and notes, see [Activity Fields](#) (on page 143) and [Adding Notes](#) (on page 87).
- 5 Assign the account ownership and visibility, see [Access Profile Management](#) (on page 1133) and [Sharing Records \(Teams\)](#) (on page 84).
- 6 Associate partners and competitors with the account, see [Tracking Partners and Competitors of Accounts](#) (on page 185).
- 7 Define the account relationships, see [Tracking Relationships Between Accounts](#) (on page 187).
Note: This step is specific to Oracle CRM On Demand Financial Services Edition.
- 8 Add the revenue records to the account, see [Tracking Revenue Based on Accounts](#) (on page 189).
Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

- 9 Forecast the account revenue, see [Tracking Revenue Based on Accounts](#) (on page 189).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

- 10 Track the account assets, see [Tracking Assets](#) (on page 188).

Process of Managing Contacts

To manage contacts, perform the following tasks:

- 1 Review the contact fields and related information, see [Contact Fields](#) (on page 206).
- 2 Create a new contact record, see [Creating Records](#) (on page 38).
- 3 Track the contact-related activities and notes, see [Activity Fields](#) (on page 143) and [Adding Notes](#) (on page 87).
- 4 Assign contact ownership and visibility, see [Access Profile Management](#) (on page 1133) and [Sharing Records \(Teams\)](#) (on page 84).
- 5 Synchronize the contacts with your PIM, see [Synchronizing with PIMs](#) (on page 637).
- 6 Complete a customer satisfaction survey, see [Using Service Request Scripts](#) (on page 274).
- 7 Define the contact relationships, see [Tracking Relationships Between Contacts](#) (on page 202).
Note: This step is specific to Oracle CRM On Demand Financial Services Edition.
- 8 Add the revenue records to the contact, see [Tracking Revenue Based on Contacts](#) (on page 203).
Note: This step is specific to Oracle CRM On Demand Financial Services Edition.
- 9 Forecast the contact revenue, see [Tracking Revenue Based on Contacts](#) (on page 203).
Note: This step is specific to Oracle CRM On Demand Financial Services Edition.
- 10 Track the contact assets, see [Tracking Assets](#) (on page 188).
Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

Process of Managing Forecasts for Sales Users

To manage forecasts, perform the following tasks:

- 1 Set the quotas, see [Managing Quotas](#) (on page 235).
- 2 Forecast the opportunities, accounts, and contacts, see [Forecasts](#) (on page 228).
- 3 Review the forecasts, see [Reviewing Forecasts](#) (on page 230).

- 4 Update the forecasts, see [Refreshing Forecasts](#) (on page 232).
- 5 Submit the forecasts, see [Submitting Forecasts](#) (on page 234).

Process of Managing Forecasts for Forecast Administrators

To manage forecasts, perform the following tasks:

- 1 Set up the company's fiscal calendar, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).
- 2 Determine the forecast hierarchy, see [Setting Up the Forecast Definition](#) (on page 1267).
- 3 Set the user quotas, see [Setting Up Users' Sales Quotas](#) (on page 1121).
- 4 Create the forecast definition, including Date, Type, Duration, and Participants, see [Setting Up the Forecast Definition](#) (on page 1267).

Process of Managing Calendar and Activities

To manage calendar and activities, perform the following tasks:

- 1 Review the current calendar appointments, see [Calendar and Activities](#) (on page 117).
- 2 Create the new appointments and tasks, see [Creating Activities](#) (on page 120).
- 3 Share your calendar with other users, see [Viewing Others' Calendars](#) (on page 139).
- 4 Track and manage the key tasks, see [Calendar and Activities](#) (on page 117).
- 5 Synchronize appointments and tasks with your PIM, see [Synchronizing with PIMs](#) (on page 637).

Leads (Sales Aspects)

Leads play an important role in the sales process. The sales process might originate with lead generation. Leads move progressively through qualification to conversion. For more information about the sales process, see [Managing Marketing](#) (on page 147). You can convert leads to contacts, accounts, deal registrations, and opportunities. After a lead has been converted to an opportunity or deal registration, it enters the sales process. Certain fields in the opportunity or deal registration record obtain their values from the lead record. These values are based on mapping the leads that have been converted during the sales process.

Accounts

Use the Account pages to create, update, and track accounts. *Accounts* are generally companies that you do business with, but you can also track partners, competitors, affiliates, and so on as accounts.

If account records are central to how your company manages its business, as is the case in many companies, enter as much information about accounts as you can. Some of that information, such as the Region or Industry field, can be used in reports as a way to categorize information. Similarly, if you link a record, such as an opportunity, to an account record with the Region or Industry field filled in, those opportunities can be categorized by those values.

Related Topics

See the following topic for related information:

- [Managing Accounts](#) (on page 179)

Working with the Account Homepage

The Account Homepage is the starting point for managing accounts.

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

Creating an Account

You can create an account by clicking the New button in the My Recently Viewed Accounts section. For more information, see [Creating Records](#) (on page 38) and [Account Fields](#) (on page 192).

Working with Account Lists

The Account Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for accounts.

Account List	Filters
All Accounts	All accounts, sorted alphabetically by Account Name
All Customer Accounts	Accounts where the account type is set to customer
All Account Competitor Accounts	Accounts where the account type is set to competitor
All Account Partner Accounts	Accounts where the account type is set to partner

Account List	Filters
All Prospect Accounts	Accounts where the account type is set to prospect
Recently Created Accounts	All accounts, sorted by the created date
Recently Modified Accounts	All accounts, sorted by the modified date
All Referenceable Accounts	Accounts with the Reference check box selected
All Top Accounts	Accounts where the priority is set to high
My Accounts	Accounts where your name is in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Accounts

The My Recently Viewed Accounts section shows the accounts that you viewed most recently.

To expand the list, click Show Full List.

Working with Account Tasks

The My Open Account Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.

- To review a task, click the Subject link.
- To review the account with which the task is associated, click the account name.
- To expand the list of tasks, click Show Full List.

Using Reports to Analyze Account Performance

One or more report sections might be shown on your Account Homepage (your company administrator can specify which report sections are shown on the page). In the standard edition of Oracle CRM On Demand, the Account Analysis section is shown, which displays a comprehensive analysis of how accounts are distributed and of the closed revenue. For information about using the Account Analysis section, see [Analyzing Account Performance](#) (on page 192).

Adding Sections to Your Account Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Account Homepage, depending on which sections your company administrator has made available for display on your Account Homepage.

To add sections to your Account Homepage

- 1 On the Account Homepage, click Edit Layout.
- 2 On the Account Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Accounts

To manage accounts, perform the following tasks:

- [Tracking Contact Roles at an Account](#) (on page 180)
- [Changing an Account Primary Contact](#) (on page 181)
- [Linking Records to Accounts](#) (on page 181)
- [Linking Portfolio Accounts](#) (on page 183)
- [Specifying Parent Accounts](#) (on page 184)
- [Limiting Account Records Displayed](#) (on page 184)
- [Tracking Partners and Competitors of Accounts](#) (on page 185)
- [Tracking Relationships Between Accounts](#) (on page 187)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Tracking Assets](#) (on page 188)
- [Tracking Revenue Based on Accounts](#) (on page 189)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Analyzing Account Performance](#) (on page 192)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)

- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Sharing Records \(Teams\)](#) (on page 84)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- [Account Fields](#) (on page 192)
- [Working with the Account Homepage](#) (on page 177)
- [Reports](#) (on page 675)
- [Using the Offline Client](#) (on page 628)
- [Importing Your Data](#) (on page 1448)

Tracking Contact Roles at an Account

Tracking a contact's role or roles at a company is critical to understanding the influence that the contact has on any buying decisions at the account. In addition to specifying a contact's role from the Account Details page, you can define a contact's role for each related account from the contact detail page.

To specify one or more roles for an account contact

- 1 Select the account.
For information on selecting accounts, see [Finding Records](#) (on page 41).
- 2 In the Contacts section of the Account Detail page, click the Edit Roles link for the contact.
The Account Roles Edit page shows the available and selected roles for the account contact.
- 3 In the Available section, choose roles (for example, User, Evaluator, Approver) for the contact, and use the directional arrow to move the roles to the Selected section.
Use the up and down arrow to change the order of the roles. The top role in the list is the primary role.
- 4 Click Save.

Changing an Account Primary Contact

An account can have multiple contacts, but one of the contacts must be specified as the primary contact for the account. By default, the first contact added for the account is the primary contact, but you can change this setting.

To change an account primary contact

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 41).

- 2 On the Account Detail page, click Edit.

NOTE: If the Primary Contact field is not displayed on the Account Detail and Account Edit page, contact your company administrator to have the field added to your page layout.

TIP: If the inline edit feature is enabled for your company, you can change the primary contact inline on the Account Detail page. For more information on inline editing, see [Updating Record Details](#) (on page 60).

- 3 On the Account Edit page, click the Lookup icon on the Primary Contact field.

- 4 In the Lookup window, select the new primary contact.

- 5 On the Account Edit page, click Save.

Linking Records to Accounts

You can link the new records you create from the Detail page, such as contacts and activities, to the account record. Linking associates records to each other so that you and others who have access rights to the record get a full view of the information.

New records are added to the database at the same time they are linked to the selected account. For example, a contact you create from the Account Detail page is linked to the account and then appears on the Contacts pages.

An account record contains information that, after linking to another record, is inherited. For example, some opportunity reports display the records by Region or Industry. Since Region and Industry are not part of the opportunity records, the system looks to linked account records to determine which group the opportunity belongs to. Therefore, whenever possible, you want to link records to the account record.

You can also link other users to an account record to allow them to view the record. For example, you might need to share an account record with a team of colleagues you are working with to close a deal. Based on each role, a team member might have different access requirements for the account record, and the contact and opportunity records that are linked to the account.

To link information to an account

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 41).

- 2 On the Account Detail page, scroll to the appropriate section, and link records to the account, as necessary.

NOTE: Your company administrator determines the type of related information that can be displayed on your Account Detail page. You can change the order of the related information sections that are available to you or hide any related information that you are not using. To edit your page layout, click Edit Layout, and click the arrows on the Personal Layout page to add or remove sections, and to organize the sections on the page. Changing these settings affects only your view of Oracle CRM On Demand.

The following table lists some of the record types that you might be able to link to an account.

Record Type	Information
Opportunities	To link a new opportunity, click New, enter the required information in the Edit form, and save the record. For field descriptions, see Opportunity Fields (on page 226).
Service Requests	To link a new service request, click New, enter the required information in the Edit form, and save the record. For field descriptions, see Service Request Fields (on page 276).
Notes	<p>To link a new note, click New, enter the required information, and save the record.</p> <p>NOTE: You can also add notes by clicking the note icon at the top-right of the page, if this feature is enabled for your company.</p> <p>For more information about notes, see Adding Notes (on page 87).</p>
Open Activities	<p>To link a new task or appointment, click New Task or New Appt. Then enter the required information in the Edit form, and save the record. For field descriptions, see Activity Fields (on page 143).</p> <p>You can link several activities to an account. If an activity has a time associated with it, the activity appears in the Activities list and Calendar.</p> <p>Users that have visibility to an account can also see the activities linked to the account, including those activities owned by or assigned to others.</p>
Contacts	<p>To link a new contact, click New, enter the required information in the Edit form, and save the record. For field descriptions, see Contact Fields (on page 206).</p> <p>TIP: To avoid duplicating contact records, you can also click Add, and then click the Lookup icon next to the New Contact column. In the Lookup window, enter the First Name, Last Name, or email address, and click Go. If the application doesn't find the contact, click New to create the contact record.</p> <p>If you know the contact record exists, click Add to link it to this record.</p> <p>To open the Contact Detail page to update information about the contact, click the Name link.</p>

Account Team	To allow this record to be visible to other employees, click Add Users. In the Account Team Add User window, select the employee's name and specify the access level. For more information on sharing records, see Sharing Records (Teams) (on page 84).
Account Partners	To link an account and track it as your partner with this account, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (on page 185).
Account Competitors	To link an account and track it as your competitor for this account, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (on page 185).

To remove or delete a linked record

- 1 Select the account.
For instructions on selecting accounts, see [Finding Records](#) (on page 41).
- 2 On the Account Detail page, scroll down to the appropriate section.
- 3 In the row whose link you want to remove or delete, choose Remove or Delete from the record-level menu.
 - **Remove.** This disassociates the records without deleting either record.
 - **Delete.** This deletes the linked record. A deleted record is moved to the Deleted Items page and is permanently removed from the database after 30 days.

Related Topics

See the following topics for related information:

- [Attaching Files and URLs to Records](#) (on page 94)
- [Deleting and Restoring Records](#) (on page 100)
- [Tracking Assets](#) (on page 188)

Linking Portfolio Accounts

This feature is specific to Oracle CRM On Demand Financial Services Edition.

You can link portfolio accounts to an account with a many-to-one relationship. In other words, you can link many portfolio accounts to one account, but each portfolio account can be linked to only one account.

Before you begin. The Portfolio related information is not shown on the Account Details page by default. To allow you to see this information, your company administrator must grant access to the Portfolio related information to your role. You or your company administrator must then add the Portfolio related information to your Account Details page layout. For more information on customizing your Detail page layouts, see [Changing Your Detail Page Layout](#) (on page 619).

To link a portfolio subaccount

- 1** Select the parent account.
For information on selecting accounts, see [Finding Records](#) (on page 41).
- 2** On the Account Detail page, scroll to the Portfolio related information, and click New.
- 3** Complete the fields in the Portfolio Account Edit page that is launched.
For more information about portfolio accounts, see [Portfolio Account Fields](#) (on page 522).
- 4** Save the record.

Specifying Parent Accounts

You can indicate account hierarchies, such as a company that is a subsidiary of another company, by specifying a parent-child relationship. First create the parent account and then select that account as the parent for the child or subaccount.

To specify the parent account

- 1** Select the child account.
For instructions on selecting accounts, see [Finding Records](#) (on page 41).
- 2** On the Account Detail page, click Edit.
NOTE: If the inline edit feature is enabled for your company, you can specify the parent account inline on the Account Detail page. For more information on inline editing, see [Updating Record Details](#) (on page 60).
- 3** On the Account Edit page, click the Lookup icon next to the Parent Account field.
- 4** In the Lookup window, select the parent account.
- 5** Save the record.

Related Topics

See the following topics for related information:

- [Finding Records](#) (on page 41)
- [Account Fields](#) (on page 192)

Limiting Account Records Displayed

You can limit the accounts you see by selecting a filtered list. A list shows a subset of the accounts that meet the criteria saved with the list.

Before you begin:

- When you create a list, you need to enter the fields and values for the criteria you set up. You might want to go to the Account Edit page and write down the exact field names and values as they are used in your application. Otherwise, your filtered list may not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names; however, the printout does not capture the field values for drop-down lists.
- If you are using Oracle Offline On Demand (the Offline client), the number of records that you can download at a time is restricted. By default, the Offline client restricts you to downloading 250 accounts at a time. Your company administrator can request an increase in this number. However, increasing the number could increase the amount of time it takes to complete the download process. If your account records exceed the maximum that you are allowed to download, create filtered lists that divide your accounts into smaller amounts, such as accounts based on different Priority values, or on location. Then, during the download process, select the filtered lists that you have created to make sure all your account records are copied to your laptop or desktop.

To open a filtered list for accounts

- 1 Click the Accounts tab.
- 2 From the Account Lists section on the Account Homepage, select the list you want to work with.
For a description of default account filtered lists, see [Working with the Account Homepage](#) (on page 177).

To create a filtered list for accounts

- 1 Click the Accounts tab.
- 2 From the Account Lists section on the Account Homepage, click the Manage Lists link.
- 3 On the Manage Lists page, click the New List button.
- 4 Complete the steps described in [Creating and Refining Lists](#) (on page 73).

Related Topics

See the following topics for related information:

- [Account Fields](#) (on page 192)
- [Working with Activity Lists](#) (on page 121)
- [Working with the Account Homepage](#) (on page 177)

Tracking Partners and Competitors of Accounts

Oracle CRM On Demand provides areas in the application where you can track information on either partners or competitors for your accounts. For example, you might want to track which companies (accounts) you do business with for Account XYZ or which companies (accounts) you compete with for Account XYZ.

To do so, first link the account acting as your partner or competitor to the account record. You can link as many partner or competitor accounts as you want. Then add information, such as the strengths and weaknesses, about the partner or competitor to the Account Partner Edit or Account Competitor Edit page.

NOTE: When you add an account partner or account competitor, a reciprocal record is created under the selected account. For example, if you add Account 123 as an account partner of Account XYZ, you automatically see Account 123 listed in the Account Partner list for Account XYZ.

For information on converting existing accounts to partner accounts, see [Converting Accounts to Partner Accounts](#) (on page 317).

Before you begin. Create an account record for each partner or competitor you want to link to the account. For instructions on adding records, see [Creating Records](#) (on page 38).

To track partner and competitor information for accounts

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 41).

- 2 On the Account Detail page, scroll down to the Account Partners or Account Competitors section, and do one of the following:

- To link an account, click Add.
- To update information, click the Edit link next to the existing partner or competitor.

- 3 On the Account Partner Edit or Account Competitor Edit page, enter the required information.

The following table describes some field information for tracking partner or competitor information.

Field	Comments
Account Partner	Click the Lookup icon, and select the account whose relationship and information you want to track as your partner when dealing with this account. This is a required field.
Account Competitor	Click the Lookup icon, and select the account whose relationship and information you want to track as your competitor for this account. This is a required field.
Role	Select an option that defines the relationship between the accounts. This is a required field.
Reverse Role	Select an option that defines the reverse relationship between the accounts. This is a required field.
Start Date	You can use this field to record the start date of a partnership. The default is today's date. This is a required field.
End Date	You can use this field to record the expiration date of a partnership.
Primary Contact	The most important contact for the partner or competitor relationship.

- 4 Save the record.

Tracking Relationships Between Accounts

This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

When you want to track relationships between accounts, store the information in the Account Relationship pages. For example, you might want to track investor or affiliate relationships for this account.

To do so, first link the account whose relationship you want to track to this account record. (You can link as many accounts as you want.) Then define the relationship and add any other pertinent information.

Before you begin. Create an account record for each organization you want to link to the account. This feature might not be available in your version of the application.

To track relationships between accounts

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 41).

- 2 On the Account Detail page, scroll down to the Account Relationships section and do one of the following:

- To link an account, click Add.
- To update information, click the Edit link in the row for the existing account relationship.

- 3 On the Account Relationship Edit page, enter the required information.

The following table describes some field information for tracking relationships between accounts.

Field	Comments
Related Account	Click the Lookup icon, and select the account whose relationship and information you want to track. This is a required field.
Role	Select an option that defines the relationship between the accounts. This is a required field.
Reverse Role	Select an option that defines the reverse relationship between the accounts. This is a required field.
Start Date	You can use this field to record the start date of the relationship between the accounts. The default is today's date.
End Date	Use this field to record the expiration date of the relationship between the accounts.

- 4 Save the record.

Tracking Assets

When you want to track a product you've sold to a customer or company, link the product record to the account as an asset.

To link a product record to an account as an asset

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 41).

- 2 On the Account Detail page, scroll to the Assets section, and do one of the following:

- To create an asset, click New.

By default, the creator of the asset is the owner of the asset.

- To update asset information, click the Edit link next to the existing asset.

- 3 On the Asset Edit page, enter the required information.

NOTE: If you are using an industry-specific version of Oracle CRM On Demand, assets might be listed under different headings. For example, in Oracle CRM On Demand Automotive Edition, assets are listed as *vehicles*.

The following table describes some fields for tracking asset information. If you are using an industry-specific version of Oracle CRM On Demand, you might see additional fields.

Field	Description
Key Asset Information	
Product Name	Product supplied to the customer. When you link the product record, these fields are copied from the product definition: Product Category, Part #, Type, and Status.
Purchase Price	Price paid for the product.
Quantity	Number of units the customer purchased.
Ship Date	Defaults to today's date.
Product Category	Read-only. Copied from the product definition.
Part #	Read-only. Copied from the product definition.
Type	Read-only. Copied from the product definition.
Operating Status	Default values are Inactive, Active, Idle, Up, Limited Use, Maintenance, Down, Critical Down.
Warranty	Time period of the warranty.
Contract	Type of contract, such as Bronze, Gold, Platinum, or Silver.

Field	Description
Currency	Currency corresponding to the Purchase Price. You can select another currency to convert the price to another currency, if your company administrator set that feature up.
Notify Date	<p>Date that appears in the task record.</p> <p>If you enter a Notify Date on the asset record, a task is created when you save this asset record. The task appears as "Asset <i>Name</i> requires follow-up" on My Homepage, Account Homepage, and Calendar.</p> <p>TIP: Set the date to give you time for follow-up tasks regarding this asset, such as notification that a contract or warranty is about to expire.</p> <p>NOTE: The automatic creation of a task feature is only activated when you enter a notify date on an asset record, not on a contact record.</p>
Additional Information	
Description	Additional information about the asset. Limit of 250 characters.

Tracking Revenue Based on Accounts

Before you begin. This feature is specific to Oracle CRM On Demand Financial Services Edition.

You can track revenue information for each of your accounts, which allows your company to base its forecasts on account revenue. To do so, you add revenue records to accounts.

Adding revenue records to accounts allows you to:

- Track products, product categories, or revenues forecasted for each account
- Base your company's forecasts on account revenue

If your company bases its forecasts on accounts, only records meeting these criteria are included in the forecast:

- Revenue record for the account must have a Status of Open, Pending, or Closed.
- Revenue record for the account must have the Forecast field checked.
- Revenue record cannot be linked to an opportunity.

Before you begin. Your company needs to inform you of the forecasting method that it wants to use. Companies can forecast revenue for any of the following: opportunity revenue, opportunity product quantity and revenue, account revenue, or contact revenue. The company forecasting method determines which fields you need to fill in when adding revenue records to accounts.

To add revenue to accounts

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 41).

2 On the Account Detail page, scroll down to the Revenues section and do one of the following:

- To add a revenue record, click Add.
- To update revenue information, click the Edit link next to the existing revenue record.

3 On the Revenue Edit page, complete the Revenue Fields.

NOTE: If your company does not use account revenue for its forecasts, it is best to leave the Forecast check box blank on the Revenue page.

4 Save the record.

Revenue Fields

The following table describes field information for revenue. Your company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

NOTE: Account and Contact Revenue forecasting require that Revenues be enabled for both Accounts and Contacts. This functionality must be set up for your company. For more information, contact your company administrator.

CAUTION: If your company bases its forecasts on account or contact revenue, the information that you enter for revenue can affect its calculations.

Field	Description
Key Product Information	
Start/Close Date	<p>For an account or contact, the expected revenue close date. For recurring revenue, the start date. For recurring revenue with a close date that ends on the last day of the month and a start date of mid-month, add one record for the full recurring price and another record for the prorated order.</p> <p>For example: You start supplying disposables to a company or client on May 15th. After that, you will be sending \$500 worth of disposables at the end of each month through the end of the year.</p> <p>For the mid-month order, add a record with these values: Revenue = \$250 Quantity = 1</p> <p>For the recurring order, add a second record with these values: Revenue = \$500 Quantity = 1 Frequency = Monthly #of Periods = 7 (June through December).</p>
Product Name	Only products marked Orderable by your company administrator can be selected.
Product Category	Category of the product.
Part #	Number carried over with the product definition. Read-only.
Forecast	Indicator to include this product in forecasting totals.

Field	Description
Type	<p>Default values are Actual, Shipped, Billed, Booked, Projected, and Quota.</p> <p>NOTE: The Type you set applies to the revenue record. Another Type field (read-only field), which is populated with the product information, might also appear on this page.</p>
Status	<p>If your company calculates forecasts on accounts or contacts, you must set the Status to Open, Pending, or Closed for this record to be included in the forecasts.</p> <p>NOTE: The Status you set applies to the revenue record. Another Status field (read-only field), which is populated with the product information, might also appear on this page.</p>
Quantity	<p>Number of units the customer orders. For a recurring product, enter the quantity of the product per recurring period. For example, if you send 10 printer cartridges each month, enter 10 here.</p>
Revenue	<p>Quantity multiplied by Price. The revenue cannot be overwritten. If the Forecast check box is selected, this revenue amount contributes to your company's forecast totals.</p> <p>TIP: To forecast a specific revenue value, independent of the product or product category, set the quantity to 1 and the price equal to the revenue value.</p>
Description	<p>Additional information about the product. Limit of 16,350 characters.</p>
Recurring Revenue Information	
Frequency	<p>Indicates the frequency for a recurring product.</p> <p>The term <i>bi-weekly</i> means once every two weeks.</p> <p>When you populate this field, you must also populate the # of Periods field.</p>
# of Periods	<p>The number of periods for a recurring product. Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency selected (in the Frequency field). For example, if you have weekly recurring revenue, you can track revenue for up to five years.</p> <p>NOTE: When you populate this field, you must also populate the Frequency field.</p>
Additional Information	
Owner	<p>Person assigned to this revenue record. Generally, the owner can update record details or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p> <p>Each record has only one owner. However, account, contact, and opportunity records can be shared with other employees. For instructions, see Sharing Records (Teams) (on page 84).</p>

Analyzing Account Performance

The Account Analysis section of the Account Homepage displays an analysis of how accounts are distributed and the closed revenue. You can identify the top-performing customers and underperforming customers, as well as the new market segments.

In this section of the Account Homepage, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view the same data from another perspective.

Account Fields

Use the Account Edit page to add an account or update details for an existing account. The Account Edit page shows the complete set of fields for an account.

TIP: You can also edit accounts on the Account List page and the Account Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

Account records are central to how you manage and view your data. As a result, you should enter as much information about accounts as you can. Some of that information, such as Region or Industry, can be used in reports as a way to categorize information. Similarly, if you link a record, such as an opportunity, to an account record with Region or Industry filled in, those opportunities can be categorized by those values.

The following table provides additional information regarding some fields.

Field	Description
Key Account Information	
Account Name	Name of the account. To avoid duplicate records, make sure you follow the naming conventions your company has set up for abbreviations, capitalization, and so on.
Location	Type of facility operated by the account at this site, such as Headquarters.
Parent Account	Company that the account is a subsidiary of.
Web Site	URL address for the account.
Account Sales Information	
Account Type	<p>Relationship of the account to your company, such as Prospect, Customer, Partner, or Competitor.</p> <p>Note: Accounts designated as a Partner or Competitor appear under the All Competitor and All Partner Accounts lists available from the Account Homepage.</p> <p>They are also included in the list of accounts you can link to other accounts or opportunities from the Account or Opportunity Detail page. At that point, you can define the exact role that the account plays, such as Reseller, Vendor, or Partner, and track the partner and competitor information for every account and opportunity.</p>

Field	Description
Priority	Priority for the account, such as High, Medium, or Low.
Industry	Type of business engaged in by the account, such as Manufacturing, High Technology, Financial Services, Retail, Automotive, Pharmaceuticals, Telecommunications, Energy, Services, or Other. If you want to view report information, such as opportunities, by Industry, select an Industry for the account and then link the opportunity record to the account.
Public Company	Indication that the account is a publicly-owned company.
Region	Region the account falls under at your company. If you want to view report information, such as opportunities, by Regions, select a Region for the account and then link the opportunity record to the account.
Status	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Last Call Date	This field is specific to Oracle CRM On Demand Life Sciences Edition.
HIN	Health Industry Number. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Influence Type	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Call Frequency	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Source Campaign	The campaign that generated the account. If the account is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the account is created by a user, the user can enter the information in this field.
Annual Revenues	Amount of the company's annual revenue.
Market Segment	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Potential	This field is specific to Oracle CRM On Demand Life Sciences Edition.
YTD Revenue	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Share	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Reference	Indication that the account can be used as a reference for potential customers or sales representatives to contact.
Reference as of	Date the account becomes a reference.
Account Partner	Indication that this account is a partner.
Number of Physicians	Number of physicians working at a health care site, such as a hospital or clinic. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Route	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Additional Information	

Field	Description
Billing and Shipping Addresses	<p>Selecting a country determines the labels for the remaining address fields, according to that country's address convention. You might see the screen refresh to adjust the field names.</p> <p>If you add a contact and link it to this account, the Billing address for the account is carried over to the Account address section for that contact.</p>
Owner	<p>Alias of the record owner. Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access. In order to reassign ownership of an account, you must have Read/Edit/Delete access to the account.</p> <p>NOTE: If group ownership is enabled for your company, the group team members will automatically change if the new owner is a member of a different group.</p> <p>The value in the Owner field affects which records are included in the reports that you or your managers run.</p> <p>Each record has only one owner. However, account records can be shared with other employees through the Account Team page. For more information, see Sharing Records (Teams) (on page 84).</p>
Reassign Account	<p>Indicates that the account should be reassigned. If your company administrator has set up account assignment rules, selecting this field triggers assignment manager to process the account again and assign it according to the rules.</p> <p>NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and the current system load. In the case of accounts, the processing time is also affected by the number of team members and the number of contacts and opportunities associated with the record. The owner name changes when the record is reassigned.</p>
Territory	Territory that this account belongs to.
Description	Additional information about the account. This field has a limit of 16,350 characters.

Related Topics

See the following topic for related information:

- [Managing Accounts](#) (on page 179)

Contacts

Use the Contact pages to create, update, and track contacts. *Contacts* are individuals that your company currently conducts business with or expects to conduct business with in the future. These individuals can be employees of other companies, independent consultants, vendors, or personal acquaintances. A contact is generally associated with an account, and often, an account record includes links to information about several different contacts at that company.

Within Oracle CRM On Demand Financial Services Edition, a contact is often designated as a client to support functionality that is specific to Oracle CRM On Demand Financial Services Edition. Designating a contact as a client indicates that this is a contact with whom your company maintains a long-term relationship so that you can monitor changes in the client's situation and identify opportunities to cross-sell additional products to the client.

Related Topics

See the following topic for related information:

- [Managing Contacts](#) (on page 197)

Working with the Contacts Homepage

The Contacts Homepage is the starting point for managing contacts.

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

Creating a Contact

You can create a contact by clicking the New button in the My Recently Viewed Contacts section. For more information, see [Creating Records](#) (on page 38) and [Contact Fields](#) (on page 206).

Working with Contact Lists

The Contact Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for contacts.

Contact List	Filters
All Contacts	No filter is available. This list displays all records to which you have visibility, regardless of the owner.
All Customer Contacts	Contacts where the Type field is set to Customer
My Contacts	Contacts with your user name in the Owner field
My Recently Created Contacts	Contacts with your user name in the Owner field, sorted by the created date
My Recently Modified Contacts	Contacts with your user name in the Owner field, sorted by the modified date
Recently Created Contacts	All contacts, sorted by the created date
Recently Modified Contacts	All contacts, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Contacts

The My Recently Viewed Contacts section shows the contacts that you viewed most recently.

To expand the list, click Show Full List.

Working with Contact Tasks

The My Open Contact Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.

- To review a task, click the Subject link.
- To review the contact with which the task is associated, click the contact name.
- To expand the list of tasks, click Show Full List.

Using Reports to Analyze Contacts

One or more report sections might be shown on your Contacts Homepage (your company administrator can specify which report sections are shown on the page). In the standard edition of Oracle CRM On Demand, the Contact Analysis by Account section is shown, which displays contacts by account criteria, such as Region, State/Province, or Industry. For information about using the Contact Analysis by Account section, see [Analyzing Contacts](#) (on page 205).

Adding Sections to Your Contacts Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Contacts Homepage, depending on which sections your company administrator has made available for display on your Contacts Homepage.

To add sections to your Contacts Homepage

- 1 On the Contacts Homepage, click Edit Layout.
- 2 On the Contacts Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.

- 3 Click Save.

Managing Contacts

To manage contacts, perform the following tasks:

- [Importing Your Contacts](#) (on page 198)
- [Linking Contacts to Multiple Accounts](#) (on page 201)
- [Tracking Relationships Between Contacts](#) (on page 202)
- [Tracking Revenue Based on Contacts](#) (on page 203)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Adding Referrals](#) (on page 204)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Tracking Contact Interests](#) (on page 204)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Analyzing Contacts](#) (on page 205)

- [Tracking the Best Calling Times](#) (on page 205)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Adding Contact State Licenses](#) (on page 205)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Sharing Records \(Teams\)](#) (on page 84)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Importing Your Contacts

As a nonadministrator, you can import up to 2000 contacts at a time from a comma-separated value (.csv) file to use with Oracle CRM On Demand.

When you import contacts, you specify how you want Oracle CRM On Demand to handle duplicate records.

Several utilities are available from the Import and Export Tools page, which augment the import and export facilities in Oracle CRM On Demand:

- **Import Assistant.** For more information, see [Import Assistant](#) (on page 1447).
- **Oracle Data Loader On Demand.** For more information, see [Oracle Data Loader On Demand Client Utility](#) (on page 1457).
- **Oracle Migration Tool On Demand.** For more information, see [Oracle Migration Tool On Demand Client Utility](#) (on page 1462).
- **Oracle Web Services.** For more information, see [Web Services Integration](#) (on page 1457).

For more information about choosing an appropriate import method, see 1089184.1 (Article ID) on My Oracle Support. For more information on importing and exporting in Oracle CRM On Demand, see [Import and Export Tools](#) (on page 1282).

NOTE: Company administrators can import up to 30,000 contact records at one time, with a maximum file size of 20 MB.

Before you begin. If several employees at your company are importing contacts, coordinate the importing effort to minimize record duplication. Also, prepare your file for importing to make sure you capture all the data in the file.

CAUTION: You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5-10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on importing data. For information on those resources, click the Training and Support link at the top of each page within Oracle CRM On Demand.

To import your contacts

- 1 Click the Contacts tab.
- 2 In the Recently Modified Contacts title bar, click Import.

NOTE: If the Recently Modified Contacts section is not visible on your Contacts Homepage, click the Edit Layout link in the upper right corner of the page, and add the Recently Modified Contacts section to your page layout.

- 3 On the Data and Integration Tools page, in the Personal Import and Export Tools section, click Import Your Contacts.

This starts the import assistant.

- 4 In Step 1 of the import assistant:

- a Select how you want the import assistant to identify matching records.

The import assistant uses an external unique ID, which is a unique external ID field that is imported from another system. The import assistant also uses Oracle CRM On Demand predefined fields.

For information on how duplicate records are defined, see [About Record Duplicates and External IDs](#) (on page 1302).

- b Select what you want the import assistant to do if it finds a duplicate unique record identifier in Oracle CRM On Demand. Your choices are: not to import duplicate records, to overwrite existing records, or to create additional records.

- c Select the action you want the import assistant to follow if the imported record's unique record identifier does not match an existing record in Oracle CRM On Demand.

NOTE: If you select **Overwrite Records and Don't Create New Record** in the previous option, this results in the record being updated.

- d Decide if the import assistant should create a new record for missing associations (related records) in your data file.

- e Select the date/time format used in the CSV file.

For more information, see [Field Type Guidelines for Importing Data](#) (on page 1319).

- f Verify that the file encoding selection is Western European.

NOTE: You should not change this unless you are certain another encoding method is used. The default, Western European, applies to most encoding systems in Europe and North America.

- g Select the type of CSV delimiter used in your file: comma or semi-colon.

- h Select what you want Oracle CRM On Demand to log from the Error Logging menu: all messages, errors and warnings, or errors only.

- i Select the CSV file whose data you want to import.

5 In Step 2 of the import assistant:

- a Follow the instructions for validating your file, if necessary.

- b Select a field mapping file, if available.

Field mapping files (.map) contain the pairing of fields in your CSV file with existing Oracle CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.

6 In Step 3 of the import assistant, map the fields in your file to Oracle CRM On Demand fields. At a minimum, you must map all required fields to the column headings in the CSV file.

The import assistant lists the column headings from your import CSV file next to a list showing all the fields in that area in Oracle CRM On Demand, including the custom fields that you added.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

If you selected a .map file, verify that the fields map correctly. Custom fields created since you ran the previous import might need to be mapped.

For information about external IDs, see [About Record Duplicates and External IDs](#) (on page 1302).

CAUTION: If you have selected the wrong file to import, click **Cancel** to change selections. At this point, using the **Back** button does not clear the cache, so the import file you originally selected appears in the field mapping step.

CAUTION: External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

- 7** In Step 4 of the import assistant, follow the onscreen instructions, if necessary.
- 8** In Step 5 of the import assistant, click **Finish**.

To view the queue for your import requests

- 1 Click the Contacts tab.
- 2 In the Recently Modified Contacts title bar, click the Import button.
- 3 On the Data and Integration Tools page, click the Import Request Queue link.

The Import Request Queue page appears with information about your requests, including the estimated time of completion.

The following table describes the import status.

Status	Description
Completed	The import completed with no errors during import.
Completed with Errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every 20 seconds, or as set by a system process.
# Successfully Imported	The number of records that were imported without any problems.
# Partially Imported	The number of records that were imported. Not all records were imported.
# Not imported	The number of records that were not imported at all.

Linking Contacts to Multiple Accounts

You can link a contact to more than one account. To do this, your role and your setup must be configured as follows:

- Your company administrator must include the Manage Extended Contact and Account Relationship Access privilege in your user role.
- Your Contact Detail Page layout must include the Accounts related information. For information about changing your page layout, see [Changing Your Detail Page Layout](#) (on page 619).

For more information about linking records, see [Linking Records to Your Selected Record](#) (on page 61).

Tracking Relationships Between Contacts

This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

When you want to track relationships between contacts, store the information in the Contact Relationship pages. For example, you might want to track influential relationships, such as personal relationships, business relationships, and industry peers for this contact.

To do so, first link the contact whose relationship you want to track to this contact record. (You can link as many contacts as you want.) Then define the relationship and add any other pertinent information.

Before you begin. Create a contact record for each person you want to link to the contact.

To track relationships between contacts

- 1 Select the contact.

For instructions on selecting contacts, see [Finding Records](#) (on page 41).

- 2 On the Contact Detail page, scroll down to the Contact Relationships section and do one of the following:

- To link a contact, click Add.
- To update information, click the Edit link in the row for the existing contact relationship.

- 3 On the Contact Relationship Edit page, enter the required information.

The following table describes some fields for tracking relationships between contacts.

Field	Comments
Related Contact	Click the Lookup icon, and select the contact whose relationship and information you want to track. This is a required field.
Role	Select an option that defines the relationship between the contacts. This is a required field. The default values are: None Specified, Child, Lawyer, Spouse, Accountant, Assistant, Investor, Banker, Lived with, Subordinate, Superior, Known Associate, Competitor, Relative, or Agent. Your company administrator can change or add values to the drop-down list.

Field	Comments
Reverse Role	<p>Select an option that defines the reverse relationship between the contacts. This is a required field.</p> <p>The default values are: None Specified, Child, Lawyer, Spouse, Accountant, Assistant, Investor, Banker, Lived with, Subordinate, Superior, Known Associate, Competitor, Relative, or Agent. Your company administrator can change or add values to the drop-down list.</p>
Start Date	The default is today's date. You can use this field to record the start date of the relationship between the contacts.
End Date	Use this field to record the expiration date of the relationship between the contacts.

Tracking Revenue Based on Contacts

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

You can track revenue information for each of your contacts, which allows your company to base its forecasts on contact revenue. To do so, you add revenue records to contacts.

Adding revenue records to contacts allows you to:

- Track products, product categories, or revenues forecasted for each contact
- Base your company's forecasts on contact revenue

If your company bases its forecasts on contacts, only records meeting these criteria are included in the forecast:

- Revenue record for the contact must have a Status of Open, Pending, or Closed.
- Revenue record for the contact must have the Forecast field checked.
- Revenue record cannot be linked to an opportunity.

Before you begin. Your company needs to inform you of the forecasting method that it wants to use. Companies can forecast revenue on opportunity, opportunity product, account, contact revenue, or product quantity, but only on one of those. The company forecasting method determines which fields you need to fill in when adding revenue records to contacts.

To add revenue to contacts

- 1 Select the contact.
For instructions on selecting contacts, see [Finding Records \(on page 41\)](#).
- 2 On the Contact Detail page, scroll down to the Revenues section and do one of the following:
 - To link a revenue record, click Add.

- To update revenue information, click the Edit link next to the existing revenue record.
- 3 On the Revenue Edit page, complete the Revenue Fields, see [Tracking Revenue Based on Accounts](#) (on page 189).
NOTE: If your company does not use contact revenue for its forecasts, it is best to leave the Forecast check box blank on the Revenue page.
- 4 Save the record.

Adding Referrals

This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

You can add referrals to your contact record. When you create a new referral, the record is saved as a new lead record.

To add a referral

- 1 Select the contact.
For instructions on selecting contacts, see [Finding Records](#) (on page 41).
- 2 On the Contact Detail page, scroll down to the Referral section and click New.
- 3 On the Referral Edit page, enter the required information.
- 4 Save the record.
The new referral shows a status of Qualifying by default.

Tracking Contact Interests

This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

You can track products, services, or hobbies a contact is interested in, such as mutual funds or golf.

To track contact interests

- 1 Select the contact.
For instructions on selecting contacts, see [Finding Records](#) (on page 41).
- 2 On the Contact Detail page, scroll down to the Contact Interests section and click Add.
- 3 On the Contact Interests page, fill in the required information.
- 4 Save the record.

Analyzing Contacts

The Contact Analysis by Account section of the Contacts Homepage shows a chart that allows users to analyze their total number of contacts by account criteria, such as Region, State/Province, or Industry. With this information, users can see their contact distribution and identify areas of opportunity or weakness.

In this section of the Contacts Homepage, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down list to view the same data from another perspective.

Tracking the Best Calling Times

To record and track the best time to call on a contact (typically, a physician or another health care provider), complete the following procedure to add the best calling time. Creating this record allows you to track when a contact is available at a given location.

NOTE: If you do not see the Best Times section in your Contact Detail page, add this section as described in [Changing Your Detail Page Layout](#) (on page 619), or contact your company administrator. This feature is available in Oracle CRM On Demand Life Sciences Edition only.

To track the best calling time

- 1 From the Contact Detail page, scroll to the Best Times section, and click New.
- 2 Complete the fields described in the following table.

Field	Description
Day	The planned day of the call, for example, Monday. Use the picklist to select a day. (Required)
Start Time	The planned start time for the call, for example, 11:00 a.m. (Required)
End Time	The planned end time for the call, for example, 1:00 p.m. or 13:00. (Required)
Comments	A description of the call.
Street Address	The street address of the contact. Use the Lookup selector to choose the address. (Required)

- 3 Save the record.

Adding Contact State Licenses

A license to practice medicine is used to validate signatures for samples that are dropped off by a sales representative (for example, a pharmaceutical sales representative) to a contact (for example, a physician). A physician must have a valid medical license for the state in which the physician practices medicine. A *contact state license record* captures the license information for the contact, typically a physician.

To add a state license record for a contact, complete the following procedure.

NOTE: If you do not see the Contact State License related item section in your Contact Detail page, add that related item section as described in [Customizing Related Item Layouts](#) (on page 1056), or contact your company administrator. This feature is available in Oracle CRM On Demand Life Sciences Edition only.

To add a contact state license

- 1 From the Contact Detail page, scroll to the Contact State License section, and click New.
- 2 Complete the fields in the following table and save the record.

Field	Description
Contact	The contact for this state license record, typically a physician or pharmaceutical representative. Use the Book selector to choose a contact.
License Number	The license number for the contact, for example, PS4231732. (Required.)
State	The U.S. state or jurisdiction associated with the license number. Use the picklist list to select the state, for example, <i>NJ</i> for New Jersey. NOTE: If your jurisdiction is non-U.S., this field is not required.
Expiration Date	The date when the license expires (MM/DD/YYYY), for example, 10/31/2009. Click the calendar icon to select the expiration date.
Status	The status of the license (Active or Inactive). Choose the status using the picklist.

Contact Fields

Use the Contact Edit page to add a contact or update details for an existing contact. The Contact Edit page shows the complete set of fields for a contact.

TIP: You can also edit contact information on the Contact List page and the Contact Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Contact Information	

Account	Account the contact is linked to. NOTE: It is possible to link a contact to more than one account; see Linking Contacts to Multiple Accounts (on page 201) for more information.
Opt In	Used in the U.S. and Europe to indicate that a customer has explicitly chosen to participate in either their information sharing or marketing communications.
Opt Out	Used in the U.S. and Europe to indicate that a customer has explicitly chosen <i>not</i> to allow their information to be shared or has chosen not to receive marketing communications.
Contact Detail Information	
Contact Type	The type of contact, such as Prospect, Qualified Lead, Customer, Partner, Client, and Competitor. The Client value is specific to Oracle CRM On Demand Financial Services Edition. NOTE: If you select the Client value in this field, then the Client Since Date field is automatically populated with the current date.
Department	Name of the department of the contact.
Manager	Name of the manager of the contact.
Lead Source	Lead source of the contact, such as Advertisement, Direct Mail, Email, Web Site, and Other.
Source Campaign	The campaign that generated the contact. If the contact is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the contact is created by a user, the user can enter the information in this field.
Assistant Name	Name of the contact's assistant.
Assistant Phone #	Phone number of the contact's assistant.
Private	Indicates that the contact is private and cannot be viewed by other users.
Never Email	Indicates that the contact does not want to receive email.
Degree	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN, and Master of Public Health. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Potential	Default values are High, Medium, and Low. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Call Frequency	Default values are No See, 1-2 Times/Year, 3-4 Times/Year, and >5 Time/Year. This field is specific to Oracle CRM On Demand Life Sciences Edition.
YTD Sales	This field is specific to Oracle CRM On Demand Life Sciences Edition.

Route	Default values are Route 1, Route 2, Route 3, and Route 4. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Last Call Date	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Best Time to Call	Indicates the best time of day to reach a contact. Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning, and Saturday. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Additional Information	
Account address fields	Primary address. Inherited from the account linked to the contact. Read only.
Contact address fields	Alternate address of the contact.
Owner	<p>Alias of the record owner. Generally, the owner can update record details, transfer a record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p> <p>Each record has only one owner. However, contact records can be shared with other users through Contact Team or Account Team pages. For instructions, see Sharing Records (Teams) (on page 84).</p>
Description	Additional information about the contact. This field has a limit of 16,350 characters.
Available Section	
Current Investment Mix	Default values are Aggressive, Moderate, and Conservative. This field is specific to Oracle CRM On Demand Financial Services Edition.
Objective	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth, and International Diversification. This field is specific to Oracle CRM On Demand Financial Services Edition.
Segment	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth. This field is specific to Oracle CRM On Demand Financial Services Edition.
Experience Level	Default values are None, Limited, Good, and Extensive. This field is specific to Oracle CRM On Demand Financial Services Edition.
Risk Profile	Default values are Conservative, Moderate, and Aggressive. This field is specific to Oracle CRM On Demand Financial Services Edition.
Primary Goal	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets, and Retirement. This field is specific to Oracle CRM On Demand Financial Services Edition.

Life Event	Default values are Marriage, Birth of Child, Retirement, Divorce, and Other. This field is specific to Oracle CRM On Demand Financial Services Edition.
Investment Horizon	Default values are Short term, Medium term, and Long term. This field is specific to Oracle CRM On Demand Financial Services Edition.
Tier	Default values are Gold, Silver, Bronze, Top 100, Top, Medium, and Low. This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Liabilities	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Net Worth	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Income	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Assets	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Expenses	This field is specific to Oracle CRM On Demand Financial Services Edition.
Credit Score	This field is specific Oracle CRM On Demand Financial Services Edition.
Marital Status	Default values are Single, Divorced, Married, Partner, Separated, Widowed, and Widower. This field is specific to Oracle CRM On Demand Financial Services Edition.
Own or Rent	Default values are Own or Rent. This field is specific to Oracle CRM On Demand Financial Services Edition.
Home Value	This field is specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	This field is specific to Oracle CRM On Demand Financial Services Edition.
Tax Bracket	This field is specific to Oracle CRM On Demand Financial Services Edition.
Customer ID	This field is specific to Oracle CRM On Demand Financial Services Edition.
Gender	Default values are F and M. This field is specific to Oracle CRM On Demand Financial Services Edition.
Self-Employed	This field is specific to Oracle CRM On Demand Financial Services Edition.
Client Since Date	Automatically populated with the current date when the Contact Type is set to Client. This field is specific to Oracle CRM On Demand Financial Services Edition.
Referred By	The person who referred the contact. This field is specific to Oracle CRM On Demand Financial Services Edition.
Qualified Date	Automatically populated with the current date when the client is qualified. This field is specific to Oracle CRM On Demand Financial Services Edition.
Status	Status of the Contact. Default values are Active, Quiet Filed, or Dead Filed. This field is specific to Oracle CRM On Demand Financial Services Edition.
Profession	The client's profession. This field is specific to Oracle CRM On Demand Financial Services Edition.

Opportunities

Use the Opportunity pages to create, update, and track opportunities. *Opportunities* are potential sales deals that, at some point, might be included in revenue forecasting.

You can create an opportunity by converting a qualified lead to an opportunity, or you can create a new opportunity for an existing account or contact.

Opportunity records help you to manage your sales pipeline as you work to close deals. All of your opportunity information is visible in one place and is linked to related lead, contact, and account information. This information gives you a complete picture of your opportunity and your customer.

About Opportunities and Forecasts

An *opportunity* is a potential revenue-generating transaction that can be included in your sales forecast when it reaches a specific point in your sales process. For an opportunity or product revenue record to be considered for inclusion in a forecast, the record must have a close date within the forecast period and be owned by a forecast participant. The forecast periods and participants are determined as part of the forecast definition. For more information about forecasts, see [Forecasts](#) (on page 228).

Tips for Managing Your Opportunity Records

Updating your opportunity information as you work to close a deal facilitates clear team communication and ensures accurate forecasts and reports. It is particularly important to keep certain fields on the Opportunity Detail page up to date:

- The Revenue, Close Date, and Sales Stage fields are critical for tracking pipeline history and are used for trend analyses and forecasting.
- If your company bases its forecasts on opportunities, select the Forecast check box on an opportunity record to add the opportunity to your forecasted revenue at the appropriate time in the sales process. If your company bases its forecasts on products, select the Forecast check box on your linked products instead.

Sales Stages

Every sales process is defined by specific stages. Each sales stage has certain activities and deliverables, or tasks that must be completed before the opportunity is advanced to the next sales stage. As you work on an opportunity, you evaluate it against clearly defined criteria for each stage in your company's sales cycle.

- As criteria are met, update the Sales Stage field in your opportunity record.
- The Probability percentage field on the opportunity record defaults to a value related to the selected sales stage for the opportunity. You can change this value, if needed, to better reflect your particular opportunity while it is in that sales stage. However, when the sales stage changes, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage, unless the Mass Update feature is used to change the sales stage. If you use the Mass Update feature to change the value in the Sales Stage field on one or more records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage.

- The Expected Revenue field displays a currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field. This figure is used for forecasting.
- Update the Next Step field to reflect the criteria for the next stage in the sales cycle.

Forecasting

When Oracle CRM On Demand generates forecasts, it determines which records, fields, and data to include according to your forecasting method. If certain conditions are met, it includes those records in the forecasts:

- **Close Date.** Oracle CRM On Demand verifies that the close date for the opportunity or product revenue record falls within the forecast period:
 - If your company's forecasts are based on opportunity revenue, the opportunity record (either alone or linked to products) must show a close date that falls within the forecast period.
 - If your company's forecasts are based on product revenue, the product revenue record must show a close date that falls within the forecast period.

- **Expected Revenue.** Oracle CRM On Demand calculates the expected revenue forecast data, as follows:

Calculates the total for the Expected Revenue fields in either the opportunity or product revenue records and displays the sum in the Expected Revenue field in the Forecast record.

NOTE: For the opportunity expected revenue to accurately reflect expected revenue based on opportunity products, the user must click the Update Opportunity Totals button. This functionality is only available if the Product Probability Averaging Enabled option is enabled on the company profile. The functionality ensures that the probability percentage (as recorded in the Probability % field) for each product revenue record is included as part of the calculation.

- **Pipeline.** Oracle CRM On Demand calculates the pipeline forecast data, as follows: it calculates the total for the Revenue fields in either the opportunity or product revenue records for all prospective deals within the forecast period, regardless of the status, and displays the sum in the Pipeline field in the forecast record.

NOTE: For recurring product revenues, only the revenue amount that pertains to the forecast period is included, not the total product revenue.

- **Forecast.** Oracle CRM On Demand retrieves the Revenue field data from records with the Forecast check box selected and displays the sum in the Forecast field in the forecast record:
 - If your company bases its forecasts on opportunities, opportunity records with the Forecast check box selected are included.
 - If your company bases its forecasts on products, product revenue records with the Forecast check box selected are included.

NOTE: The Forecast flag indicates that there is a high probability that the opportunity will close. So, when this flag is selected, the corresponding revenue is included in your forecasted revenue totals.

The Forecast flag does not determine whether an opportunity or product revenue record is part of your overall forecast record.

- **Closed Revenue.** Oracle CRM On Demand retrieves Revenue field data from records with a sales stage of Closed-Won and displays the total in the Closed Revenue field of the Forecast record:
 - If your company bases its forecasts on opportunities, opportunity records with a close date within the forecast period are included.

- If your company bases its forecasts on products, product revenue records with a start/close date within the forecast period are included.

NOTE: For recurring product revenues, only the revenue amount that pertains to the forecast period is included, not the total product revenue.

Working with the Opportunity Homepage

The Opportunity Homepage is the starting point for managing opportunities.

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

Creating an Opportunity

You can create an opportunity by clicking the New button in the Recently Viewed Opportunities section. For more information, see [Creating Records](#) (on page 38) and [Opportunity Fields](#) (on page 226).

Working with Opportunity Lists

The Opportunity Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for opportunities.

Opportunity List	Filters
All Opportunities	All opportunities to which you have visibility
All Closed Opportunities	The opportunities where the Sales Stage field is set to Closed/Won
All Large Opportunities	The opportunities where the revenue is greater than 100,000
Recently Created Opportunities	All opportunities to which you have visibility, sorted by the created date
Recently Modified Opportunities	All opportunities to which you have visibility, sorted by the modified date
My Forecast Opportunities	The opportunities where the Forecast check box is selected
My Opportunities	The opportunities where your name is in the Owner field
My Top Opportunities	The opportunities that you own where the Priority field is set to High

Opportunity List	Filters
My Recently Created Opportunities	All opportunities that you created, sorted by the created date
My Recently Modified Opportunities	All opportunities that you modified, sorted by the created date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Opportunities

The My Recently Viewed Opportunities section shows the opportunities that you viewed most recently.

To expand the list, click Show Full List.

Working with Opportunity Tasks

The My Open Opportunity Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date or priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.

- To review a task, click the Subject link.
- To review the opportunity with which the task is associated, click the opportunity name.
- To expand the list of tasks, click Show Full List.

Using Reports to Analyze the Pipeline

One or more report sections might be shown on your Opportunity Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Pipeline Analysis for Current Quarter section is shown, which displays a quarterly analysis of the pipeline in chart format. For information about using the Pipeline Analysis for Current Quarter section, see [Analyzing the Pipeline](#) (on page 221).

Adding Sections to Your Opportunity Homepage

If your user role includes the Personalize Homepages privilege, you can add more sections to your Opportunity Homepage, depending on which sections your company administrator has made available for display on your Opportunity Homepage.

To add sections to your Opportunity Homepage

- 1 On the Opportunity Homepage, click Edit Layout.
- 2 On the Opportunity Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Opportunities

To manage opportunities, do the following tasks:

- [Tracking Partners and Competitors of Opportunities](#) (on page 214)
- [Accessing the Sales Process Coach](#) (on page 215)
- [Linking Products to Opportunities](#) (on page 216) (allows tracking of product revenue)
- [Analyzing the Pipeline](#) (on page 221)
- [Creating a Special Pricing Request from an Opportunity](#) (on page 221)
- [Specifying Parent and Child Opportunities](#) (on page 222)
- [Creating a Deal Registration from an Opportunity](#) (on page 223)
- [Splitting Opportunity Revenue Among Team Members](#) (on page 224)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Viewing Audit Trails for Records](#) (on page 105)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Tracking Partners and Competitors of Opportunities

Oracle CRM On Demand provides areas where you can track information about partners or competitors of your opportunities. For example, you might want to track which companies (accounts) you do business with for Opportunity XYZ or which companies (accounts) you compete with for Opportunity XYZ.

To do so, first link the account acting as your partner or competitor to the opportunity record. (You can link as many partner or competitor accounts as you want.) Then add information to the Opportunity Partner or Competitor Edit page about the partner or competitor, such as its strengths and weaknesses.

Before you begin. Create an account record for each partner or competitor you want to link to your opportunity. For information on adding records, see [Creating Records](#) (on page 38).

To track partner and competitor information of opportunities

- 1 Select the opportunity.

For instructions on selecting opportunities, see [Finding Records](#) (on page 41).

- 2 On the Opportunity Detail page, scroll to the Opportunity Partners or Opportunity Competitors section and do one of the following:

- To link an account, click Add.
- To update information, click the Edit link next to the existing partner or competitor.

- 3 On the Opportunity Partner or Opportunity Competitor Edit page, enter the required information.

The following table describes some field information for tracking partner or competitor information.

Field	Comments
Opportunity Partner	Click the Lookup icon, and select the account whose relationship and information you want to track as your partner with this opportunity. This is a required field.
Opportunity Competitor	Click the Lookup icon, and select the account whose relationship and information you want to track as your competitor for this opportunity. This is a required field.
Role	Select an option that defines the relationship between your opportunity and this account. This is a required field.
Reverse Role	Select the option that defines the reverse relationship or role. This is a required field.
Start Date	Use this field to record the start date of a partnership. The default is today's date. This is a required field.
End Date	Use this field to record the expiration date of a partnership.
Primary Contact	Key partner or competitor contact for this opportunity.

- 4 Save the record.

Accessing the Sales Process Coach

At each sales stage of an opportunity, your company might need to collect specific information, according to their business practices. To guide you in completing the information, your company administrator can set up follow-up tasks, require that you fill in specific information, and add information for you to review at each phase of the sales process.

Note: Your company can set up different sales processes (stages, probabilities, and coaching information) for different roles and different opportunity types. For example, if some sales representatives sell products while others sell services, they might be linked to different roles and, as a result, see different options for sales stages and different guidelines in the sales process coach.

To access the coach information relating to the sales stages

- 1 Select the opportunity.

For instructions on selecting opportunities, see [Finding Records](#) (on page 41).

- 2 On the Opportunity Detail page, click the Coach button.

- 3 Review the Process Coach page for information that your company administrator set up, and update the opportunity record accordingly.

TIP: You can print the information by right-clicking on the Process Coach page.

NOTE: In the Useful Resources section, click View in the row of any attachment for further information.

- 4 To update the opportunity, click Edit and revise the record information to meet the coach instructions.

- 5 Save the opportunity record.

- 6 When you update the Sales Stage field, the application prompts you to fill in required fields. Also, some fields might default to certain values, but you can update those.

- 7 Click Close in the Process Coach window.

If your company administrator has set it up, some tasks are added to this opportunity and this opportunity's linked account when you save the record.

Related Topics

See the following topic for related information:

- [Setting Up Sales Processes, Categories, and Coaches](#) (on page 1274)

Linking Products to Opportunities

You can link products to opportunities to:

- Track which products belong to the opportunity
- Calculate opportunity revenue based on product revenue
- Base your company's forecasts on product revenue or product quantities

You can also link a product to an opportunity when you create the opportunity. If your company administrator has enabled the Save and Add Product button on the Opportunity Edit page, you can click the Save and Add Product button to save the new opportunity record and navigate directly to the Product Revenue Edit page. If

you cancel adding the product revenue record, then Oracle CRM On Demand displays the Opportunity Detail page for the previously saved opportunity record.

Before you begin. Your company needs to inform you of the forecasting method it wants to use. The company forecasting method determines which fields you must select when linking products to your opportunities.

NOTE: You click the Update Opportunity Totals button to calculate the opportunity revenue based on product revenue. The calculation behind this functionality differs depending on whether the Product Probability Averaging Enabled option is enabled on the company profile.

The following conditions apply to the calculation:

- If the Product Probability Averaging Enabled option is enabled, the Update Opportunity Totals button will update the Opportunity Revenue and the Opportunity Probability based upon each linked product. Therefore, the Expected Revenue will be calculated based upon the average probability for all linked products.
- If the Product Probability Averaging Enabled option is not enabled, the Update Opportunity Totals button will update the Opportunity Revenue based upon the total product revenue for each linked product. The Opportunity Probability value is not updated; therefore, the Expected Revenue will be calculated based upon the existing percentage.

For the Update Opportunity Totals button to work correctly, the Quantity and Revenue fields on the Product Revenue Edit page must be displayed and populated. Your company administrator can customize your page layout to make these fields available.

To link products to opportunities

- 1 Select the opportunity.

For instructions on selecting opportunities, see [Finding Records](#) (on page 41).

- 2 On the Opportunity Detail page, scroll down to the Opportunity Product Revenues section and do one of the following:
 - To link a product, click Add.
 - To update product information, click the Edit link next to the existing product.
- 3 On the Opportunity Product Revenue Edit page, fill in the Quantity, Purchase Price, and Close Date fields.
- 4 If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.
- 5 If your company forecasts revenue based on product revenue, and you want to include this product revenue record as part of your forecasted revenue totals, or your forecasted quantities, or both, select the Forecast check box.

NOTE: If your company forecasts revenue, based on opportunities, rather than products, it is best not to select the Forecast check box on the Opportunity Product Revenue record.

- 6 Save the record.

To calculate opportunity revenue based on linked product revenue

- 1** Select the opportunity.
For instructions on selecting opportunities, see [Finding Records](#) (on page 41).
- 2** On the Opportunity Detail page, scroll to the Product Revenues section and do one of the following:
 - To link a product, click Add.
 - To update product information, click the Edit link next to the existing product. (If inline editing is enabled, you can edit the Product Revenues fields inline on the Opportunity Detail page; for more information about editing fields in related information sections, see [Updating Linked Records from Main Records](#) (on page 67).)
- 3** On the Opportunity Product Revenue Edit page, fill in the Quantity, Purchase Price, and Start/Close Date fields.
- 4** If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.
- 5** Save the record.
- 6** On the Opportunity Detail page, click Update Opportunity Totals in the Opportunity Product Revenue section.

This totals the product revenue for each linked product and displays it in the Revenue and Expected Revenue fields for the Opportunity.

To base your company's forecasts on product revenue records

- 1** Select the opportunity.
For information on selecting opportunities, see [Finding Records](#) (on page 41).
- 2** On the Opportunity Detail page, scroll to the Opportunity Product Revenues section, and do one of the following:
 - To link a product, click Add.
 - To update product information, click Edit. (If inline editing is enabled, you can edit the Opportunity Product Revenues fields inline on the Opportunity Detail page. For more information about editing fields in related information sections, see [Updating Linked Records from Main Records](#) (on page 67).)
- 3** On the Opportunity Product Revenue Edit page:
 - a** Fill in the Quantity, Purchase Price, and Start/Close Date fields.
 - b** Make sure that the date in the Start/Close Date field falls within the forecast period, and that the record is owned by a forecast participant.
 - c** Select the Forecast check box to indicate that you want this record information to contribute to your forecast revenue totals.

- d If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.

4 Save the record.

NOTE: If a product is not sold, you can update the associated Start/Close date and clear the Forecast check box on the Product Revenue page for that product to prevent the revenue for the product from being added to your company's forecasts. Alternatively, if one of several products linked to the opportunity is on hold, you can remove the product from the opportunity, and create another opportunity for that product to prevent its revenue from being included in the forecast.

Opportunity Product Revenue Fields

The following table describes field information for product revenue. Your administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

CAUTION: If your company bases its forecasts on products, the information that you enter for product revenue can affect its calculations.

Field	Description
Key Product Information	
Product Name	Only products marked Orderable by your company administrator can be selected. When you link a product to this opportunity, these fields are copied from the product definition: Product Category, Part #, Type, Status, and Description.
Quantity	Number of units the customer orders. For a recurring product, enter the quantity of the product per recurring period. For example, if you send 10 printer cartridges each month, enter 10 here.
Purchase Price	Product price.
Revenue	The quantity multiplied by the purchase price. The revenue cannot be overwritten. This field affects the forecasts for opportunity products.
Product Category	Category carried over with the product definition. Read-only.
Part #	Number carried over with the product definition. Read-only.
Type	Type carried over with the product definition. Read-only.
Status	Status carried over with the product definition. Read-only.
Description	Additional information about the product. Limit of 250 characters.
Recurring Revenue Information	

Field	Description
Start/Close Date	<p>This date is carried over from the close date on the opportunity. For the product revenue item, this date is the expected close date. For a recurring product, this date is the start date. For a recurring product with a close date that ends on the last day of the month and a start date of mid-month, add one record for the full recurring price and another record for the prorated order.</p> <p>For example: You start supplying paper to a company on May 15th. After that, you will be sending \$500 worth of paper at the end of each month through the end of the year.</p> <p>For the mid-month order, add a product record with these values: Revenue = \$250 Quantity = 1</p> <p>For the recurring order, add a second product record with these values: Revenue = \$500 Quantity = 1 Frequency = Monthly # of Periods = 7 (June through December).</p>
Frequency	<p>Frequency for a recurring product.</p> <p>The term <i>bi-weekly</i> means once every two weeks.</p> <p>When you populate this field, you must also populate the # of Periods field.</p>
# of Periods	<p>Number of periods for the recurring product revenue. Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency selected (in the Frequency field). For example, if you have weekly recurring revenue you can track revenue for up to five years.</p> <p>NOTE: When you populate this field, you must also populate the Frequency field.</p>
Sales Information	
Sales Stage	Read-only. Sales Stage carried over from the opportunity.
Probability	<p>Probability of a successful outcome for the product sale. The initial value in this field is carried over from the sales stage of the opportunity. You can change the value, if needed, to better reflect your particular product.</p> <p>When the sales stage changes, the value in the Probability field on the opportunity record again defaults to the value related to the new sales stage, but the value in the Probability field on the product is not overwritten.</p> <p>NOTE: If the Mass Update feature is used to change the sales stage on one or more opportunities, then the value in the Probability percentage field on the opportunities is not updated to the default probability percentage for the new sales stage.</p>
Expected Revenue	A currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field.
Account	Account linked to this opportunity. Read-only.

Field	Description
Owner	<p>Person assigned to this opportunity. This value defaults to the opportunity owner. Subsequent changes to the opportunity owner are not reflected in this field.</p> <p>Generally, the owner can update record details, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in forecasts, as well as in the reports that you or your managers run (from Reports and Dashboard pages).</p> <p>Each record has only one owner. However, opportunity records can be shared with other users through Opportunity Team or Account Team pages. For instructions, see Sharing Records (Teams) (on page 84).</p>
Forecast	Indicator to include this product in forecasting totals.

Analyzing the Pipeline

In the standard edition of Oracle CRM On Demand, the Pipeline Analysis for Current Quarter section of the Opportunity Homepage shows a quarterly analysis of the pipeline in chart format. You can use this analysis to help you to identify opportunities and challenges. In this section of the Opportunity Homepage, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view different opportunity and revenue analysis reports. For example, you can generate an analysis that shows the number of opportunities by region.

You can also do any of the following:

- Use this analysis to see where your deals are in the sales cycle, so you can take action when it is required.
- Filter by Average (Avg) Number (#) of Days in Stage to see if and where your deals are stalled.
- Filter by Number (#) of Opportunities to see how many opportunities are in each stage of your sales cycle.
- Display a list of the deals in each stage to help you focus on the areas that require your attention.
- Go to the Pipeline Dashboard to see historical and comparative perspectives about your overall performance.

Creating a Special Pricing Request from an Opportunity

You can create a special pricing request from an opportunity.

Note: This feature is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Before you begin. In the standard application, the opportunity special pricing request is not displayed. To add it to the Opportunity Detail page, your company administrator must grant read-only access to the related information for opportunities for your role. Then you must click the Edit Layout link on the Opportunity Detail page and add the special pricing request as a Related Information section (see [Changing Your Detail Page Layout](#) (on page 619)).

To create the special pricing request for an opportunity

- 1** Select the opportunity.
For information on selecting opportunities, see [Finding Records](#) (on page 41).
- 2** On the Opportunity Detail page, scroll down to the Special Pricing Request related information, and click New.
- 3** In the Special Pricing Product Detail page, enter the required information, and save the record.
For information on the fields, see [Special Pricing Product Fields](#) (on page 372).

Specifying Parent and Child Opportunities

You can indicate opportunity hierarchies, such as a sales opportunity that has multiple components, by specifying a parent-child relationship. You can create the parent opportunity from the child opportunity or create the child opportunity from the parent opportunity.

If you delete a parent opportunity that has related subopportunities, the association between the parent and child records is deleted, but the child opportunities remain as active records. The Parent Opportunity External Unique ID field remains populated for the child opportunity record in case the parent opportunity is later restored from the Deleted Items page.

If you associate a child opportunity with a new parent opportunity record, the Parent Opportunity ID, Parent Opportunity, and Parent Opportunity External Unique ID fields are populated with the values for the new parent. If the original parent record is restored, it is not reassociated with the child record.

If a single child opportunity is deleted, the parent opportunity and any additional child opportunities remain as active records, and the deleted child opportunity moves to the Deleted Items page. The deleted child opportunity is no longer displayed in the Sub-Opportunities related information list for the parent opportunity, but the Parent Opportunity Id, Parent Opportunity, and Parent Opportunity External Unique ID field values remain populated on the deleted child opportunity record.

The following procedures describe how to specify parent and child opportunities:

To specify a parent opportunity

- 1** Select an opportunity to be the child opportunity.
For instructions on selecting opportunities, see [Finding Records](#) (on page 41).
- 2** On the Opportunity Detail page, click Edit.
- 3** On the Opportunity Edit page, click the Lookup icon next to the Parent Opportunity field.
- 4** In the Lookup window, select or create the parent opportunity.
- 5** Save the record.

To specify a child opportunity

- 1 Select an opportunity to be the parent opportunity.
For instructions on selecting opportunities, see [Finding Records](#) (on page 41).
- 2 On the Opportunity Detail page, click Edit.
- 3 On the Opportunity Edit page, click the New button next to the Sub-Opportunities Related Items list.
- 4 In the Lookup window, select or create the child opportunity.
- 5 Save the record.

To remove or delete an opportunity hierarchy

- 1 Select the child opportunity.
For instructions on selecting opportunities, see [Finding Records](#) (on page 41).
- 2 On the Opportunity Detail page, click Edit.
- 3 In the Parent Opportunity field, delete the current value, type a new value, or use the Lookup icon to choose a new value.
- 4 Save the record.

Related Topics

See the following topics for related information:

- [Finding Records](#) (on page 41)
- [Opportunity Fields](#) (on page 226)

Creating a Deal Registration from an Opportunity

You can create a deal registration from an opportunity.

Note: This feature is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Before you begin. In the standard edition of Oracle CRM On Demand, the Deal Registrations section is not displayed on the Opportunity Detail page. To add it to the Opportunity Detail page, your company administrator must grant read-only access to the related information for opportunities for your role. Then you must click the Edit Layout link on the Opportunity Detail page, and add the deal registration as a Related Information section (see [Changing Your Detail Page Layout](#) (on page 619)).

To create a deal registration from an opportunity

- 1 Select the opportunity.

For information on selecting opportunities, see [Finding Records](#) (on page 41).

- 2 On the Opportunity Detail page, scroll down to the Deal Registrations related information, and click New.

- 3 In the Deal Registration Edit page, enter the required information.

For information on the fields, see [Deal Registration Fields](#) (on page 348). For information on associating existing deal registrations with existing opportunities and to change existing associations between the two, see [Associating Deal Registrations with Opportunities](#) (on page 345).

Splitting Opportunity Revenue Among Team Members

You can split revenue from an opportunity among opportunity team members. The Opportunity Revenue forecast type uses these revenue splits to calculate the revenue noted in the opportunity record. For more information on forecasting, see [Forecasts](#) (on page 228) and [About Opportunities and Forecasts](#) (on page 210). For more information on opportunity teams, see [About Opportunity Teams](#) (on page 225).

To split opportunity revenue among team members

- 1 Select the opportunity.

For information on selecting opportunities, see [Finding Records](#) (on page 41).

- 2 On the Opportunity Detail page, scroll down to the Opportunity Team section, and do one of the following:

- To add a team member, click Add Users.
- To update team member information, click Edit Users.

- 3 On the Opportunity Team Edit Users page:

- a For each team member, enter information in the required fields, including the Split Percentage (%) field.
- b (Optional) Click the Spread Split button to distribute the split percentage evenly among team members.
- c (Optional) Click the Refresh Totals button to recalculate the Split Revenue and Totals.

NOTE: The Refresh Totals and Spread Split buttons are not visible unless Enable Opportunity Revenue Split is selected in your company profile, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).

- 4 Save the record.

Opportunity Team Fields

The following table describes some of the fields for opportunity teams.

Field	Comments
Split %	This field shows each team member's percentage of revenue. The default value is 100% for the opportunity owner and 0% for other team members.
Split Revenue	This is a calculated, read-only field. The split revenue is calculated by multiplying the opportunity revenue by the split percentage (%).
User Role	Select an option that defines the relationship between the team member and the opportunity team. This is a required field.
Opportunity Access	Designates a team member's access to the opportunity record. This is a required field.

About Opportunity Teams

For some record types, such as accounts, contacts, and opportunities, you can allow a team of users to share a record. To allow a user to share a record, you first add the user to the team for the selected record. Then you specify the access level the user has to the record, and to specified linked records.

Note the following points regarding opportunity teams, account teams, and access to opportunity records:

- If you check the Enable Parent Team Inheritance check box on the Company Profile page, account team members are added to an opportunity team automatically when the opportunity is linked to the account. (Similarly, account team members can automatically become members of a contact team when the contact is linked to an account.)
- If you do not want a user to be added to the opportunity team automatically when the opportunity record is linked to an account, make sure that the Enable Parent Team Inheritance check box on the Company Profile page is not selected. This option prevents the account team member from being added to the opportunity team automatically.

You can add users to opportunity teams in the following ways:

- By clicking the Add Users button on the Record Detail page.
- By using Assignment Manager. For more information, see [About Assignment Rules](#) (on page 1253).
- By using groups. For more information, see [Group Management](#) (on page 1204).

To ensure that a user does not have access to opportunities linked to an account, you must ensure that the user is not given access through one or more of the following methods:

- The user is not on the opportunity team.

- The user does not have a subordinate who is on the opportunity team.
- The user has not been delegated by another user who has access to opportunities.
- The opportunity is not in a book where the user is a member, or in any of its subbooks.
- The user does not have access to the opportunity records from the role settings.
- The access level of the record type for the account related opportunity is set to any option except the following: No Access or Inherit Primary.

Opportunity Fields

Use the Opportunity Edit page to add an opportunity or update details for an existing opportunity. The Opportunity Edit page shows the complete set of fields for an opportunity.

TIP: You can also edit opportunity information on the Opportunity List page and the Opportunity Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

CAUTION: Information you enter for opportunities can affect the revenue forecasts for your company.

The following table provides additional information regarding some fields.

Field	Description
Key Opportunity Information	
Opportunity Name	Name for this opportunity.
Account	Account linked to this opportunity.
Parent Opportunity	The parent opportunity that is linked to this opportunity.
Sales Stage	<p>Stages in the sales process, such as Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won, or Closed/Lost.</p> <p>NOTE: When the sales stage changes, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage, unless you use the Mass Update feature to change the sales stage. If you use the Mass Update feature to change the value in the Sales Stage field on one or more records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage.</p>
Next Step	Next action that needs to be accomplished for this opportunity.
Revenue	<p>The amount of revenue for the opportunity. The default value is zero. This value affects the forecasts for opportunity revenue.</p> <p>NOTE: Any default or post default values that are specified for this field are</p>

Field	Description
	ignored.
Close Date	The expected date for the opportunity to close. By default, the close date is set to the same date as the Created Date field. If the opportunity closes on a different date, you must modify the Close Date field, because the close date is used in generating forecasts.
Forecast	If this check box is selected, it indicates that the opportunity is to be included in the forecast revenue calculation.
Sales Detail Information	
Status	Status of this opportunity, such as Pending, Lost, or Won.
Priority	Priority level for this opportunity, such as High, Medium, and Low.
Lead Source	Category of the primary source, such as Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Partner, Referral - Employee, Referral - External, Web Site, or Other.
Source Campaign	The campaign that generated the opportunity. If the opportunity is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the opportunity is created by a user, the user can enter the information in this field.
Probability %	<p>A percentage that reflects the confidence you have that the deal will close with the specified revenue on the specified close date. The Probability percentage field is based on the default probability value for the selected sales stage.</p> <p>You can change the value in the Probability percentage field, if needed, to better reflect your particular opportunity while it is in that sales stage. However, when you select a new sales stage on the opportunity, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage.</p> <p>NOTE: If you use the Mass Update feature to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage. If you want the probability percentage on the opportunities to change when the sales stage is updated, you must update the sales stage on each record individually, or through Web services.</p>
Expected Revenue	A currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field. A lower percentage in the Probability field reduces the expected value that is included in your revenue forecast.
Reason Won/Lost	Reason for opportunity being won or lost, such as Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision, or Other.

Field	Description
Additional Information	
Owner	<p>Person assigned to this opportunity. Generally, the owner can update record details, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p> <p>Each record has only one owner. However, opportunity records can be shared with other users through Opportunity Team or Account Team pages. For instructions, see Sharing Records (Teams) (on page 84).</p>
Reassign Opportunity	<p>Indicates that the opportunity should be reassigned. If your company administrator has set up opportunity assignment rules, selecting this field triggers assignment manager to process the opportunity again and assign it according to the rules.</p> <p>NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and the current system load. In the case of opportunities, the processing time is also affected by the number of opportunity team members, and the number of accounts and contacts associated with the record. The owner name changes when the record is reassigned.</p>
Description	<p>Additional information about the opportunity. For example, include the product interest (500 parts) and the account (Acme Corp.) in the opportunity description. This field has a limit of 16,350 characters.</p>

Forecasts

Use the Forecast pages to review, adjust, and submit forecasts. A *forecast* is a saved snapshot of expected revenues over time. Oracle CRM On Demand calculates forecasts for each quarter and breaks down that information by fiscal month.

Forecasts in Oracle CRM On Demand automate a process that is often manual and sometimes inaccurate. Forecasts help companies to develop sales strategies. They also help companies to identify future business needs by giving managers accurate and up-to-date information about expected sales and quarterly progress toward sales targets. Individual sales representatives do not have to compile statistics. Instead, they decide when to include a record in their forecasts. The remainder of the process is automatic.

Your company can base its forecasts on any of the following:

- Opportunity revenue
- Opportunity product revenue and quantities linked to opportunities
- Account revenue
- Contact revenue

The forecast snapshots save the forecasted opportunity, product, or revenue information and the adjusted forecast totals, so that you and your managers can review and evaluate forecast trends. In addition, you can view saved forecasts to examine the history of opportunities on which the team is currently working.

Your company can set up forecasts to run on a weekly or monthly basis. At the start of the specified day (that is, at 1 minute past midnight in the time zone of the hosting facility), Oracle CRM On Demand automatically generates the forecast and displays an alert on My Homepage. After receiving this alert, you can review the forecast to analyze the newly calculated pipeline, forecast, and closed revenue against quota information.

An hour before the next scheduled forecast generation, the current forecast is automatically archived, preventing anyone from editing it.

Working with the Forecast Homepage

The Forecast Homepage is the starting point for managing forecasts. This page lists forecast summary information relevant to you.

You can limit the records listed on the Forecast Homepage using two different methods:

- Locate specific forecasts by clicking a column heading to sort the records based on that column, and then clicking a letter in the Alpha bar to show only the records that begin with that letter. You can also type characters in the text field, and click Go to find the records beginning with those characters. Click the All link to show the entire list of forecasts.
- Number of records displayed. Adjust the value in this field to show a greater or lesser number of records in the summary list.

The Forecast Homepage lists your forecasts according to the date on which they were created, with the most recent forecasts listed first. It also gives a summary of important information:

- Status is the current state of the forecast. Successfully completed forecasts will have a status of Active. A forecast with a status of Submitted indicates the forecast is ready for management review.
- Pipeline revenue is the combined revenue from all your records, regardless of the setting of the Forecast check box or sales stage on the individual records. Pipeline revenue is not applicable to account or contact revenue forecasts.
- Forecast revenue equals the total revenue for all records that have the Forecast check box selected.
- Closed revenue equals the total revenue for all opportunities or product revenue with a sales stage value of Closed-Won. For account and contact revenues, the status field value of Closed includes the record in the calculation of the closed revenue. Closed revenue is recognized for the revenue amount that pertains to the forecast period, which is based on the starting closing dates for the record.

Managing Forecasts

To manage forecasts, do the following tasks:

- [Reviewing Forecasts](#) (on page 230)
- [Refreshing Forecasts](#) (on page 232)
- [Viewing and Editing a Forecast Using a Different Currency](#) (on page 233)
- [Viewing Forecast History](#) (on page 234)
- [Submitting Forecasts](#) (on page 234)
- [Unsubmitting Forecasts](#) (on page 235)
- [Managing Quotas](#) (on page 235)
- [Managing Your Team's Forecasts](#) (on page 237)

NOTE: Forecasting relies on user roles and reporting hierarchies. To create forecasts successfully, all users who have a user role that is designated as a forecast role must have a status of Active on their user record, unless designated by your company administrator, and must have a manager specified in their user record. The manager is specified in either the Reports To field or the Reports To (Alias) field, whichever is present on the user page layout.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- [Forecast Fields](#) (on page 239)
- [Working with the Forecast Homepage](#) (on page 229)
- [Setting Up Users](#) (on page 1109)
- [Setting Up Users' Sales Quotas](#) (on page 1121)
- [Reports](#) (on page 675)

Reviewing Forecasts

Forecasts are generated automatically either weekly or monthly, according to your company's business process. Each time a new forecast is generated you receive an alert on My Homepage. After you receive the notification, review your forecast. When reviewing your forecast, the forecast summary months align with your company's fiscal calendar definition. If you are using a fiscal calendar such as 4-4-5, 5-4-4, or custom

fiscal calendars, your company's forecast periods may not necessarily correspond to a Gregorian calendar. Therefore, if an Opportunity falls in the calendar month of June, it does not mean that it will be forecasted as part of the fiscal month of June. For more information about custom fiscal calendars, see [About Fiscal Calendars](#) (on page 1012).

NOTE: When using custom fiscal calendars, the forecast periods are based on the fiscal years and months defined by your company administrator.

To review forecasts

- 1 Click the Forecasts tab.

The Forecast Homepage shows forecast summary information that includes Status, Pipeline, and Closed Revenue. You can sort the forecast summary by status, forecast date, or owner (managers only). Pipeline is not applicable to account or contact revenue forecasts.

- 2 In the Forecast Homepage section, click the Forecast Date link for the forecast you want to review.

- 3 On the Forecast Detail page, review the information in the following sections:

- **Forecast Summary.** This section summarizes forecasts by fiscal quarter and month. The Forecast Summary list provides information on Quota, Closed Revenue, Quota %, Forecast amount, Best Case, Pipeline, and Expected Revenue. You can sort the summary list by month.

Team's Summary by Month. This section shows a list of forecasts for each team member. If you are a manager, you will see the forecast Month, Quota %, Forecast amount, Closed Revenue, Best Case, Pipeline and Last Updated date by Owner Alias (team member). If you drill down on a specific team member's row within the Team's Summary, the corresponding forecast detail page for the selected user appears. On this page you see the team member's individual forecast summary and forecasted revenue in the My Opportunities, My Revenues, or My Products section.

NOTE: For Account and Contact Revenue forecast types the summary sections do not include Pipeline, Best Case, or Expected Revenue.

- **Team's Product Summary.** (Opportunity Product forecast type only) This section shows a list of forecasted products for each team member. If you are a manager, you will see the Closed Quantity, Forecasted Quantity, Pipeline Quantity, Closed Revenue and Expected Revenue by Owner Alias (team member) and product. If you drill into a specific team member's row within the Team's Product Summary, the corresponding forecast detail page for the selected user appears. Here you will see their individual Forecast Summary and forecasted quantities by Product in the My Products section.

NOTE: The Forecast Detail page shows only five of your team's records. To view the entire list of records, click Show Full List under the Team's Summary by Month section.

- **My Opportunities.** If you are using the Opportunity Revenue forecast type, this section appears as part of your forecast detail. This section lists current opportunities, and indicates whether the opportunity is forecasted. It also shows the Close Date, Account Name, Revenue amount, current Sales Stage, and Next Step, if specified, for each opportunity.
- **My Revenues.** If you are using the Opportunity Product, Account or Contact Revenue forecast type, this section appears as part of your forecast detail. This section lists current revenues, and indicates whether the revenue record has been forecasted by the owner (forecast flag selected). It also shows the Start and Close date, Product name, Revenue amount, and Account Name for each revenue record that you enter.

Additional columns might be displayed in the My Revenues section, depending on the revenue type being forecasted.

For opportunity product revenue forecasts, the following columns are displayed:

- Opportunity Name
- Sales Stage

For account and contact revenue forecasts, the following columns are displayed:

- Product Category
- Status
- Contact Name

- **My Products.** If you are using the Opportunity Product forecast type, this section appears as part of your forecast detail. A row for each product forecasted is listed along with the corresponding product category, closed quantity, forecasted quantity, pipeline quantity, closed revenue, and expected revenue. These values are the sum of all forecasted opportunities for the selected user forecast. To see the forecasted opportunities associated with a specific product, click the product name.

NOTE: If you are using the Opportunity Product forecast type, you can also view all forecasted opportunities within a specific product category by clicking the Product Category field.

You can verify the forecast type that was used in a forecast and that was based on the Type field in the Forecast information section.

Viewing and Editing Forecasts Using a Different Currency

The View In currency conversion feature allows you to specify in which currency you want to display your forecast. For more information on viewing and editing forecasts in different currencies, see [Viewing and Editing a Forecast Using a Different Currency](#) (on page 233).

Refreshing Forecasts

Forecasts are snapshots of revenue data for specific periods. If an opportunity or revenue record is updated, you can refresh some values for your current, unsubmitted forecast to ensure that the forecast reflects the most up-to-date information. You can then adjust those records in the Forecast Summary section to more accurately reflect the revenue that will be generated.

Updating the record values that contribute to the forecast amounts, and then recalculating the forecast totals, allows for more consistent forecasting. Updates to the Revenue, Close Date, Sales Stage, Probability, Forecast, Quantity, or Status fields can affect your forecast.

To update record values and refresh forecast amounts

- 1 Click the Forecasts tab.

The Forecast Homepage lists your forecasts according to the date on which they were created, with the most-recent forecasts listed first.

- 2 In the Forecast Homepage Section, click the Forecast Date link for the forecast that you want to update.

- 3 In the My Opportunities, My Revenues, or My Products section on the Forecast Detail page, click the Opportunity Name, Start/Close Date, or Product link for the record that you want to modify.
- 4 On the Detail page, click Edit.
- 5 On the Edit page, update the appropriate values for the opportunity or revenue record, and click Save.
- 6 Navigate back to the Forecast Detail page, and then click the Refresh link in the record row.
- 7 On the Forecast Detail page, click Rollup.

The forecast summary totals are updated based on the opportunity or revenue records that you modified.

NOTE: To capture any updates made to the opportunity or revenue records in the forecast summary, click Rollup.

When you click Rollup, any prior adjustments to the forecast summary totals are overwritten with the new values brought in from the opportunity or revenue records; therefore after updating your records, you might still want to adjust your forecast summary to reflect your sales expectations more accurately.

Adjusting Forecast Totals

Sales representatives and managers can make high-level adjustments by month to their current, forecasted revenue to make sure that the automatically generated forecast reflects values based on professional judgement. You can adjust the following forecast summary fields:

- Forecast
- Best Case

NOTE: Only the forecast owner can adjust forecast totals.

To adjust forecast totals

- 1 Click the Forecasts tab.
- 2 In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to adjust.
- 3 In the Forecast Summary section, click Edit.
- 4 On the Forecast Edit page, type your adjusted revenue values in the Forecast or Best Case fields.
- 5 Click Refresh Totals to verify your adjusted values, and then click Save.

NOTE: Best case revenue is not applicable to account or contact revenue forecasts.

Viewing and Editing a Forecast Using a Different Currency

The view-in currency conversion feature allows you to specify in which currency your forecast should be displayed. By default, the forecast will be displayed in your native currency (the default currency selected on

your user profile or your company's default currency). You can also edit forecasts in the selected currency if you are managing opportunities in multiple economic zones.

If the forecast is edited while being viewed in euro (EUR), then the user can enter forecast values in euro. When the edited forecast is saved, it is converted to and saved in your company's default currency.

To view a forecast using a different currency

- 1 Click the Forecasts tab.
- 2 From the Forecast Homepage, click the Forecast Date link for the forecast that you want to review.
- 3 On the Forecast Detail page, select the currency from the View In list in the Forecast Summary title bar.

The view-in currency value displays your user profile currency by default. If your user profile currency is not defined, the View In selector displays your company's currency by default. All of your company's active currencies are available for selection.

When you select a view-in currency, the forecast values are converted from the stored forecast currency (company currency) to the selected view-in currency, using the valid exchange rates for the forecast date.

If you drill down on a forecast record, or select a view-in currency that does not have a valid exchange rate defined for the forecast date, the forecast is displayed in your company's default currency instead, and an advisory message is displayed.

Viewing Forecast History

You can view a history of forecasts to determine trends over time.

To view your forecast history

- 1 Click the Forecast tab.
- 2 In the Forecast Homepage section, click the column heading in which you want to sort the records.
- 3 Review the trends over time for forecast, pipeline, and closed revenue.

Submitting Forecasts

The last step in creating a forecast is to submit it to your manager for review. When the forecast reflects the amounts that you want to include in your company's forecasts, submit the forecast.

NOTE: Managers can submit forecasts for their direct reports. This option must be selected when you set up your forecast definition. If this option is not selected, managers cannot submit their forecasts until all of the managers' direct reports submit their forecasts.

Submitted forecasts cannot be edited. If you need to adjust a submitted forecast, your manager or administrator must first unlock (unsubmit) the record. For more information, see [Unsubmitting Forecasts](#) (on page 235).

To submit your forecast

- 1 Click the Forecasts tab.
- 2 In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to submit.
- 3 On the Forecast Detail page, click Submit Forecast in the Forecast Summary title bar.

Related Topics

See the following topic for related information:

- [Unsubmitting Forecasts](#) (on page 235)
- [Setting Up the Forecast Definition](#) (on page 1267)

Unsubmitting Forecasts

For a forecast owner to update a submitted forecast, a manager or administrator must first unlock (unsubmit) the record.

To unsubmit a forecast

- 1 Click the Forecasts tab.
- 2 In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to unlock.
- 3 On the Forecast Detail page, click Unsubmit Forecast.

This action unlocks the forecast, allowing direct reports to update and adjust their forecasts, and then resubmit the forecasts.

NOTE: Clicking Unsubmit Forecast sets the forecast status to Active.

Related Topics

See the following topics for related information:

- [Submitting Forecasts](#) (on page 234)
- [Setting Up the Forecast Definition](#) (on page 1267)

Managing Quotas

If your company administrator is not responsible for setting your quotas, you can create and update quotas for periods throughout the year using the Edit Quota page. This allows you to compare and adjust your quotas against forecasts. You also can review your quota target history for every period, in each year.

After a quota is created, the monthly quota values are automatically reflected in the forecast after the forecast is generated. All active quotas are added together for the month and the totals are displayed in the forecast.

If you do not want a quota to be included in your forecast, set the Status field to Inactive until you are ready to track the quota.

To manage your quota

- 1** From any page, click the My Setup link in the top right corner.
- 2** From the Personal Homepage, click the Personal Profile link in the Personal Profile section.
- 3** From the Personal Profile page, click the My Profile link in the Personal Information section.
My Profile allows you to define quotas and sharing groups, as well as change your currency, language, and time zone.
- 4** On the Personal Detail page, scroll down to the Quotas section, and then click New Quota.
Existing quotas appear in the Quotas list, and can be sorted by year, name and status. If you want to modify a listed quota, select Edit in the record-level menu for the quota record you want to edit. To remove a quota from the list, select Delete in the record-level menu for the quota record you want to delete.
- 5** On the Edit Quota page, complete the required fields for the new quota:
 - a** Select the calendar year in which the quota will begin.
NOTE: The year that you select on this page is the calendar year, not the fiscal year. The fiscal year can be different from the calendar year. For example, your company's fiscal year might begin on 01 April and end on 31 March (in the following calendar year).
 - b** Make sure the Status is Active.
 - c** Enter a name for the quota.
- 6** Enter quota information for each month. (The monthly quota fields start with the first month of your company's fiscal year.)
- 7** Save the quota.

To spread a total quota amount evenly across months of the year

- 1** On the Personal Detail page, scroll down to the Quotas section, and then click New Quota.
- 2** On the Edit Quota page, enter the required information, making sure the quota Status is Active.
- 3** In one of the month fields, enter the total quota amount for the year, and then click Sum.
The amount appears in the Total Quota field.
- 4** Click Spread.
The total amount is spread equally across the 12 months of the year, and the apportioned amount appears in the fields associated with each month.

5 Save the quota.

The quota appears in the Quotas list.

Managing Your Team's Forecasts

If you are a manager, you can:

- Review and adjust forecasts for your team
- View all opportunities owned by your team
- Unsubmit a forecast so that a team member can adjust it

Your team consists of all employees associated to roles that report to you. This role hierarchy is set up in User Administration. For more information, see [Setting Up Users](#) (on page 1109).

To review forecasts and opportunities for your team

- 1 Click the Forecasts tab.
- 2 In the Forecast Homepage section, click the Forecast Date link in the forecast record.
The Forecast Detail page shows a summary of your team's totals, the totals for each team member by month, and the date the forecast was last updated.
- 3 On the Forecast Detail page, click the Owner Alias link of the team member whose forecast you want to view.

TIP: If you want to display the forecast summaries of all your team members, click the Show Full List link.

The team member's Forecast Detail page appears. From this page, you can review the team member's forecast totals and all of the individual's forecasted opportunities, but since the details are read-only, you cannot edit them.

Forecast Detail Page

The Forecast Detail page displays forecast information for the selected forecast participant. This page shows the forecast summary, which lists projected revenue amounts by fiscal month, the corresponding user quota and percent attainment, as well as a list of the individual's forecasted opportunities, revenues or products.

Managers can also see their team's summary by month. As a result, managers can see their own detailed forecasted records and the summary records of their direct subordinates for the forecasted period.

Fiscal months are indicated by their standard names in the Forecast Summary and Team's Summary sections. However, the duration of the month is based on your company's definition of the fiscal calendar . For example, the month of October might start on 15 October and end on 14 November.

The following table describes the tasks that you can do from the Forecast Details page.

To do this	Follow these steps
------------	--------------------

To do this	Follow these steps
Change the currency for a displayed forecast	In the Forecast Summary title bar, click View In and select the currency.
Show all of your team's forecast summaries	<p>Click Show Full List under the Team's Summary by Month section. This section is available only if you are a manager-level user.</p> <p>In this section, a line item is listed for each team member by fiscal month.</p>
Show all of your team's product summaries	<p>Click the Show Full List link under the Team's Product Summary section. This section is only available if you are a Manager level user and you are using the Product Quantity Forecast type.</p> <p>In this section, a line item is listed for each team member by product.</p>
Show the forecast detail for a specific user	In the Owner Alias column of a team's summary section, click the name of the user for whom you want to see forecast details.
Show all forecasted opportunity records for a specific user	<p>Click Show Full List under the My Opportunities section. This section is available only if you are using the Opportunity Forecast type.</p> <p>This page lists a row for each revenue record forecasted along with the corresponding close date, forecast flag, opportunity name, account name, revenue, sales stage, and next step.</p>
Show all forecasted revenue records for a specific user	<p>Click the Show Full List link under the My Revenues section. This section is available only if you are using the Product Revenue, Account Revenue or Contact Revenue Forecast type.</p> <p>This page lists a row for each revenue record forecasted along with the corresponding start and close date, forecast flag, product name, opportunity name, account name, revenue, and sales stage.</p>
Show all forecasted product records for a specific user	<p>Click Show Full List under the My Products section. This section is available only if you are using the Product Quantity Forecast type.</p> <p>This page lists a row for each product forecasted along with the corresponding closed quantity, forecasted quantity, pipeline quantity, closed revenue and expected revenue. These values are the sum of all forecasted opportunities for the user.</p>
Show all forecasted opportunities within a product category for a specific user	In the Product Category column, click the category for which you want to see the forecasted products. This page shows the specific values for each of the related opportunities for the selected product category, including the close date, opportunity name, individual quantities, and revenue amounts.
Show all forecasted opportunities for an individual product for a specific user	<p>In the Product Name column, click the product for which you want to see forecasted opportunities.</p> <p>This page shows the specific values for each of the related opportunities for the selected product, including the close date, opportunity name, individual quantities, and revenue amounts.</p>
Update a forecasted	In the My Opportunities, My Revenues or My Product Revenues section within the Forecast Detail, click Opportunity Name to navigate

To do this	Follow these steps
opportunity	<p>to the opportunity details.</p> <p>When you save your changes, return to the forecast by clicking Back to Forecast Detail, and then click Refresh.</p> <p>Any adjustments made to the opportunity detail records are not captured in the forecast summary section until you click Rollup.</p>
Rollup forecasted revenue	<p>In the Forecast Summary section, click Rollup.</p> <p>Clicking Rollup updates (recalculates) the total fields based on your opportunity updates.</p> <p>Any adjustments made to the forecast revenue amounts will be overwritten after clicking Rollup.</p>
Update the forecast or best case revenue amounts	<p>In the Forecast Summary title bar, click Edit.</p> <p>Clicking Edit opens the Forecast Edit page. Enter revenue adjustments, and click Save.</p>
Submit a forecast	<p>In the Forecast Summary section, click Submit Forecast.</p> <p>The Status to Submitted field is updated, indicating to a manager that the forecast is ready for review.</p>
Unsubmit a forecast	<p>In the Forecast Summary section, click Unsubmit Forecast.</p> <p>The forecast is unlocked. The status is set to Active, allowing a user to update and adjust his or her forecast, and then resubmit it. Only the reporting manager or company administrator can perform this action.</p>

Forecast Fields

The forecast revenue related fields (quota, closed revenue, quota %, forecast, pipeline, and expected revenue) are calculated. See the following table for more information about the fields.

Field	Description
Best Case	<p>(Optional) This field represents a best-case estimate of the revenue that will be produced by all opportunity or product revenue.</p> <p>This field is not applicable to account or contact revenue forecasts.</p>
Closed Revenue	<p>Read-only. This field is calculated. If your company bases its forecasts on opportunities, then the closed revenue is the total of all eligible opportunities with a sales stage of Closed-Won.</p> <p>If your company bases its forecasts on products, then the closed revenue is the total of all eligible product revenue records during that period, with the sales stage of Closed-Won.</p>

Field	Description
	If your company bases its forecasts on account or contact revenues, then the closed revenue is the total of all eligible revenue records with a status of Closed.
Expected Revenue	<p>Read-only. This field is a weighted average. The value is calculated based on the Potential Revenue field multiplied by the value in the Opportunity Probability field.</p> <p>This field is not applicable to account or contact revenue forecasts.</p>
Forecast	<p>The value in this field is calculated when the forecast is generated. However, you can adjust the value in this field manually to make sure that the forecast reflects values based on your professional judgment.</p> <p>If the Forecast check box is selected in the Opportunity record, the forecast is the total of all opportunities during the forecast period. If the Forecast check box is selected in the Revenue record, the forecast is the total of all revenue records during the forecast period.</p>
Owner	Indicates the person who owns or is responsible for this forecast. Oracle CRM On Demand generates this information.
Last Updated	The date when the team member's forecast record was last updated. The forecast date is displayed by default. If a user performs an edit, rollup, submit, or unsubmit for a forecast, this field shows the date the record was changed. Oracle CRM On Demand generates this information.
Pipeline	<p>Read-only. This field is calculated. The pipeline is the total of all opportunity or product revenue records for the forecast period, regardless of the setting of the Forecast check box or sales stage on the individual records.</p> <p>This field is not applicable to account or contact revenue forecasts.</p>
Quota	Read-only. The sales revenue target for the forecast period. The quota can be set up by the individual user or the administrator. Only active quotas are used when creating forecasts.
Quota %	This field is calculated. The quota percent is the closed revenue value divided by the quota value.
Status	<p>Oracle CRM On Demand generates the forecast status. The forecast status can be one of the following:</p> <ul style="list-style-type: none"> ■ Active. Oracle CRM On Demand sets this status when forecast generation is complete. ■ Submitted. Oracle CRM On Demand sets this status when you click Submit Forecast. The record is locked unless your manager or a company administrator unlocks (unsubmits) it. ■ In Progress. Oracle CRM On Demand sets this status while the forecast is being generated.

Field	Description
	<ul style="list-style-type: none">■ Incomplete. Oracle CRM On Demand sets this status if there is an error while reading, associating, or rolling up revenue. An incomplete forecast can sometimes occur due to a user error, such as a hierarchy issue, or other data-related problems.■ Pending. Oracle CRM On Demand sets this status if an issue occurs while processing your company's forecast. If your company administrator did not receive an email notification describing the forecast issue, contact Customer Care.

5 Business Planning

This topic introduces the Business Planning features available with Oracle CRM On Demand.

About Business Planning

Oracle CRM On Demand supports the management of accounts and contacts. This management includes handling the profiles of the account and related contacts, the account and contact relationships, and creating an overall plan for how to effectively allocate funding and resources associated with an account.

As sales and marketing teams move from a product-centered strategy to an account-based (or customer-based) sales strategy, key account selling and strategic business planning become critical for success. Sales and marketing teams define the following:

- Potential opportunities for the business
- Strategic goals
- Lists of defined activities to meet these goals and win opportunities
- Strategic goals for an entire account
- Tangible goals with the appropriate definition of the potential opportunity

Oracle CRM On Demand supports selling strategies and processes to manage your key accounts that enable your account teams to create and manage the following:

- Business and engagement plans
- Related objectives
- Opportunities
- Activities

NOTE: The Business Plan, Objective, Plan Account, Plan Contact, and Plan Opportunity functionality was developed in the context of Oracle CRM On Demand Life Sciences Edition, however, all Oracle CRM On Demand customers can access and use this functionality. Your company administrator can enable this functionality for your use.

Scenarios for Business Planning

The following topics provide examples of how Oracle CRM On Demand business planning functionality might be used. You might use this functionality differently, depending on your business model.

- [Scenario for Managing Plans for a Single Account](#) (on page 244) (Account Centric)
- [Scenario for Managing Plans for a Group of Accounts or Territories](#) (on page 245) (Account Centric)

- [Scenario for Managing Plans for Contacts](#) (on page 245) (Contact Centric)
- [Scenario for Managing Plans for Objectives and Products](#) (on page 246) (Product Centric)

Scenario for Managing Plans for a Single Account

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use the Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing plans for single accounts. The account manager uses sophisticated functions to manage large and complex accounts (for example, a multinational company) compared with a simple account (such as a home-based business). Such an account has multiple plans for different periods or even within the same period for different account managers. For example, a general account manager or a special products account manager might have different plans.

The account manager performs the following tasks to manage the plans for an account:

- 1 Before the planning period, the account manager creates a business plan for each account. The plan establishes the high-level quantitative and qualitative goals for the account for the associated period. An annual plan and child quarterly plans are usually available, particularly for important accounts. The key metric for the business plan is revenue. Typically, a plan for a large customer contains child plans for different operating units and territories, and so on, but all plans are managed as one account. For information on how to set up a business plan, see [Business Plans](#) (on page 247).
- 2 In the approval process for the business plan, the account manager changes the status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.
- 3 The account manager completes additional details of the business plan; that is, the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective might be to conduct a certain number of sales calls. The account manager can associate specific activities and opportunities with either a business plan or an objective. For information on how to set up an objective, see [Objectives](#) (on page 253).
- 4 As sales opportunities arise, the account manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see [Opportunities](#) (on page 210).

While performing the planning activities, the account manager can do the following:

- View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts
- View any objectives that apply to all accounts
- Review existing activities continuously, and create follow-up activities and opportunities

Scenario for Managing Plans for a Group of Accounts or Territories

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, which is a variation of [Scenario for Managing Plans for a Single Account](#) (on page 244), an account manager or sales manager performs the business planning for groups of accounts. Examples of these groups of accounts include an account manager's entire territory, a *brick* (a collection of accounts and contacts, normally in a common geographic area), a larger region, a market channel or segment, or a group of small accounts that do not warrant individual plans. Typically, the users performing the [Scenario for Managing Plans for a Single Account](#) (on page 244) also perform this scenario.

The account manager or sales manager performs the following tasks to manage plans for the group of accounts or territory:

- 1 Before the planning period, the account manager creates a business plan for each account. The plan establishes the high-level quantitative and qualitative goals for the account for the associated period. Typically, an annual plan and child quarterly plans are available, particularly for important accounts. The key metric for the business plan is revenue. Typically, there are always quarterly child plans and perhaps monthly child plans for lower-level planning. Certain fields, such as Contacts, might be left empty. Plans might exist at multiple levels of the hierarchy, such as territory, region, country, which can be created by recursive relationships in the Business Plan record type. The account manager creates the highest-level plan first, so that other personnel can create child plans below the parent in the hierarchy. For information on how to set up a business plan, see [Business Plans](#) (on page 247).
- 2 In the approval process for the business plan, the account manager changes status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.
- 3 The account manager completes the details of the business plan, namely the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective might be to conduct a certain number of sales calls. The account manager can associate specific activities and opportunities with either a business plan or an objective. For information on how to set up an objective, see [Objectives](#) (on page 253).

While performing the planning activities, the account manager can do the following:

- View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts.
- View any objectives that apply to all accounts.
- Review existing activities continuously, and create follow-up activities.

Scenario for Managing Plans for Contacts

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing plans for contacts, independent of the contact's relationship to an account. For example, the contact is a key opinion leader, a consultant, or researcher whose influence goes beyond the associated accounts.

The account manager or industry liaison performs the following tasks to manage the plan for a contact:

- 1** The account manager creates a business plan for each contact, prior to the planning period. The plan establishes the high-level goals for the contact for the associated period. An annual plan and typically child quarterly plans are available, particularly for important contacts.

Goal-related fields are likely to be qualitative targets rather than revenue targets. It is unlikely that any type of hierarchy exists, which is similar to the hierarchy of account plans that correspond to the overall account, operating units, and so on. For information on how to set up a business plan, see [Business Plans](#) (on page 247).
- 2** In the approval process for the business plan, the account manager changes the status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.
- 3** The account manager completes the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective can be to deliver a certain number of academic presentations. The account manager can associate specific activities and opportunities with either a business plan or an objective. For information on how to set up an objective, see [Objectives](#) (on page 253).
- 4** As opportunities arise (for example, an opportunity to deliver a lecture or fund research), the account manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see [Opportunities](#) (on page 210).

While performing the planning activities, the account manager can do the following:

- View plans, objectives, opportunities, and activities that are explicitly associated with a contact and associated accounts.
- View any objectives that apply to all contacts.
- Review existing activities continuously, and create follow-up activities and opportunities.

Scenario for Managing Plans for Objectives and Products

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing business plans that focus on plans, objectives, and products. The plans might be applied to a broad group of accounts. For example, for a strategic product launch, senior sales or marketing management creates business plans and objectives that are applied to all accounts (or a relevant subset), regardless of the specific detail in the individual account plans.

The senior sales management or marketing management with senior sales management approval typically perform the following tasks to manage the plan. How they manage the plan depends on how their organization implements access controls.

- 1 At the beginning of the annual and quarterly planning periods, the marketing manager creates the business plans for some product marketing initiatives. While the marketing organization might have a separate system for comprehensive, product-business planning, its use in this scenario is for high-priority initiatives that require special attention from the sales team. The business plans establish high-level quantitative and qualitative goals during the associated period. There might be an annual plan and child quarterly plans. The key metrics for the business plans typically include revenue. For information on how to set up a business plan, see [Business Plans](#) (on page 247).
- 2 The marketing manager might change the status of the business plans from Draft to Submitted. The required managers review, edit, and approve plans by changing the status to Final Approved. At the end of the planning period, the marketing manager changes the status of the plan to Expired to reduce the number of inactive plans.
- 3 The marketing manager adds more details to the plan, namely the objectives. Objectives are goals that are at a lower level in the plan, for example, activate sampling, or perform activities: make specific calls, visits, and so on. The marketing manager can associate the activities with either the business plan or the objectives. For information on how to set up an objective, see [Objectives](#) (on page 253).
- 4 The marketing manager applies the plan or objective to a group of accounts. The plan can apply to all accounts or a subset of accounts that are relevant to a particular product. The marketing manager attaches the business plan or objective to each relevant account. The account manager executes and evaluates the business plan or objective.
- 5 As sales opportunities arise, the account or marketing manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see [Opportunities](#) (on page 210).

While performing the planning activities, the account or marketing manager can do the following:

- View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts.
- View any objectives that apply to all accounts.
- Review existing activities continuously, and create follow-up activities and opportunities.

Business Plans

Use the Business Plan pages to create, update, and track business plans for accounts, contacts, or products. A *business plan* allows sales organizations to set strategic goals (for example, revenue targets) and action plans to achieve those goals, in the form of objectives, activities, and opportunities.

You can use business plans in a number of ways to accommodate company-specific planning processes. For example, you can create plans for individual accounts (for example, at the headquarters or territory level), or for a number of accounts (for example, all accounts in a sales representative's territory). You can create plans for contacts independent of their account affiliation, which is useful for managing relationships with key-opinion leaders, whose influence in an industry or field extends beyond their own account affiliation (for example, an influential medical researcher). You can create plans for products, for instance, to plan the launch

of a new product that will be sold to multiple accounts. For all these business plan types, the planning horizon can be short or long term. The business plan type is based on company-defined planning periods, typically months, quarters, and years.

Users can create hierarchies of business plans. A given business plan can have multiple child plans. Furthermore, a given plan can have associated objectives (for more information on objectives, see [Objectives](#) (on page 253)). A business plan sets high-level strategic goals, such as a revenue target. However, an objective sets a tactical goal, such as completing a number of sales calls, or attaining a certain number of new prescriptions at a medical practice.

Using business plans, you can integrate customer relationship management with business-planning tasks, workflows, and deliverables during the business-planning life cycle. By supporting the creation and management of account plans, a business plan supports selling to accounts and managing sales. A business plan consists of some general, plan information, and includes related plan objectives, opportunities, and activities. This plan information is also related to accounts because a business plan can be created for one account, for example, an account group parent and applied to a number of other accounts in a group.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking business plan information, the Business Plan tab might be excluded from your setup. Business Plans can be provisioned for Custom Objects 04-40 by contacting Customer Care.

Working with the Business Plan Homepage

The Business Plan Homepage is the starting point for managing business plans.

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

Creating a Business Plan

You can create a new business plan by clicking the New button in the Recently Viewed Business Plans section. For more information, see [Creating Records](#) (on page 38) and [Business Plan Fields](#) (on page 251).

Working with Business Plan Lists

The Business Plan Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for business plans.

Business Plan List	Filters
All Business Plans	All business plans to which you have visibility, regardless of who owns the business plan.
Recently Modified Business Plans	All business plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Business Plans

The Recently Modified Business Plans section shows the business plans that you viewed most recently.

Click Show Full List to expand the list.

Adding Sections to your Business Plan Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Business Plan Homepage:

- Recently Created Business Plans
- Recently Modified Business Plans
- My Recently Created Business Plans
- My Recently Modified Business Plans
- Additional report sections (Your company administrator can make report sections available for display on your Business Plan Homepage.)

To add sections to your Business Plan Homepage

- 1 On the Business Plan Homepage, click Edit Layout.
- 2 On the Business Plan Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about business plans:

- [Business Plans](#) (on page 247)
- [Business Plan Fields](#) (on page 251)
- [Managing Business Plans](#) (on page 249)

Managing Business Plans

For step-by-step procedures for managing business plans, see:

- [Linking Records to Your Selected Record](#) (on page 61)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Sharing Records \(Teams\)](#) (on page 84)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Business Plan pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity
- Period

Related Topics

See the following topics for related information about business plans:

- [Business Plans](#) (on page 247)
- [Working with the Business Plan Homepage](#) (on page 248)
- [Business Plan Fields](#) (on page 251)

Linking Records to Business Plans

You can link additional records to the business plan by adding sections to the Detail Page for the business plan record:

- Plan Accounts

- Plan Contacts
- Business Plans
- Objectives
- Plan Opportunities
- Activities

NOTE: A particular business plan can relate to multiple items of all the above entities. The entities prefaced with the term, *Plan*, are special entities that allow many-to-many relationships. A business plan, objective, or activity can relate to only one parent business plan. However, a plan account, plan contact, or plan opportunity allows multiple parent business plans. Allowing multiple parent plans accommodates the required flexibility in relating these entities to business plans.

For more information, see [Changing Your Detail Page Layout](#) (on page 619).

To link records to a business plan

- 1 On the Business Plan Detail page, click Edit Layout.
- 2 On the Business Plan Detail Layout page, click the arrows to add the section for the record, and to organize the sections on the page.
- 3 Click Save.

Business Plan Fields

Use the Business Plan Edit page to add a business plan, or update details for an existing business plan. The Business Plan Edit page shows the complete set of fields for a business plan.

TIP: You can also edit business plans on the Business Plan List page and the Business Plan Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Business Plan fields.

Field	Description
Key Plan Information	
Plan Name	The name of the business plan. (Required.)
Period	Specifies the period during which to complete the business plan. A planning period follows your company's fiscal calendar definition, as determined by your company administrator. A period can correspond to a fiscal year, quarter, month, or week, for example, Fiscal Quarter 1 2010. The available periods listed are based upon your company's defined fiscal calendar. For more information on defining fiscal calendars, see About Fiscal Calendars (on page 1012).

Field	Description
	NOTE: You require the Manage Period Administration privilege to select a period.
Period: Start Date	The starting date of a period. Click the Calendar icon to select the start date.
Period: End Date	The ending date of a period. Click the Calendar icon to select the end date.
Type	The business plan type. Choose the applicable type of business plan from the drop-down list. Example plan types are: Account, Local, Regional, National, Market Segment, Engagement, or Brand. (Required.)
Status	The business plan status. Choose the current status of the business plan from the drop-down list. Examples of the plan status are: Draft, Submitted, Final Approved, Current, Expired, Future, On Hold. (Required.)
Owner	The owner of the business plan, typically the user who creates the plan. Click the Lookup icon to choose the owner.
Description	The description of the business plan.
Product Name	The name of the product associated with this plan. Click the Lookup icon to choose a product.
Plan Revenue	The expected revenue associated with this plan.
Currency	The currency for any monetary amounts in this plan.
Exchange Date	The relevant date for converting any local revenue amounts to currencies used at headquarters.
Account	<p>The account associated with this business plan. Click the Lookup icon to choose an account.</p> <p>This field can be used in the case of a one-to-one relationship between the business plan and a specific account. If the business plan has more than one account associated with it, then use the intersection entity Plan Accounts to form the relationship.</p> <p>NOTE: The Account field is not available by default. To add this field to the Business Plan Detail page, contact your company administrator.</p>
SWOT Analysis	
Strengths	Competitive strengths with respect to achieving this plan. (This field has a limit of 240 characters.)
Weakness	Competitive weaknesses with respect to achieving this plan. (This field has a limit of 240 characters.)
Opportunities	Potential business opportunities associated with this plan. (This field has a limit of 240 characters.)
Threats	Potential threats that might limit business opportunities associated with this plan. (This field has a limit of 240 characters.)

Field	Description
NOTE: The following fields are available with Oracle CRM On Demand Partner Relationship Management Edition and might not be available for your configuration. If these fields are not available, contact your administrator.	
Owner Partner Account	The name of the Partner Account to which the owner of the business plan belongs.
Originating Partner Account	The name of the Partner Account that originated the business plan.
Principal Partner Account	The name of the Partner Account that is leading the effort on the business plan.

Related Topics

See the following topics for related information for business plans:

- [Business Plans](#) (on page 247)
- [Working with the Business Plan Homepage](#) (on page 248)
- [Managing Business Plans](#) (on page 249)

Objectives

Use the Objective pages to create, update, and track objectives for a business plan.

An *objective* is a tactical goal that you want to achieve, to attain a higher-level strategic goal in a business plan. Typically, you create an objective that is related to a business plan. While a business plan might establish an overall annual revenue goal for an account, an objective establishes a tactical goal, such as completing a number of sales calls, or attaining a certain number of new prescriptions at a medical practice. Objectives provide an intermediate level of planning, between setting high-level strategic goals with business plans, and low-level planning with activities (individual sales visits and calls) and opportunities (individual sales deals).

An objective does not have to be subsidiary to a business plan. Organizations can choose to use objectives differently. Like business plans, you can apply objectives to accounts, contacts, or products. A given objective can have multiple child objectives. You can set objectives for the short-term or long-term periods. The periods are based on company-defined planning periods, which are typically months, quarters, or years. Objectives are not as flexible as business plans. While a business plan can relate to multiple accounts and contacts, an objective can relate to only one account and one contact. In addition, while an opportunity can relate to multiple business plans, an opportunity can relate to only one objective.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Objective information, the Objective tab might be excluded from your setup. Objectives can be provisioned for Custom Objects 04-40 by contacting Customer Care.

Working with the Objective Homepage

The Objective Homepage is the starting point for managing objective records.

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

Creating an Objective

You can create a new objective by clicking the New button in the Recently Modified Objectives section. For more information, see [Creating Records](#) (on page 38) and [Objective Fields](#) (on page 256).

Working with Objective Lists

The Objective Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for objectives.

Objective List	Filters
All Objectives	All objectives to which you have visibility, regardless of who owns the objective.
Recently Modified Objectives	All objectives with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Objectives

The Recently Modified Objectives section shows the objectives that you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to Your Objective Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Objective Homepage:

- Recently Created Objectives
- Recently Modified Objectives
- My Recently Created Objectives

- My Recently Modified Objectives
- Additional report sections (Your company administrator can make report sections available for display on your Objective Homepage.)

To add sections to your Objective Homepage

- 1 On the Objective Homepage, click Edit Layout.
- 2 On the Objective Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Objectives

For step-by-step procedures that are common to many record types, see the following:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Objectives](#) (on page 256)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Sharing Records \(Teams\)](#) (on page 84)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Objective pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity

- Period

Related Topics

See the following topics for related information on objectives:

- [Objectives](#) (on page 253)
- [Working with the Objective Homepage](#) (on page 254)
- [Objective Fields](#) (on page 256)

Linking Records to Objectives

You can also link the following records to an objective by adding sections to the Detail Page for the objective record:

- Objectives
- Opportunities
- Activities

For more information, see [Changing Your Detail Page Layout](#) (on page 619).

To link records to an objective

- 1 On the Objective Detail page, click Edit Layout.
- 2 On the Objective Detail Layout page, click the arrows to add the section for the record, and to organize the sections on the page.
- 3 Click Save.

Objective Fields

Use the Objective Edit page to add an objective, or update details for an existing objective. The Objective Edit page shows the complete set of fields for an objective.

TIP: You can also edit objectives on the Objective List page and the Objective Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the objective fields.

Field	Description
Key Objective Information	

Field	Description
Objective Name	The name of the objective. (Required.)
Plan Name	The parent business plan associated with this objective. Select the business plan, using the Lookup icon.
Type	The general purpose of the objective. Examples are: Awareness, Education, Relationship, New account acquisition, Increase account penetration, Product trial, Special incentive, Account retention, and Competitive response. Select the type from the drop-down list. (Required.)
Status	The current status of the objective. Examples are: Draft, Submitted, Final Approved, Current, Expired, Future, and On Hold. Select the status from the drop-down list. (Required.)
Account Name	The account associated with this objective. Click the Lookup icon to select the account.
Contact Name	The contact associated with this objective. Click the Lookup icon to select the contact.
Product Name	The product associated with this objective. Click the Lookup icon to select the product.
Period	<p>A period defines the time within which to complete an objective. A period objective is determined by your company's fiscal calendar definition, which your company administrator defines. (Required.)</p> <p>A period can correspond to a fiscal year, quarter, month, or week, for example, Fiscal Quarter 1, 2010. The available periods listed are based upon your company's defined fiscal calendar. For more information on defining fiscal calendars, see About Fiscal Calendars (on page 1012).</p> <p>NOTE: You require the Manage Period Administration privilege to select a period.</p>
Period: Start Date	The starting date of a period. Click the Calendar icon to select the start date.
Period: End Date	The ending date of a period. Click the Calendar icon to select the end date.
Target Information	
Objective Revenue	The revenue target for this objective, for example 1,000,000.
Currency	The currency for the revenue (for example, USD or EURO). Click the currency icon to choose your required currency.
Exchange Date	The relevant date for converting local revenue into currencies that headquarters use.
Target Audience	The target group or organization for this objective, for example, physician practices specializing in cardiology.
Objective Target	The goal or outcome for this objective, expressed in objective units, for example, 1000 to represent 1000 customer calls.

Field	Description
Objective Units	The unit of expression for the objective target, for example, Sales Units, Number of Calls, dollars (\$), and so on. Click the drop-down list to select the objective unit.
Additional Information	
Description	The description of the objective.
Owner	The person who owns the objective, typically the creator of the objective. Click the Lookup icon to select the owner.

Related Topics

See the following topics for related information about objectives:

- [Objectives](#) (on page 253)
- [Working with the Objective Homepage](#) (on page 254)
- [Managing Objectives](#) (on page 255)

Plan Accounts

Use the Plan Account pages to create, update, and track plan accounts that are associated with business plans. A *plan account* maps accounts and business plans, in other words, you use plan accounts to associate accounts with business plans. A plan account allows an account to have multiple business plans (for example, one for a general sales force and one for a specialty sales force). However, a business plan covers multiple accounts (for example, all accounts in a territory).

It is possible that some users might not interact directly with the plan account record type. Instead, they associate accounts with business plans from the Business Plan Detail Page or from the Account Detail Page. Some users might prefer to work directly with the plan account record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking plan account information, the Plan Account tab might be excluded from your setup.

Working with the Plan Account Homepage

The Plan Account Homepage is the starting point for managing plan accounts.

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

Creating a Plan Account

You can create a new plan account by clicking the New button in the Recently Modified Plan Accounts section. For more information, see [Creating Records](#) (on page 38) and [Plan Account Fields](#) (on page 261).

Working with Plan Account Lists

The Plan Accounts Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan accounts.

Plan Account List	Filters
All Plan Accounts	All plan accounts to which you have visibility, regardless of who owns the plan account.
Recently Modified Plan Accounts	All plan accounts with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Accounts

The Recently Modified Plan Accounts section shows the plan accounts you modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Plan Account Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Objective Homepage:

- Recently Created Plan Accounts
- Recently Modified Plan Accounts
- My Recently Created Plan Accounts
- My Recently Modified Plan Accounts
- Additional report sections (Your company administrator can make report sections available for display on your Plan Account Homepage.)

To add sections to your Plan Account Homepage

- 1 On the Plan Account Homepage, click Edit Layout.

- 2 On the Plan Account Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Plan Accounts

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Account pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity
- Period

Related Information

See the following topics for related information about plan accounts:

- [Plan Accounts](#) (on page 258)
- [Working with the Plan Account Homepage](#) (on page 258)
- [Plan Account Fields](#) (on page 261)

Plan Account Fields

Use the Plan Account Edit page to add a plan account or update details for an existing plan account.

TIP: You can also edit plan accounts on the Plan Account List page and the Plan Account Detail page. For more information on updating records, see Updating Record Details.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan account fields.

Field	Description
Key Plan Account Information	
Account	The Oracle CRM On Demand account that is associated with this plan account record. Click the Lookup icon to select the associated account. (Required.) For more information on Account fields, see Account Fields (on page 192).
Primary Plan Account	Select this check box to indicate which account (if any) is the primary account associated with a plan.
Business Plan	The business plan that is associated with this plan account record. Click the Lookup icon to select the associated business plan. (Required.)
Account: Location	The location information from the Location field in the account record. It shows the type of facility operated by the account at this site, such as Headquarters. (View only.)
Account: Priority	The priority information from the Priority field in the account record. It shows the priority for the account, such as High, Medium, or Low. (View only.)
Account: Account Type	The account type information from the Account Type field in the account record. It shows the relationship of the account to your company, such as Prospect, Customer, Partner, or Competitor. (View only.)
Account: Reference	The reference information from the Reference check box in the account record. It indicates whether the account can be used as a reference for potential customers or sales representatives. (View only.)
Account: Owner	The owner information from the Owner field in the account record. It indicates the alias of the Account record owner. (View only.)

Related Information

See the following topics for related information about plan accounts:

- [Plan Accounts](#) (on page 258)
- [Working with the Plan Account Homepage](#) (on page 258)
- [Managing Plan Accounts](#) (on page 260)

Plan Contacts

Use the Plan Contact pages to create, update, and track contacts that are associated with business plans. A *plan contact* is a record that allows you to associate contacts with business plans, allowing each contact to have multiple business plans. For example, you can have one plan contact for a general sales force and one plan for a specialty sales force. At the same time, a plan contact allows a business plan to cover multiple contacts, for example, all the contacts in a territory.

Some users might not interact directly with the plan contact record type, but rather associate contacts with business plans from the Business Plan Detail page or from the Contact Detail page. Other users, however, might prefer to work directly with the plan contact record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Plan Contact information, the Plan Contact tab might be excluded from your setup.

Working with the Plan Contact Homepage

The Plan Contact Homepage is the starting point for managing plan contacts.

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

Creating a Plan Contact

You can create a new plan contact by clicking the New button in the Recently Modified Plan Contacts section. For more information, see [Creating Records](#) (on page 38) and [Plan Contact Fields](#) (on page 264).

Working with Plan Contact Lists

The Plan Contacts Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan contacts.

Plan Contact List	Filters
All Plan Contacts	All plan contacts to which you have visibility, regardless of who owns the plan account.
Recently Modified Plan Contacts	All plan contacts with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Contacts

The Recently Modified Plan Contacts section shows the plan contacts that have been modified most recently. To expand the list, click Show Full List.

Adding Sections to Your Plan Contact Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Plan Contact Homepage:

- Recently Created Plan Contacts
- Recently Modified Plan Contacts
- My Recently Created Plan Contacts
- My Recently Modified Plan Contacts
- Additional report sections (Your company administrator can make report sections available for display on your Plan Contact Homepage.)

To add sections to your Plan Contact Homepage

- 1 On the Plan Contact Homepage, click Edit Layout.
- 2 On the Plan Contact Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Plan Contacts

For step-by-step procedures for managing plan contacts that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Contact pages, you must have the following privileges in your user role:

- Manage Business Planning Access

■ Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity
- Period

Related Information

See the following topics for related information about plan contacts:

- [Plan Contacts](#) (on page 262)
- [Working with the Plan Contact Homepage](#) (on page 262)
- [Plan Contact Fields](#) (on page 264)

Plan Contact Fields

Use the Plan Contact Edit page to add a plan contact or update details for an existing plan contact. The Plan Contact Edit page shows the complete set of fields for a plan contact.

TIP: You can also edit plan contacts on the Plan Contact List page and the Plan Contact Detail page. For more information on updating records, see [Updating Record Details](#).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan contact fields.

Field	Description
Key Plan Contact Information	
Contact	The Oracle CRM On Demand contact that is associated with this plan contact record. Click the Lookup icon to select the associated contact. (Required.) For more information on contact fields, see Contact Fields (on page 206).
Primary Plan Contact	Select this check box to designate whether the contact is the main contact for the business plan.
Contact: First Name	The information from the First Name field in the contact record. (View-only.)
Contact: Last Name	The information from the Last Name field in the contact record. (View-only.)
Contact: Account	The account associated with the contact. (View-only.)

Field	Description
Business Plan	The business plan that is associated with this plan contact record. Click the Lookup icon to select the associated business plan. (Required.)

Related Topics

See the following topics for related information for plan contacts:

- [Plan Contacts](#) (on page 262)
- [Working with the Plan Contact Homepage](#) (on page 262)
- [Managing Plan Contacts](#) (on page 263)

Plan Opportunities

Use the Plan Opportunity pages to create, update, and track opportunities associated with a business plan. A *plan opportunity* associates opportunities with business plans, allowing an opportunity to be associated with multiple business plans (for example, one for a general sales force and one for a specialty sales force). A business plan can relate to multiple opportunities at the same time.

Some users might not interact directly with the plan opportunity record type, but rather associate opportunities with business plans from the Business Plan Detail page or from the Opportunity Detail page. However, other users might prefer to work directly with the plan opportunity record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Plan Opportunity information, the Plan Opportunity tab might be excluded from your setup.

Working with the Plan Opportunity Homepage

The Plan Opportunity Homepage is the starting point for managing plan opportunities.

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

Creating a Plan Opportunity

You can create a plan opportunity by clicking the New button in the Recently Modified Plan Opportunities section. For more information, see [Creating Records](#) (on page 38) and [Plan Opportunity Fields](#) (on page 267).

Working with Plan Opportunity Lists

The Plan Opportunities Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan opportunities.

Plan Opportunity List	Filters
All Plan Opportunities	All plan opportunities to which you have visibility, regardless of who owns the plan opportunity.
Recently Modified Plan Opportunities	All plan opportunities with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Opportunities

The Recently Modified Plan Opportunities section shows the plan opportunities that have been modified most recently. To expand the list, click Show Full List.

Adding Sections to Your Plan Opportunity Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Plan Opportunity Homepage:

- Recently Created Plan Opportunities
- Recently Modified Plan Opportunities
- My Recently Created Plan Opportunities
- My Recently Modified Plan Opportunities
- Additional report sections (Your company administrator can make report sections available for display on your Plan Opportunity Homepage.)

To add sections to your Plan Opportunity Homepage

- 1 On the Plan Opportunity Homepage, click Edit Layout.
- 2 On the Plan Opportunity Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Managing Plan Opportunities

For step-by-step procedures for managing plan opportunities that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Opportunity pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity
- Period

Related Information

See the following topics for related, plan opportunity information:

- [Plan Opportunities](#) (on page 265)
- [Working with the Plan Opportunity Homepage](#) (on page 265)
- [Plan Opportunity Fields](#) (on page 267)

Plan Opportunity Fields

Use the Plan Opportunity Edit page to add a plan opportunity or update details for an existing plan opportunity.

TIP: You can also edit plan opportunities on the Plan Opportunity List page and the Plan Opportunity Detail page. For more information on updating records, see [Updating Record Details](#).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan opportunity fields.

Field	Description
Plan Opportunity Information	
Business Plan	The business plan that is associated with this plan opportunity record. Click the Lookup icon to select the business plan. (Required.) For more information on business plans see Business Plans (on page 247).
Opportunity	The opportunity in Oracle CRM On Demand that is associated with this plan opportunity record. Click the Lookup icon to select the associated opportunity. (Required.) For more information on opportunities, see Opportunities (on page 210).
Opportunity: Account	The account associated with opportunity. (View-only.)
Opportunity: Close Date	The expected close date associated with the opportunity. (View-only.)
Opportunity: Forecast	If this check box is selected, it indicates that the opportunity is to be included in the forecast revenue calculation. (View-only.)
Opportunity: Owner	The information from the Owner field in the opportunity record. The owner is the person who is assigned to this opportunity. (View-only.)
Opportunity: Revenue	The potential revenue associated with the opportunity. (View-only.)

Related Topics

See the following topics for related information about plan opportunities:

- [Plan Opportunities](#) (on page 265)
- [Working with the Plan Opportunity Homepage](#) (on page 265)
- [Managing Plan Opportunities](#) (on page 267)

6 Service and Communications

Oracle CRM On Demand provides the following record types for information about customer services:

- **Service Requests.** Use these pages to manage service requests from customers for products or services.
- **Solutions.** Use these pages to store answers to common questions or service issues.
- **Communication.** Use these pages to manage customer interactions through your call center (Oracle Contact On Demand).

Managing Service and Communications

To manage service and communications, perform the following processes:

- 1 [Process of Creating a Service Request](#) (on page 269).
- 2 [Process of Working on a Service Request](#) (on page 270).
- 3 [Process of Resolving a Service Request](#) (on page 270).
- 4 [Process of Closing a Service Request](#) (on page 270).

Service requests can result from either incoming calls from the customer or customer calls received through Oracle CRM On Demand.

Process of Creating a Service Request

To create a service request, perform the following tasks:

- 1 Verify the customer information and record the service issue.
- 2 Use service scripts to consistently apply company procedures, such as identifying problems and escalating issues.

For more information about scripts, see [Using Service Request Scripts](#) (on page 274).

- 3 Assign service requests to service representatives, see [Assigning Service Requests](#) (on page 273).

Process of Working on a Service Request

To work on a service request, perform the following tasks:

- 1 Log the follow-up calls.
- 2 Log the tasks.
- 3 Log notes to record the actions taken to assist the customer.

For more information on adding activities to service requests, see [Creating Activities](#) (on page 120) and [Activity Fields](#) (on page 143).

Process of Resolving a Service Request

To resolve a service request, perform the following tasks:

- 1 Search the solutions library for information to help you to resolve the customer request, see [Reviewing Solutions](#) (on page 282).
- 2 Link the appropriate solutions to the service request and rate their usefulness, so that the library can be continuously monitored and improve, see [Rating Solutions](#) (on page 283).
- 3 Use prebuilt or custom reports to identify the issues, see [Running Reports](#) (on page 693).
- 4 Take immediate action to resolve them. If you cannot find a solution, add a new one to the library, see [Managing Solutions](#) (on page 282).

Process of Closing a Service Request

To close a service request, perform the following tasks:

- 1 Record the wrap-up activities.
- 2 Close the service request when it is resolved, see [Closing Resolved Service Requests](#) (on page 276).

Service Requests

Use the Service Request pages to record, track, and address customer requests for information or assistance. A *service request* holds all the relevant, detailed information about a particular service activity. You can also use the service request to capture additional information, such as solutions or activities required to resolve the

service request. Service representatives can access all the relevant information about service requests in one location. To ensure that a service request record captures all service activity, the changes to records are tracked through an audit trail. For information about dealing with service requests, see [Managing Service and Communications](#) (on page 269).

Working with the Service Request Homepage

The Service Request Homepage is the starting point for managing service requests.

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

Creating a Service Request

You can create a service request record by clicking the New button in the My Open Service Requests section. For more information about service requests, see [Assigning Service Requests](#) (on page 273) and [Service Request Fields](#) (on page 276).

Working with Service Request Lists

The Service Request Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for service requests.

Service Request List	Filters
All Service Requests	none
All Closed Service Requests	Status = Closed
All Escalated Service Requests	Status = Open - Escalated
All Open Service Requests	Status=Open, Status = Open - Escalated
All Recently Created Service Requests	All service requests, sorted by the created date
All Recently Modified Service Requests	All service requests, sorted by the modified date
My Open Service Requests	Status = Open (displays records containing your user name in the Owner field)
My Service Requests	Service Requests with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Open Service Requests

The My Open Service Requests section shows a list of your open service requests, in the order in which they were created. To expand the list, click the Show Full List link.

Viewing Service Request Related Tasks

The Service Request-Related Tasks section shows open service request-related tasks assigned to you, sorted by due date and then priority. It shows this information:

- **Due Date.** Date task is due as set by you or your manager.
- **Priority.** Priority for tasks as set by you or your manager, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.
- **Subject.** Title of task. Click the link to review the task.
- **Service Request.** Number the system assigns to identify the service request.

Click Show Full List to expand the list of service request-related tasks.

Viewing Open Service Request Reports

The Open Service Request Analysis section shows service request reports by source, product area, user name, or priority. You can click a chart section or table item to see the details and to determine what needs to be done to resolve issues today. You can also change the categories in the drop-down list to view the same data from another perspective.

For example, you can:

- Use this analysis to keep informed about open and escalated service requests.
- Filter by Product Area to see which areas are generating the most calls.
- Filter by User Name to see how the workload is spread across the team.
- Filter by Priority to see the level of service issues being reported.

To see other types of service analyses, go to the Reports Homepage.

Adding Sections to Your Service Request Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Service Request Homepage:

- Service Request-Related Tasks
- My Current Service Request Related Tasks (tasks that are due today)

- Additional report sections (your company administrator can make report sections available for display on your Service Requests Homepage)

To add sections to your Service Request Homepage

- 1 On the Service Request Homepage, click the Edit Layout link.
- 2 On the Service Request Homepage Layout page, use the directional arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

Managing Service Requests

To manage service requests, do the following tasks:

- [Assigning Service Requests](#) (on page 273)
- [Using Service Request Scripts](#) (on page 274)
- [Adding Solutions to Service Requests](#) (on page 275)
- [Escalating Service Requests](#) (on page 275)
- [Closing Resolved Service Requests](#) (on page 276)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Viewing Audit Trails for Records](#) (on page 105)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Assigning Service Requests

When you create a service request, the owner field is blank. You can either assign the owner manually or, if your company is using assignment manager, the owner is automatically assigned when you save the record.

If a service request has already been assigned, you can reassign the request in any of the following ways:

- Change the owner name.

- Select the Reassign Owner check box.
- Delete the owner's name.

Selecting the Reassign Owner check box or deleting the owner's name triggers assignment manager to process the service request again and assign it according to the rules set up by your company.

NOTE: If a service request has a status of closed, it is ignored by the assignment manager and is not reassigned.

The name in the Owner field is changed when you save the record. However, the processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

To manually assign a service request

- 1 Find the service request.
For instructions on finding service requests, see [Finding Records](#) (on page 41).
- 2 On the Service Request List page, position your cursor in the Owner field and then click the Lookup icon.
- 3 In the Lookup window, search for the person and click select.

Using Service Request Scripts

Your company administrator might have set up the assessment scripts to help you to gather information about the service requests (Call Scripts), or to assess the customer satisfaction levels (Customer Satisfaction Surveys). An assessment script consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see [About Assessment Scripts](#) (on page 1477).

To use a service request script

- 1 Select the service request.
For more information on selecting service requests, see [Finding Records](#) (on page 41).
- 2 On the Service Request Detail page, scroll down to the Call Scripts section or the Customer Satisfaction Surveys section and click Add.
NOTE: If the Call Scripts section or the Customer Satisfaction Surveys section is not shown, click the Edit Layout link in the upper-right corner of the page, and add the appropriate section to your page layout. These sections are only available to add to your page if your company administrator has set them up.
- 3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.

- 4 In the Call Scripts or Customer Satisfaction Survey window, select the answer for each script question, and then click Save.

The Service Request Detail page appears again. Depending on the outcome of the script, some of the fields on the record might have been automatically updated.

Adding Solutions to Service Requests

You can add an existing solution to your service requests. For more information on solutions, see [Solutions](#) (on page 278).

To add a solution to a service request

- 1 Select the service request.
For more information on selecting service requests, see [Finding Records](#) (on page 41).
- 2 Scroll to the Solutions section of the Service Request Details page and click Add.
A list of solutions that are approved and published appears.
- 3 To limit the number of solutions that appear, use the filtering options to search on keywords or Solution ID.
- 4 Click Preview to view the solution details to make sure that it addresses your customer's concerns.
- 5 Click the Select link beside each solution that you want to add to your service request, and then click OK.
- 6 Change the status of the service request to Pending until you can confirm with your customer that the problem is resolved, as follows:
 - a On the Service Request Details page, click in the Status field, and select the Pending status from the drop-down list.
 - b Click the green check mark icon in the Status field to save the change.

Escalating Service Requests

You can escalate a service request so that it stands out as an urgent matter.

To escalate a service request

- 1 On the Service Request List page, click in the Status field of the Service Request you want to escalate.
- 2 Select Open-Escalated from the drop-down list in the field.
- 3 Click the green check mark icon in the Status field to save the change.

Your company policy determines what actions are taken when a service request is escalated. For example, your company administrator might define a workflow rule that sends an email or generates a task when a service request is escalated.

You can create a filtered list to show all escalated service requests to which you have access.

Closing Resolved Service Requests

After you have satisfactorily answered your customer's request, you can close the service request.

Before you begin: View the Service Request detail page to make sure that the service request is complete by verifying the following:

- All activities on the service request have a Completed status, indicating that you have followed up with your customer.
- If your company uses solutions, the solution is linked to the service request record, indicating how the problem was solved.

To close a resolved service request

- 1 On the Service Request List page, click in the Status field of the Service Request you want to close.
- 2 Select Closed from the drop-down list in the field.
- 3 Click the green check mark icon in the Status field to save the change.

Service Request Fields

Use the Service Request Edit page to add a service request or update details for an existing service request.

TIP: You can also edit service requests on the Service Request List page and the Service Request Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

The Service Request Edit page shows the complete set of fields for a service request, as shown in the following table.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Contact Information	
SR Number	Service request ID. System-generated.
Account	Account linked to the service request.

Field	Description
Contact	Contact linked to the service request.
Work Phone #	Work phone number of the contact. Inherited from the Contact record.
Email	Email address of contact. Inherited from the Contact record.
Service Detail Information	
Area	Category of service request, such as Product, Installation, Maintenance, Training, Other.
Cause	Reason for service request, such as Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Type	Type of service request, such as Question, Issue, Enhancement Request, Other.
Source	Method by which service request is received, such as Phone, Web, Email, Fax.
Priority	Indication of priority, such as 1-ASAP, 2-High, 3-Medium, 4-Low.
Status	Status of service request, such as Open, Pending, Closed, Open-Escalated, Cancelled. Some filtered lists and reports use the Status field to determine which service requests to include.
Opened Time	Date and time you created the service request. System-generated.
Closed Time	Date and time status of service request changes to Closed. System-generated.
Owner	<p>Alias of the record owner. Generally, the owner can update the record details, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>
Reassign Owner	<p>Indicates that the service request should be reassigned. If your company administrator has set up service request assignment rules, selecting this field triggers assignment manager to process the service request again and assign it according to the rules.</p> <p>NOTE: When you select this check box, the name in the Owner field changes when you save the record. However, depending on the complexity of your company's assignment rules, the number of records to be reassigned and the current system load, it may take some time for the tasks that are automatically performed to be completed, for example, sending the notification email.</p>
Additional Information	
Subject	Summary of service request.
Description	Additional information about the service request. Limit of 16,350 characters.
Vehicle	The Vehicle ID Number (VIN) if a vehicle is associated with the service

Field	Description
	request.

Solutions

Use the Solution pages to create, update, and track solutions. *Solutions* contain information about how to resolve a customer problem. By maintaining a knowledge base of solutions, your service representatives have access to a centralized knowledge base to help them resolve customer problems. In addition, the knowledge base expands as users interact with customers and create new solutions.

Oracle CRM On Demand tracks the usage of solutions and enables users to rate solutions. This information helps organizations to improve the solutions that they provide to customers and to identify problems in products or services. Frequently used solutions might indicate a product defect. Poor solution ratings might indicate the need to improve solutions.

About Managing Solutions

Consider implementing a process similar to the following to build and manage a knowledge base of solutions:

- 1 A company administrator imports your existing solutions into the application (optional).
- 2 Service agents and other experts add draft solutions to expand the breadth and depth of your knowledge base over time.
- 3 Service managers review, approve, and publish solutions.
- 4 Agents score existing solutions to make sure the most helpful solutions rise to the top.
- 5 Service managers monitor the solutions knowledge base to ensure that only valid and current information is represented.

Best Practice Tips for Managing Your Solutions Knowledge Base

Having a well-organized and peer-evaluated library of solutions helps you consistently serve your customers more effectively. Here are some best practice tips for setting up and managing your solutions knowledge base.

1 – Import Your Existing Solutions

Before you import solutions, compare the information in your existing solutions with the Solution record in Oracle CRM On Demand. You might want to add, rename, or remove fields from the record to match the information that you want to import.

You can use the Custom Field Setup Template, available in the Tools and Templates page in the Training & Support Center, to help you plan changes. This document will help you plan for and keep track of any custom changes that you want to make to the application.

2 – Add Draft Solutions

Establish guidelines for creating solution records and communicate these to anyone who might create draft solutions, such as service agents, product or, service experts. Be sure to emphasize the importance of the Title field in a solution record. This is a searchable field which appears on most lists and Lookup windows for solutions. Therefore, service agents will use it to quickly identify appropriate solutions to their questions or problems.

When a new solution record is created, it has a status of Draft. Draft solutions are not available to be added to service request records and will not appear in the solution Lookup window until they are published. So, if an agent creates a Service Request and enters a draft solution during the call, the agent can add the draft solution to the Service Request, but the draft solution will not be accessible to other agents until it is published.

3 – Review, Approve, and Publish Solutions

The approval process ensures that your identified experts get a chance to review all solutions before releasing them for general use by your service agents. Establish review and approval guidelines to ensure that all solutions are valid, easy to follow, and consistently useful to those who need them.

You must have a role with the Publish Solutions privilege to change a solution status to Approved and to publish the solution. For more information, see [Approving and Publishing Solutions](#) (on page 283).

4 – Rate Solutions

Ask your service agents to rate the solutions that they use and add to their service request records. They can easily do this from the Solution Detail page by clicking the Rate Solution button. Solutions are rated on a 1 – 5 scale. If the solution was highly effective, rate it a 5. If it was not effective or valid, rate it a 1.

Every time a solution is rated, its rating score is recalculated and displayed on the record. Having your agents rate the solutions gives you information you can use to monitor the quality of your knowledge base. For more information, see [Rating Solutions](#) (on page 283).

5 – Monitor Solutions

Make sure that you regularly monitor your solutions knowledge base so that your service agents have the best and most current information and instructions. Some recommendations are:

- Assign an owner for certain areas or types of solutions and have each owner regularly review and update those solutions. Make each owner responsible for the accuracy and approval of his or her area.
- Over time, your solutions can become obsolete. Solutions related to products that are no longer supported are just one example. Create a Solution list to locate these solutions, filtering by the Product field, for example. Then, use the Mass Update feature to remove them from the searchable solutions.
- Do not delete a solution, unless it is a duplicate. Instead, set the status to Obsolete. Obsolete solutions no longer appear on the list when searching for a solution to add to a service request. However, you can still use the lists on the Solutions Homepage to access them if you need them.
- Review all solutions that are rated low. To find them, create a custom list that shows you all published solutions rated a 1 or 2.
- Use the prebuilt Solution lists on the Solutions Homepage to review your top-rated solutions and most active solutions. By doing so, you have an indication of any areas where you can potentially add more knowledge and expand your library.

- Routinely analyze your closed service requests for trends, and identify key problem areas where additional information should be added to your knowledge base.

Working with the Solution Homepage

The Solution Homepage is the starting point for managing solutions.

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

Creating a Solution Record

You can create a solution record by clicking the New button in the My Recently Viewed Solutions section. For more information, see [Creating Records](#) (on page 38) and [Solution Fields](#) (on page 284).

Working with the Solution Lists

The Solution Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for Solutions.

Solution List	Filters
Approved Solutions	Status = Approved
Published Solutions	Published = Y
Recently Created Solutions	All solutions, sorted by the created date
Recently Modified Solutions	All solutions, sorted by the modified date
Draft Solutions (visible only to users with the Publish Solutions privilege)	Status = Draft
Highest Rated Solutions	Highest cumulative ratings given by all individuals
Most Active Solutions	Frequently linked with Service Requests
All Solutions	All solutions, sorted alphabetically on Solution Title
My Recently Modified Solutions	All solutions you own, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Solutions

The My Recently Viewed Solutions section shows the solutions that you viewed most recently.

To expand the list, click the Show Full List link.

Viewing Most Active Solutions

The Most Active Solutions section shows the solutions that have been frequently linked with service requests. High usage can indicate to a service organization the specific areas where customers are being challenged by product and services. Organizations can respond by providing more information to service representatives to help customers or by providing more information to customers directly.

Viewing Highest Rated Solutions

The Highest Rated Solutions section lists the solutions with the highest cumulative ratings given by all individuals.

Adding Sections to Your Solution Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Solution Homepage:

- Recently Created Solutions
- Recently Modified Solutions
- My Recently Created Solutions
- My Recently Modified Solutions
- One or more report sections (Your company administrator can make reports available on your Solution Homepage.)

The following procedure describes how to add sections to your Solution Homepage.

To add sections to your Solution Homepage

- 1** On the Solution Homepage, click Edit Layout.
- 2** On the Solution Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3** Click Save.

Managing Solutions

To manage solutions, perform the following processes:

- [Reviewing Solutions](#) (on page 282)
- [Approving and Publishing Solutions](#) (on page 283)
- [Rating Solutions](#) (on page 283)
- [Adding Books to a Solution](#) (on page 284)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Attaching Files and URLs to Records](#) (on page 94)

NOTE: To update solution records, your user role must include the Publish Solutions privilege.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- [Solution Fields](#) (on page 284)
- [Reports](#) (on page 675)
- [Importing Your Data](#) (on page 1448)

Reviewing Solutions

You can review the most active solutions or the highest rated solutions. You can also review the complete information for any solution record.

To review the most active solutions

- 1 From any page, click the Solutions tab.
- 2 In the Most Active Solutions section, click the Solution Title link for the solution you want to review.

To review the highest rated solutions

- 1 From any page, click the Solutions tab.
- 2 In the Highest Rated Solutions section, click the Solution Title link for the solution you want to review.

To review solution information

- 1 Select the solution.
For instructions on selecting solutions, see [Finding Records](#) (on page 41).
- 2 On the Solution Detail page, you can review the solution record.
For a description of fields, see [Solution Fields](#) (on page 284).

Approving and Publishing Solutions

Before you begin. To perform this procedure, your user role must include the Publish Solutions privilege.

You can review solutions for accuracy and completeness. Then you can approve the draft and publish it internally. Publishing a solution internally makes it available for all customer service representatives to use and link to service requests.

To approve and publish a solution

- 1 From the Solutions Homepage, click the Draft Solutions link.
- 2 From the Solutions List page, select the solution and then click Edit.
- 3 On the Solution Edit page, change the Status to Approved to approve the solution.
- 4 To publish the solution, select the Published check box.
- 5 Save the record.

Rating Solutions

You can rate the effectiveness of a solution as many times as you want to.

To rate solution information

- 1 Select the solution.
For instructions on selecting solution, see [Finding Records](#) (on page 41).
- 2 In the Solution Details title bar, click the Rate Solution button.

- 3 On the Solution Rating page, select a rating from 1 to 5 (5 is the best) from the drop-down list.
- 4 Save the record.

Individual user ratings are averaged to determine which solutions appear in the Highest Rated Solutions section on the Solutions Homepage.

Adding Books to a Solution

Use the following procedure to add books to a solution. When you add a book to a solution, you can modify or remove the book. This procedure assumes that the Books record type is displayed as a related item on the Solution page. For more information about customizing related item information, see [Customizing Related Item Layouts](#) (on page 1056).

To add a book to a solution

- 1 On the Solution List page, open the solution that you want.
- 2 On the Solution Detail page, click Add in the Books section of the page.
- 3 In the Book selector, choose the book that you want to add to the solution, and then click OK.

For more information about books, see [Book Management](#) (on page 1177).

Solution Fields

Use the Solution Edit page to add a solution or update details for an existing solution. The Solution Edit page shows the complete set of fields for a solution.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Solution Detail Information	
Solution ID	Unique ID of the solution. System-generated.
Title	Solution title. This field has a limit of 100 characters and is required.
Status	Solution's status, such as Draft, Approved, or Obsolete. Defaults to Draft. Only users with the Publish Solutions privilege can change this information.
Published	Indication that the solution is available for internal use. Only users with the Publish Solutions privilege can change this information.

Field	Description
Solution Rating	Rating of the solution from 1 to 5 (5 is the best).
Additional Information	
NOTE: The following fields are available with Oracle CRM On Demand Life Sciences Edition and might not be available for your configuration. If these fields are not available, contact your company administrator.	
Legal Approval	Indicates that the solution has received legal approval.
Marketing Approval	Indicates that the solution has received marketing approval.
Multi-file asset	Indicates that the solution consists of multiple digital files. A given solution image might consist of separate files for photos, logos, and other components of a larger image.
Expiration Date	The date after which this content must not be used in Personalized Content Delivery (PCD). Use the calendar icon to select the expiration date.
Release Date	The date after which this content can be used in PCD. Use the calendar icon to select the release date.
Verification Status	Indicates whether the solution can be displayed correctly. When users load multimedia or graphic files, they test them to make sure that they are displayed correctly, and they set the verification status to Successful. The values are: Not Verified, Successful, or Failed.
PCD Attachment Type	Indicates the type of the attached multimedia or graphic file: <ul style="list-style-type: none"> ■ Message. The content is suitable for a presentation. ■ Thumbnail. The content is a smaller, compressed version of a larger message record.
Related Thumbnail Image	The name of another solution record that provides a small thumbnail version of the main message solution. Each solution of the type Message must have a matching solution of the type Thumbnail.
Distribution Method	Select Publish to distribute the content automatically to remote users. The distribution is based on users' permissions.
NOTE: The following fields are available by default for all editions of Oracle CRM On Demand.	
FAQ	Frequently asked questions about the solution.
Solution Details	Additional information about the solution.

Communications

Use the Communication pages together with the Communication Tools and Voice Controls sections in the Action bar to manage customer interactions—phone calls, voicemail messages, and emails. Supervisors can also monitor agents, using these same areas of the application.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include using Oracle Contact On Demand, then the Communications tab and its subtabs might be excluded from your setup.

About Oracle Contact On Demand

Oracle Contact On Demand allows you to use voice, voicemail, and email to manage customer interactions. Because of its integration with Oracle CRM On Demand, each customer interaction is tracked and stored in the same location that your company uses to manage its contacts, accounts, solutions, and so on. This integration allows you to leverage the information in your company's database to find solutions to customer issues, update contact information, and run analytics against your data.

Oracle Contact On Demand is a Web-based call center that uses these channels:

■ Voice

Oracle Contact On Demand allows you to establish real-time voice communication and uses skills based routing to forward calls to the appropriate agent. The call controls built into the interface allow you to receive calls, place outbound (external) calls and internal (agent-to-agent) calls, place a call on hold, hang up (close) a call, transfer a call, and conference in other parties. The feature includes these capabilities:

- **Inbound calls.** Receive and work with an inbound call through the Oracle Contact On Demand interface anywhere there is a telephone, provided you are logged in to Oracle Contact On Demand.
- **Outbound calls.** Oracle Contact On Demand supports outbound dialing to U.S. (domestic) and international locations. Calls can be placed from the Oracle Contact On Demand toolbar.
- **Call Control.** All calls are handled through the Communication Tools and Voice Controls sections in the Action bar, and the Calls subtab on the Communications Homepage. Other information passed with the call (for example caller name, telephone number, and 800 destination) is only displayed if configured.
- **Internal calls.** Contact another agent or supervisor logged into Oracle Contact On Demand by selecting the desired agent or supervisor from a drop-down list of active users.
- **Skills-based Routing.** Voice calls are routed to the most qualified agent to handle the call (that is, defined by customer touch-tone selection through IVR).
- **Statistics Window.** Provides real-time statistics on call progress in the Oracle Contact On Demand application. The window displays the current state, the time in the state, the number of calls in the queue, and the call that has been waiting in the queue the longest.
- **Click-to-Dial.** Outbound calls are placed by clicking the phone number link in the Details or List pages.
- **Supervisor Control.** Supervisors can record and listen to previously recorded phone calls for quality assurance purposes. In addition, supervisors can monitor agents real-time and invoke actions such as whisper, coach, join, take over, and log agents out.

- **Callback.** Administrators can set up Oracle Contact On Demand so that if agents are busy, the caller can continue waiting for the next available agent. Alternatively, the caller can receive a callback as soon as an agent is available. Oracle Contact On Demand allocates the call a place in the queue. When an agent is free to answer the call, the call center server automatically calls the caller back with his or her contact phone number, and connects the caller to the available agent. The agent receives the incoming call.
- **Web callback.** A Web callback is similar to a callback, except that the customer enters his or her phone number on a company's Web page, rather than using the phone. For example, a potential customer visits a company's Web page, and the company Web page requests the customer to enter his or her phone number if the customer wants to receive a callback from an agent. An Oracle Contact On Demand administrator is responsible for administering this feature for customers. For more information on configuring the Web callback feature, see *Oracle Contact On Demand Administration Manager Guide*.
- **Voicemail.** The voicemail channel for Oracle Contact On Demand uses skill-based routing to forward messages to the appropriate agent. Each Oracle Contact On Demand company defines when and how voicemail is offered to a caller. Applying the intelligent routing in Oracle Contact On Demand provides a rapid response to callers who choose to leave a voice message. This response has the same quality and priority as regular telephone calls. Agents can listen to the caller's message and reassign it to another agent or workgroup, if necessary. You can access the voicemail through the activity record, even after it is wrapped up. Voicemails can be played back on a local media player or on a phone.

■ Email

Emails are routed to an agent's email, according to keywords in the email or the agent's skills. Emails can be responded to, discarded, and reassigned to another agent or workgroup. Agents are given limits on the number of emails they can work on at a time. To review these limits, the agent can click Statistics in the Action bar and review the Offline Messages line.

About IVR

Underlying the Voice and Voicemail channels is Interactive Voice Response (IVR). IVR uses underlying touch-tone recognition and Oracle Contact On Demand skill-based routing.

Touch-tone recognition permits the IVR to answer a call, play a prerecorded message, and prompt the customers to indicate the nature of their query and route them to an appropriate agent (for example, by pressing 1 for Sales). If your company administrator has configured screen pops that are based on IVR prompts, the values entered by a caller with a touch-tone phone take precedence over the search criteria described under the heading, About Matching Records in Oracle Contact On Demand. IVR prompts support only the following: service request number, contact home phone number, and campaign ID.

Service request numbers in Oracle CRM On Demand contain a hyphen. However, when a caller enters a service request number in response to an IVR prompt, you must advise the caller to use an asterisk (*) to indicate the hyphen in the IVR prompt.

NOTE: Contact home phone number is not included in the standard Contact page layout.

About Matching Records in Oracle Contact On Demand

When an agent receives a communication from a customer, Oracle Contact On Demand does the following:

- 1 Searches existing records in the Oracle CRM On Demand database to try to find a match in Contact, Lead, Account, Service Request, and Campaign records.

For phone calls, the application looks for matches based on:

- Originator phone number (which phone number the customer is dialing from). This information is captured in the Origin field. In a campaign, the originator phone number is the campaign phone number that the customer calls.

For emails, the application looks for matches based on:

- Originator email address. This information is captured in the Origin field.

For campaign records to include phone numbers and email address fields, which are used to determine matches, your company administrator must customize the Campaign Detail page layout page in order to add the Campaign Email and Campaign Phone Number fields manually.

In Oracle Contact On Demand, service requests are associated with an activity only if an IVR prompt has been set up for that activity. For example, Oracle Contact On Demand searches for a matching contact home phone number only if the company administrator has configured an IVR prompt so that a caller is prompted to enter a home phone number. To match a contact home phone number, your company administrator must customize the standard Contact Detail page layout to include a contact home phone number field and must enter a valid contact home phone number in this field. For information on customizing page layouts, see [Customizing Static Page Layouts](#) (on page 1057).

- 2 When the search is complete, an activity record is created for the communication, which is linked to the matching record.

The following are the possible results of a search:

- If a unique service request is found, Oracle Contact On Demand associates the activity record with both the service request record and the service request's primary account. Oracle Contact On Demand also associates the activity record with the service request's contact unless it finds a unique contact match for the phone number.
- If a unique contact match is found, Oracle Contact On Demand automatically associates the activity record with both the contact and the contact's primary account.
- If a unique lead match is found, Oracle Contact On Demand automatically associates the activity with both the lead and the lead's primary account.
- If a unique record match does not have an associated account, Oracle Contact On Demand automatically associates the unique account that matched the phone number, if a phone number exists.
- If a single match is found, the matching record appears.
- If multiple matches are found for a particular record type, Oracle Contact On Demand does not link the activity to a specific record for this record type.

NOTE: You must have access to a specific record type or else Oracle Contact On Demand cannot associate an activity with this record type.

NOTE: If an agent transfers a call to another agent, an activity will be created for the agent to whom the call is transferred.

Managing the Call Center

As a supervisor, you need tools and information to help you operate your call center effectively. You need to know how many calls, emails, and voicemails your team handles. You need to ask the following questions: what is the average handle time for each interaction: how long are customers waiting in the queue: and so on. Access to real-time information about your operations can help you to manage your call center and even pinpoint improvement opportunities for individual agents.

Oracle Contact On Demand Supervisor Tools

Oracle CRM On Demand and Oracle Contact On Demand have several tools to help you manage your call center. Every customer communication can be tracked and linked to customer records. This tracking feature builds a database of information about your operations and your customers, which you can access using reports and analyses. Agent-monitoring tools can also help you to coach individual agent performance.

Communications Dashboard

The Communications Dashboard shows real-time statistics about your call center queues to help you analyze performance.

- Click the Dashboard tab and select the Communications dashboard from the drop-down list. Click Show.
- View the current number of customer interactions in each of your communication channels.
- Review individual workgroup statistics to help you analyze your call center volumes and manage your workforce.
- Click the Additional Reports link to select a different dashboard to view other service or sales analyses.

Communications Reports and Analyses

The Reports Homepage contains links to prebuilt and custom-built analyses that can help you manage your call center. Review custom and prebuilt analyses regularly to identify call center trends, potential risks, and opportunities for improvement.

You can use Oracle CRM On Demand Answers to design customized reports to analyze the communications activities generated by your call center interactions. When you create a custom analysis:

- Use the Activities reporting subject area to build a communications-specific analysis.
- Expand the Activity folder, and then the Communication folder.
- Click the Oracle Contact On Demand data column names to add them to your custom analysis.

For further information, see [Reports](#) (on page 675).

Working with the Communication Homepage

The Communication Homepage is the starting point for managing customer interaction.

Viewing Customer Interactions

The Inbox section lists all customer interactions currently assigned to you for the channel you have chosen in the sub tabs (Calls, Voicemail, or Email). For a description of the fields (columns), see [Wrapping Up Communication Activities](#) (on page 302). You can determine the period during which the Communication Homepage Inbox displays the current and completed activities in your personal profile. For more information, see [Updating Your Personal Details](#) (on page 604).

Working with Communications Lists

The Communications Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for communications:

This Activities List	Displays
All Aging Emails	All emails you can see that have been open longer than 24 hours.
All Aging Voicemails	All voicemails you can see that have been open longer than 24 hours.
All Callbacks	All Web callbacks and callbacks you can see.
All Emails	All emails you can see.
All Inbound Calls	All inbound calls you can see.
All Inbound Emails	All inbound emails you can see.
All Outbound Calls	All outbound calls you can see.
All Outbound Emails	All outbound emails you can see.
All Transfers	All transfers you can see.
All Voice Calls	All phone calls.
All Voicemails	All voicemails.
All Web Callbacks	All Web callbacks you can see.
My Communications Inbox	All customer interactions currently assigned to you. No new, incomplete emails appear in this list.
My Calls Inbox	Incomplete calls assigned to you.
My Voicemails Inbox	Incomplete Voicemails assigned to you.
Recently Completed Communications	All communications you have recently completed.
Recently Completed Calls	Calls you have recently completed.

This Activities List	Displays
Recently Completed Emails	Emails for which you have sent a reply.
Recently Completed Voicemails	Voicemails you have recently completed.

To view a list, click the list name.

To create a new list, click New List. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Completed Communications

The Recently Completed Communications section lists your most recently completed interactions. For a description of the fields (columns), see [Wrapping Up Communication Activities](#) (on page 302).

To expand the list of most recently completed communications, click Show Full List. This list displays a full page of records, which you can scroll through page by page.

Related Topics

See the following topics for related information:

- [About Oracle Contact On Demand](#) (on page 286)
- [Managing Oracle Contact On Demand](#) (on page 291)

Managing Oracle Contact On Demand

To manage Oracle Contact On Demand, perform the following tasks:

- [Preparing for Interacting with Customers](#) (on page 292)
- [Handling Phone Calls](#) (on page 294)
- [Disabling the Communications Toolbar in a Browser Session](#) (on page 297)
- [Placing Calls](#) (on page 298)
- [Handling Callbacks \(Web and Phone\)](#) (on page 299)
- [Handling Voicemail Messages](#) (on page 299)
- [Handling Emails](#) (on page 300)
- [Wrapping Up Communication Activities](#) (on page 302)
- [Reviewing Your Statistics](#) (on page 305)
- [Viewing Interaction Histories](#) (on page 306)
- [Monitoring Agents](#) (on page 306)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Preparing for Interacting with Customers

The following topics contain step-by-step procedures used in preparing to interact with customers.

Accessing Oracle Contact On Demand

When you sign in to Oracle CRM On Demand, the Communications tab should appear along with Accounts, Contacts, and so on. If it does not appear, do the following:

- Click the arrow to the right of the row of tabs, and select Communications from the drop-down list.

NOTE: If Communications does not appear as an option, you might have to add the tab to your layout or contact your company administrator. For instructions on displaying tabs, see [Displaying Your Tabs](#) (on page 619).

Updating Your Phone Number

When you want to receive phone calls at another location, be sure to update your phone number. The phone number that you enter is the one where the application directs your phone calls.

To update your phone number

- 1 In the Communication Tools section in the Action bar, click User Preference.
- 2 In the Configuration window, update the Phone Settings:
 - **SIP Address.** Protocol standard for receiving VoIP phone calls. Update this field if your company uses SIP-based VoIP.
 - **Outside Phone (Remote Extension).** Phone number where Oracle Contact On Demand routes your incoming calls. You can update this phone number at any time.
 - **Play Announcement.** Prompts you to press a digit (DTMF key) before the call is routed to you.

TIP: If you work from home, you might want to select this option. This option prevents other people, such as children, from accidentally picking up a phone call routed from the call center.
- 3 Click OK to close the Configuration window.
The new settings take effect immediately.

Setting User Preferences

To change your personal greeting, work off hook, and change other phone-handling behavior, you need to update your user settings.

To set your user preferences

- 1 In the Communication Tools section in the Action bar, click User Preference.
- 2 In the Configuration window, select the General Phone and Voicemail Prompt settings you want:

Setting	Description
General Phone	
Incoming Call Screen Pop	Automatically opens the Service Request, Campaign, Contact, Lead, Account, or Call Detail page when you answer a phone call. The application searches the Oracle CRM On Demand database for existing records that match the caller's phone number. If one match is found, the matching record appears (Service Request, Contact, Lead, or Account record). The Call Detail page appears in other cases, for example, if there is no match, or if there are multiple matches. For more information on matching records in Oracle CRM On Demand, see About Oracle Contact On Demand (on page 286).
Work Off Hook (Disable Dial Tone)	Keeps your line open after the first call is taken so that you do not have to pick up your phone to answer it. Instead, you can use the Voice Controls section in the Action bar to answer the phone.
Automatic Call Acceptance	(Available only when working off hook) Automatically accepts the inbound call so callers are connected without you taking any additional steps. A beep alerts the agent to indicate there is a caller on the line.
Phone Settings	For information on the Phone Settings options, see "Updating Your Phone Number", above.
Voicemail Prompt	
Agent Name Prompt Wav File	Recording that states your name.
Voicemail Greeting prompt Wav File	Recording that plays when a call is routed to your voicemail.
Welcome Prompt Wav File	Recording that plays when a customer is routed to your phone number.
Record a personalized prompt	Records your personal message. This prompt is used to automatically greet callers when the Play Greeting feature is activated by your Administrator.

Checking Your Oracle Contact On Demand Inbox

Inbox (on the Communication tab) section lists the channel-specific interactions still in progress that have been assigned to you within the chosen sub tab (Calls, Voicemail or Email). Oracle Contact On Demand considers these communications active until the following occurs:

- **Phone calls.** They are wrapped up when the call is terminated. The wrap up form automatically displays the status to Completed. To apply the Completed status to the activity, click Save in the wrap up screen. To leave the activity in the In Progress state, click Cancel. When the call is wrapped up, it is no longer displayed in the Inbox.
- **Voicemails.** You must manually select Wrap Up after you listen to a voicemail. The wrap up form automatically displays the status as Completed. When the voicemail is wrapped up, it is no longer displayed in the Inbox.
- **Emails.** You can reply, reassign, or discard email (junk mail, for example). When you reply to an email, a Wrap Up window automatically is displayed. This window allows the agent to include additional information in the Completed Email Activity.

After the email is reassigned, or after the system automatically reassigns an email because an agent did not respond quickly enough, the email no longer appears in the agent's Inbox.

NOTE: Email activities are not saved in Oracle CRM On Demand until they are replied to and wrapped up with a status of Completed. Your company administrator can also configure Oracle Contact On Demand to automatically wrap up an activity without a Wrap Up window displaying in Oracle Contact On Demand. For more information, see [Wrapping Up Communication Activities](#) (on page 302).

Making Yourself Available

For you to receive new call and voicemail interactions, your status must be Available. You can receive email interactions when your status is Available. Depending on how your administrator has set up your status, it might change to Available as soon as you sign in to the application. If not, you need to manually set your status to Available.

When your status is Available, you can:

- Receive one or many types of new customer communications assigned to you (phone calls, emails, voicemails). The type and number of communications depends on the settings your administrator configured.
- See data pertaining to the inbound interactions displayed in the Action bar.

To make yourself available for phone calls

- In the Communication Tools section in the Action bar, click Unavailable.

The Unavailable status changes to Available.

Handling Phone Calls

When you become available for work, you can start taking phone calls from customers. Depending on your company's routing, you will receive calls based on your skill set, workgroup, or other criteria.

You can determine the period during which the Communication Homepage Inbox displays the current and completed calls in your personal profile. For more information, see [Updating Your Personal Details](#) (on page 604).

In addition, the application searches for matching records for the phone call and displays the matching record. If no existing records—or multiple records—match the incoming phone call, the Call Detail window appears. For more information on this sequence, see [About Oracle Contact On Demand](#) (on page 286).

If you change your status to Unavailable, you can still be assigned emails. No other communications such as phone calls, voicemails can be assigned to you. You can make yourself unavailable while you do other work, such as completing or cleaning up existing messages. Making yourself unavailable prevents you from missing calls unnecessarily, for example, while you are doing other tasks. An alternative solution that prevents you from missing incoming calls is to run two browser sessions with the same user credentials: one with the Communications toolbar open, and the second with the Communications toolbar closed. Use the first browser for incoming calls, and the second browser for all other activities.

To take a phone call

- When a new communication is assigned to you, answer the phone.

If Oracle Contact On Demand is configured to display screen pops, it displays the matching record based on a search for the following data (in this specific order):

- Service Request
- Campaign
- Contact
- Lead
- Account

NOTE: Additional configuration tasks for Oracle Contact On Demand must be completed if you want the application to search for data entered by the caller in response to an Interactive Voice Response (IVR) prompt; that is, a service request number, contact home phone number, or campaign ID.

If you are not configured for screen pops, you can click the blinking Inbound Call alert in the Communication Toolbar to navigate directly to the Call Detail page.

When you accept the call, the call controls become active.

TIP: If a screen pop for an incoming call displays while you are editing a record, any unsaved data for this record is lost. A good practice is to run two browser sessions with the same user credentials: one with the Communications toolbar open, and the second with the Communications toolbar closed. Use the first browser for incoming calls, and the second browser for all other activities.

To hang up

- Hang up the receiver, or click Hangup in the Voice Controls section in the Action bar.

After the call ends, the Wrap Up form appears for you to track information about the call. Your Administrator may set a time-based wrap up, allowing you to complete work after the call. For more information on wrapping up activities, see [Wrapping Up Communication Activities](#) (on page 302).

To place a call on hold

- In the Voice Controls section in the Action bar, click Hold at any point during the call.

Placing a call on hold allows you to park the call and pause voice communication with the caller. You can see the status of the call (that is, On Hold) in the Action bar.

To resume voice communication

- Click the Hold button.

To transfer a call

- 1 In the Voice Controls section in the Action bar, click Transfer.
- 2 In the drop-down window, select the option you want.
- 3 In the Transfer window, do one of the following, according to your previous selection:

For this option	Follow these steps
Agent	<ol style="list-style-type: none">1. Select an agent. TIP: To find the agent in the list, use the Search for an Agent field. NOTE: A call transfer to an agent does not require that the agent be signed in to the application or be available for calls.2. Click one of the buttons:<ul style="list-style-type: none">■ Blind Transfer. Transfers the call to another agent, disconnecting you from the call.■ Announced Transfer. Transfers the call, allowing you to announce the call to the agent who answers. The customer does not hear the announcement.■ Conference. Transfers the call, keeping you and the customer on the line while another person joins the call. TIP: You can double-click the agent name to transfer the call as a blind transfer.3. If the agent does not answer, you can click Abandon Transfer in the Voice Controls section at any time. This puts the customer on hold and returns the control to you. To reconnect with the caller, click the Hold button.
Group	<p>Select the Skill Group from your company list of groups and click Transfer, or double-click the group name.</p> <p>A call transfer to a skill group does not require that any agents be signed in.</p> <p>TIP: To find the group in the list, use the Search for a Group field.</p>

For this option	Follow these steps
Phone	<p>4. Enter the telephone number in the available field.</p> <p>This might be a telephone within the company or outside of the company.</p> <p>5. Click Conference, Announced Transfer, or Blind Transfer to complete the transfer.</p>
Voicemail	Sends the call to the agent's voicemail.

- 1 Enter information in the Wrap Up form.

NOTE: When you transfer a call, the call between you and the caller ends, prompting the Wrap Up form to appear.

To reconnect with the caller

- Click the Abandon Transfer button and then click the Hold button.

NOTE: This option is available for announced transfers or conference transfers.

Disabling the Communications Toolbar in a Browser Session

If you are using multiple browser sessions in Oracle CRM On Demand to talk simultaneously to a customer and add details to a form, such as a Service Request, you can disable Communications Tools in one Oracle CRM On Demand browser session. This feature allows you to save the details that you are entering in the form. In the second Oracle CRM On Demand browser session, you can use Communications Tools to manage customer communications.

NOTE: The disabled Communication Tools section remains disabled in the browser session until you sign out, and then sign in again to Oracle CRM On Demand. It is not necessary to close the browser window.

To disable Communications Toolbar in browser session 1

- 1 From the Action bar, click the X button on the Communications Toolbar section title bar.

TIP: Move the pointer over the button to see a ToolTip that displays information about the button's functionality.

When the Disable Communications Toolbar button is clicked, a confirmation request appears.

- 2 Click OK to disable the Communications Toolbar.

NOTE: If you disable the Communications Toolbar, you cannot use the Discard, Wrapup, Reassign and Open Email buttons, or Oracle Contact On Demand attachments, for example, viewing Interaction History from a Call Detail page, from the browser session. You can sign in again to Oracle CRM On Demand to enable the Communications Toolbar.

Placing Calls

From Oracle Contact On Demand, you can place external calls to customers or internal calls to another agent or supervisor.

By default, each agent has two separate phone lines, allowing you to receive an inbound call on one line and make an outbound call on a second line. For example, your customer might need information that you cannot supply. You can place the customer on hold, click the second line to begin using it, click Dial, and call someone else for the information you need. When you receive the information, you can end the second call and return to your customer on the first line.

Placing an external call automatically creates an activity record within Oracle CRM On Demand for the call, unless you clear that option before dialing each call. Logging the outbound call activity saves you time tracking your daily activities, and allows managers to measure each agent's productivity.

To place an external call

- 1 In the Communication Tools section in the Action bar, click Dial.

NOTE: By default, the Log an Activity check box is selected.

- 2 Then you can do one of the following:

- Select a number from the Recently Dialed list, and click Call.

NOTE: These recently dialed numbers pertain to the current session. When you sign out, the list is cleared.

- Enter the phone number, and click Call.

- Click the Search Agents button, select the Agent from the list, and click Dial.

TIP: To find the agent in the list, use the Search for an Agent field.

- 3 Answer your phone.

Oracle Contact On Demand then calls the destination phone number you entered.

To place an external call using Click-to-Dial

- 1 Navigate to a contact's details on a Contact Details or a Contacts List page.

If the contact's number is displayed as a hyperlink, you can click on it to dial the number.

NOTE: System Administrators can customize your system and change fields and their characteristics. Click-to-Dial may not work with such fields.

- 2 Click the phone link you wish to dial.

A Dialer dialog box appears.

NOTE: The telephone number in this dialog box is read-only. To disable this dialog box, navigate to My Setup, Personal Profile, and then My Profile, and unselect the Display Click-to-Dial Pop-up check box. You need to log out and login again for this change to take effect.

- 3 Click the Call button to place the outbound call.

Oracle Contact On Demand then calls the destination phone number you clicked.

To place an internal call

An internal call can be placed to any agent or supervisor. Their status is displayed in the list of users along with their name and target telephone number (that is, current location). A call placed to an agent rings that agent's telephone, regardless of the agent being logged in or not.

Handling Callbacks (Web and Phone)

Oracle Contact On Demand provides Web callback and callback capabilities, which must be set up by the administrator:

- **Web Callbacks.** Customers access a form on the company Web site to schedule a callback.
- **Callbacks.** Customers request a callback through the phone menu when they contact the call center.

When a request for a callback is submitted through either the Web page or phone menu, the callback is routed to the best suited available agent. That agent sees a flashing alert, and the call buttons become activated.

To accept a callback

- Click Answer when you see the alert notification in your Action bar.

Accepting the callback passes the call to you. Your phone rings, and when you answer it, the call is made to the requesting party. If you accept a Web callback, the Web Callback dialog box displays information, which the caller entered in the Web callback form.

NOTE: For Web callbacks, the Oracle Contact On Demand detail page is not displayed. However, the Activity records are automatically linked to any matching records.

Handling Voicemail Messages

Voicemail messages can be either personal or ACD messages. ACD messages are voicemails left for your company call center. Those voicemail messages are routed according to the call flow set up by your administrator and are assigned to agents based on their skill and availability.

You can reassign a voicemail message to another agent, supervisor, or a skill group. When you reassign a voicemail, it goes through the routing again, according to the workflow your administrator set up. Reassigned voicemails are no longer owned by you.

When a voicemail message is in your queue, the Inbound Voicemail alert flashes in the Communication Tools section in the Action bar for a few seconds. The record also appears at the top of your Inbox on the Communications Homepage, within the Voicemail subtab.

You can determine for what timeframe the Communication Homepage Inbox displays current and completed voicemails in your personal profile. For more information, see [Updating Your Personal Details](#) (on page 604).

You can play a voicemail message at any time, and playing the message does not affect your availability to answer calls. However, your availability is affected if you choose to listen to the voicemail using the phone.

NOTE: Voicemail messages cannot be deleted.

To listen to a message (new or played)

1 In the Inbox, click the Subject link for the voicemail message.

2 On the Voicemail page, click the Listen to Vmail button.

This plays the voicemail through the local media player.

TIP: If you have problems listening to recorded messages, change the default media player on your machine.

To listen to a message on the phone (new or played)

1 In the Inbox, click the Subject link for the voicemail message.

2 On the Voicemail page, click the Listen to Vmail on Phone button.

The agent's phone rings and plays the voicemail through the phone.

To reassign the voicemail

1 On the Voicemail page, click Reassign.

2 Click Agent or Group in the window that appears.

3 In the Transfer window, select a group or agent.

If you click Agent, a dialog box opens with a list of all the agents and their respective statuses. The following list describes the statuses of the agents:

- **Available.** The agent has the status of Available in the Communication Tools bar.
- **On Break.** The agent has the status of Unavailable in the Communication Tools bar.
- **Busy.** The agent is working on another interaction and is unavailable.
- **Logout.** The agent is not logged in to the Communication Server. This information does not relate to the agent's status in Oracle CRM On Demand.
- **ACD Email.** The agent is currently processing an email.
- **Wrap Up.** The agent is currently processing a Wrap Up form.

4 Click Transfer.

Handling Emails

Emails are routed to agents based on skill, availability, or keyword. When an email has been routed to you, the Incoming Email alert flashes in the Communication Tools section of the Action bar. The record also appears at the top of your Inbox on the Communications Homepage, within the Email subtab.

You can determine the period during which the Communication Homepage Inbox displays the current and completed emails in your personal profile. For more information, see [Updating Your Personal Details](#).

Generally, you want to respond to all emails. However, when you receive email, such as junk mail, which does not warrant a reply, you can discard it. Discarding wraps up the email without a response and no completed Email Activity is created. However, you can choose to create an email activity for discarded emails if you want. You can save incomplete email replies by clicking **Save As Draft**. These emails are saved to the Drafts folder. You cannot edit discarded and sent emails.

Your administrator also configures the settings for the maximum number of emails you can receive. You can see that information by looking at the **Offline Messages** line in the **Statistics** window, shown as x/y . x is the number of messages currently assigned to you. y is your allowed limit.

NOTE: When an agent receives an email, the agent's status remains at **Available**.

To read a new email

To access your new email, you can do either of the following:

- Click the **Incoming Email** alert in the **Communication Tools** section in the **Action bar**.
This automatically opens the **Email** subtab in the **Communications Homepage**.
 - Navigate to the **Email** subtab on the **Communications** tab.
This displays a list of new email assigned to you.
- 1 Click the **Subject Link** of the email you want to review.
The email content is displayed in the **New Email Details** window.
 - 2 On the **Email Details** window you can do the following:
 - **Reassign.** Resends the email to the same workgroup so that it can be reassigned to another agent or group.
Enter information in the **Note** field if you want to provide background information for the next agent or group.
 - **Discard.** Removes the email from the **Inbox**.
Use this feature for unwanted emails. If you want to keep track of certain discarded emails, select the **Log an Activity** checkbox in the **Discard Email** dialog.
 - **Save as Draft.** Saves the email in the draft email list within my **Email** section.
 - **Reply.** On replying to an email, a wrap-up screen appears. Enter the appropriate wrap up details and click **Save**.

The activity is now recorded in the **Recently Completed Emails** section of your **Communication** home page. Also, if the email was related to any records you can access the email from the record's interaction history. Both the original email and the response are captured within the interaction history.

To read draft, sent and discarded emails

- 1 Click the **Email** subtab in the **Communications Homepage**.

- 2 In the My Emails section, locate the email you want to review from the drop-down menu:

- Draft Messages
- Sent Messages
- Discarded Messages

This displays a list of emails for the selected folder.

- 3 Click the Subject link for the email you want to review.

The email content is displayed in the Email Details section.

NOTE: The Outbound Email activity is saved as a separate activity record. If the Outbound Email activity is linked to a contact, account, and so on, the activity record also appears in the contact or account's related information section. Oracle CRM On Demand creates only completed Email Activities in Sent Messages.

To reassign the email

- 1 On the Email page, click Reassign.
- 2 Click Agent or Group in the window that appears.
- 3 In the Transfer window, select a group or agent.

If you click Agent, a dialog box opens with a list of all the agents and their respective statuses. The following list describes the statuses of the agents:

- **Available.** The agent has the status of Available in the Communication Tools bar.
- **On Break.** The agent has the status of Unavailable in the Communication Tools bar.
- **Busy.** The agent is working on another interaction and is unavailable.
- **Logout.** The agent is not logged in to the Communication Server. This information does not relate to the agent's status in Oracle CRM On Demand.
- **ACD Email.** The agent is currently processing an email.
- **Wrap Up.** The agent is currently processing a Wrap Up form.

- 4 Click Transfer.

Wrapping Up Communication Activities

Your administrator determines if the Wrap Up form in your Oracle Contact On Demand is enabled automatically or manually. By default, Wrap Up forms are obligatory, and only your administrator can enable or disable Wrap Up forms in Oracle Contact On Demand.

TIP: The Auto Wrap Up setting is available in the Company Profile section of Oracle CRM On Demand. Only administrators can enable or disable this setting. For more information on configuring the Auto Wrap Up

settings, see *Oracle Contact On Demand Administration Manager Guide* and *Oracle Contact Center Anywhere Administration Manager Guide*.

When you end any communication (calls, voicemails, emails), Oracle Contact On Demand automatically creates an activity and displays the Wrap Up form. You must complete the Wrap Up form to complete the communication activity.

If a Wrap Up form does not display, do the following:

- Check with your administrator that your Wrap Up form is enabled.
- Check if your browser has a pop-up blocker enabled.

CAUTION: Do not wrap up an activity while a call is still active, otherwise a second Wrap Up form is displayed when you hang up the phone. Do not leave multiple wrap up windows open, otherwise it is difficult to determine which Wrap Up form belongs to which call.

NOTE: Each individual activity opens one individual Wrap Up form. You can customize your Wrap Up forms in the Activity Application Customization page in Oracle CRM On Demand. For more information on customizing Wrap Up Layout forms, see [Customizing Static Page Layouts](#) (on page 1057). For more information on assigning customized Wrap Up forms to specific users, see [Adding Roles](#) (on page 1173).

If the Wrap Up form is displayed while you are editing a record, the data already entered for this record is not lost, because the open page you are editing does not refresh when Oracle Contact On Demand saves the data on the Wrap Up form.

In the Wrap Up form, you can summarize what occurred during the communication. You can also link other records to the activity, such as accounts and contacts in the Wrap Up form. Linking records creates a historical audit of all communications between your company and a contact or account. You can also track all communications required to resolve a service request or all communications generated by a specific campaign, which helps your company to measure overall campaign effectiveness.

The following table describes some fields in the Wrap Up form.

Field	Description
Key Task Information	
Owner	Alias of the record owner. Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects which records are included in reports you or your managers run, as well as visibility in managed lists.
Subject	Default is the Activity Subtype followed by the phone number or email address.
Priority	Priority for this activity, as determined by your company setup. Read-only field.
Origin	Phone number or email address from which the call is made or the email address sent. Read-only field.
Destination	Phone number that the agent dials or target email address for the email. Read-only field.

Field	Description
Status	Defaults to Completed in the Wrap Up form. If you save the information with a status of Completed, the activity appears in the Recently Completed Communications section on your Communications Homepage.
Type	Activity type as defined at your company. Read-only.
Activity Subtype	<p>Specific activity type. You cannot edit these values; only your company administrator can change or add values to the drop-down list.</p> <p>Default values are Inbound Call, Outbound Call, Inbound Transfer, Outbound Transfer, Missed Transfer, Inbound Email, Outbound Email, Forwarded Email, Reassigned Email, Email Response, Inbound Voicemail, Outbound Voicemail, Forwarded Voicemail, Reassigned Voicemail, Callback, and Web Callback.</p>
Resolution Code	<p>Short description of how this call is resolved.</p> <p>Default values are Bad Number, Busy, Call Back, Customer Update, Discarded Email, General Question, Literature Request, New Account, New Contact, New Lead, New Opportunity, New Service Request, No Answer, Not Interested, Outside Transfer, Other, Product Question, Reassigned to Agent, Reassigned to Group, Response Given, Scheduled Follow Up, Transferred to Agent, Transferred to Group, and Transferred to Voicemail.</p> <p>Your company administrator can change or add values to the drop-down list.</p>
Related Items	<p>Records linked to the activity. Oracle Contact On Demand automatically links records when the activity is created based on information captured by the application, such as origin, destination, and other caller entered digits.</p> <p>You can also create new records that are automatically linked to this activity or select existing ones to link. Click the Lookup icon next to the record type. On the Search page, select the existing record or click New, enter the required information on the Edit page, and save the record.</p>
Additional Information	
Modified By	Name of the person who creates or updates the record followed by the date and time it occurs. System-generated.
Description	Additional information about the call. Limit of 16,350 characters.

Using automatic Wrap Up forms

You have one minute to complete the Wrap Up form, however, this time can be modified by an administrator. If you exceed the time limit allowed to enter the information in the Wrap Up form, a timer alert displays. Click OK and continue entering information, then Save. No further timer alerts display after the first timer alert. If the Wrap Up form is opened automatically, the Cancel button is grayed out, and cannot be used. If you close the Wrap Up form window, information you entered, if any, is saved.

Using manual Wrap Up forms

If the Wrap Up form is opened manually, you can close the Wrap Up form without saving the details by selecting the Cancel button.

Reviewing Your Statistics

You can review statistics by clicking Statistics in the Communication Tools section in the Action bar. The statistics represent activity in the last 24 hours for you or your workgroup, as indicated in the following table. Statistics are reset to zero (0) at midnight, company time.

This label	Shows this information
Session	
Last Update	Last time statistics were updated (agent-specific)
Logged in for	Login duration time (agent-specific)
Talk Time	<p>Duration of the talk time for all the agent's phone interactions.</p> <p>Example:</p> <ul style="list-style-type: none"> ■ 4 calls <ul style="list-style-type: none"> ■ 1 ACD Call: 30 minutes talk time ■ 1 Outbound call: 10 minutes ■ 1 Inbound call: 14 minutes ■ 1 Web Callback call: 15 minutes ■ Talk time is 69 minutes
Time to Answer	<p>Average time to answer for all types of interactions for all the workgroups that the agent is assigned to.</p> <p>Example:</p> <ul style="list-style-type: none"> ■ Agent is member of workgroup 1, 2 and 3: <ul style="list-style-type: none"> ■ Average time to answer for workgroup 1: 2 minutes ■ Average time to answer for workgroup 2: 4 minutes ■ Average time to answer for workgroup 3: 6 minutes ■ Average Time to answer: 4 minutes
Offline Messages	Number of emails in your queue or the number of messages you are set up to receive (agent-specific)
Voice	Number of calls taken by the agent. This is agent specific and does not include the workgroup totals.
# Calls in queue	Number of calls in the queue for all the workgroups that the agent is assigned to

This label	Shows this information
Longest Wait	The longest time that a call has been in the queue. This period is calculated by including all the calls in all the workgroups that the agent is assigned to.
Current State	Indicates the state of voice calls, for example, Available, Unavailable, and so on.
Voicemail	Number of ACD voicemails taken by the agent.
# Vmails in Queue	Number of ACD voicemails in the queue for all the workgroups that the agent is assigned to.
Current State	Indicates the state of ACD voicemails, for example, Available, Unavailable, and so on.
Email	Number of ACD emails taken by the agent.
# Emails in Queue	Number of ACD emails in the queue for all the workgroups that the agent is assigned to.
Current State	For ACD emails (agent-specific), for example, Available, Unavailable, and so on.

Viewing Interaction Histories

Oracle Contact On Demand tracks what happens to each customer interaction in a separate file, called an interaction history. Similar to a log file, the interaction history includes such information as the agent, priority, and routing for the voicemail. Interaction histories are stored as attachments to the activity records.

To see the interaction history

- 1 Select the activity.
- 2 On the Detail page, scroll down to the Attachments sections.
- 3 Click View in the Interaction History row.
- 4 To see further details, click the specific link in the history.

For example, you can click this link to review the reply you sent to an email: [Saving the transcript of the email reply](#).

Monitoring Agents

Before you begin. To perform this procedure, you need to be set up as a Supervisor in Oracle Contact On Demand.

You can use the monitor feature as a coaching tool to help agents best deal with customer issues. When you monitor an agent, they do not know when you are listening to their communications.

To monitor an agent's call

- 1 In the Communication Tools section in the Action bar, navigate to Supervisor, then Monitor.
- 2 In the Monitor Agent window, select the Agent Name.
TIP: To find the agent in the list, use the Search for an Agent field.
- 3 Select the monitoring or recording control for the current call:
 - **Listen.** You can hear the conversation, but neither the customer nor agent can hear you.
 - **Whisper.** You can hear the conversation and can coach the agent. The customer cannot hear you.
 - **Take Over.** You take control of the phone call with the customer. This disconnects the agent from the call and the Wrap Up form appears on the agent's screen.
 - **Join.** You join the conversation. Both the agent and customer hear you.
 - **Record/Stop Recording.** You record the conversation. When you stop recording, the wav file is stored as an attachment to this activity in the interaction history.
 - **Log Out Agent.** You sign out the agent from the application. Use this option for signing out remote agents that have left their workstation. When you select this option, a message appears asking you if you want to disconnect the channel. Selecting Yes disconnects the phone call the agent was on.

To listen to an agent's recording

- 1 In the Communication Tools section in the Action bar, click Supervisor, and select Recordings.
This displays the recordings made by the supervisor while monitoring an agent.
NOTE: Recordings made by the agent are available in the Interaction History.
- 2 In the Recordings window, select the recording.
TIP: To find the recording in the list, complete the User, From and To fields and click Search. You can also use the calendar icons to complete the From and To fields.
- 3 Select the recording control for the current recording:
 - **Play.** You can play the selected recording.
 - **Close.** You stop the recording and close the Recordings window.**TIP:** If you have problems listening to recorded messages, change the default media player on your machine.

Communication Activities List Page (Oracle Contact On Demand)

The Activities List page for Oracle Contact On Demand shows the subset or list of customer interactions you selected in the Communication Homepage. From the Activities List Page, you can review multiple interactions at a glance. You can also select one to review or update.

How to view the Activities List page

- 1 Click the Calls, Voicemail, or Email tab.
- 2 In the Inbox section, click the Show Full List link.

The Activities List page displays a list of all customer interactions.

You can determine the period during which the Communication Homepage Inbox displays the current and completed activities in your personal profile. For more information, see [Updating Your Personal Details](#) (on page 604).

Using the drop-down menu, you can also switch to another list. The drop-down list contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the Communications Lists Section table in [Working with the Communication Homepage](#) (on page 289).

NOTE: Activities include Appointments, Tasks, and Communication Activities. You cannot delete Oracle Contact On Demand Activities from the Communications Tab, Calendar or Home pages.

The following table describes what you can do from the Activities List Page:

To do this	Follow these steps
Create a filtered list	Click the Manage Lists link in the title bar, and then click New List. This opens a wizard to guide you through the process.
Create a task record	Click New Task on the title bar. On the Task Edit page, enter the required information and save the record.
Find an activity	Click the Subject column header. Then click a letter in the alphabet bar. For activities beginning with numbers, click 0-9.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
View a different subset of activities	Click the drop-down list on the title bar and change the selection. The drop-down list contains all filtered lists available to you.
View activity details	Click the Subject for the activity you want to view. This opens the Detail page.
View all activities at your company	In the title bar, click the drop-down list and select an item.

Oracle Contact On Demand Toolbar

Oracle Contact On Demand adds two sections to the Action bar: Communication Tools and Voice Controls. This table describes the options you might see in these two areas, depending on your responsibilities.

Button	Description
Communication Tools	

Button	Description
Available/Unavailable	Allows you to change your work status to Available or Unavailable for accepting phone calls.
Dial	Allows you to place an internal call or outbound call.
Supervisor	Allows supervisors to monitor and record agent's calls and listen to Agent's recordings.
User Preference	Allows you to change the phone where you accept incoming calls as well as other settings.
Statistics	Tracks your session statistics. For more information, see Reviewing Your Statistics (on page 305).
Voice Controls	Specific to each of the two phone lines in use.
Answer	Accepts callbacks (used when working On Hook),
Decline	Declines a callback or declines a call routed to you.
Hangup	Ends an active call.
Hold	Places a call on hold, which allows you to make an outbound call to an external source. Click this button a second time to return to the call.
Transfer	Transfers an active call to another agent, group, or external source.
Record	Records the active call, which is saved as a wav file and can be played on your local media player.

Communication Activity Fields (Oracle Contact On Demand)

When you click Edit from the Call, Voicemail, or Email Detail pages, the Activity Edit page opens with the information extracted from the Wrap Up form for the activity.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information that you see on screen might differ from the standard information described in this table. Not all fields in the application are editable. If your company administrator customizes the Activity record type so that additional fields are displayed as required, then this customization prevents Oracle CRM On Demand creating Activity records for new interactions.

The following table provides additional information regarding some fields.

NOTE: All times are shown in number of seconds.

Field	Description
Key Activity Information	

Field	Description
Owner	See Owner in Wrapping Up Communication Activities (on page 302).
Subject	See Subject in Wrapping Up Communication Activities (on page 302).
Priority	See Priority in Wrapping Up Communication Activities (on page 302).
Origin	See Origin in Wrapping Up Communication Activities (on page 302).
Destination	See Destination in Wrapping Up Communication Activities (on page 302).
Status	See Status in Wrapping Up Communication Activities (on page 302).
Type	See Type in Wrapping Up Communication Activities (on page 302).
Activity Subtype	See Activity Subtype in Wrapping Up Communication Activities (on page 302).
Resolution Code	See Resolution Code in Wrapping Up Communication Activities (on page 302).
Key Statistics	
Queue Hold Time	Time in seconds that the interaction is in the queue before it is assigned to an agent.
Start Time	Time, date and timestamp the communication is assigned to the agent.
End Time	Time, date and timestamp that the communication is wrapped up.
Total Hold Time	Time in seconds that the caller is selecting options from the menu prompts combined with queue hold time.
Assigned Queue	Name of group that the interaction is routed to.
IVR Time	Time in seconds the customer is selecting options from the menu prompts. For emails, this shows 0.
Interaction Time	Time in seconds between start time and end time.
Wrap Up Time	Time in seconds the agent spends in wrap up (with the Wrap Up form open).
Handle Time	Sum of interaction time and wrap up time.
Queue Hold Time	Time in seconds that the caller is on hold after entering IVR information.
Related Items	See Related Items in Wrapping Up Communication Activities (on page 302).
Additional Information	
Modified By	See Modified By in Wrapping Up Communication Activities (on page 302).
Description	See Description in Wrapping Up Communication Activities (on page 302).

Call, Voicemail, and Email Detail Pages

Click a topic to see instructions for doing the following from the Call, Voicemail, or Email Detail page:

- [Viewing Interaction Histories](#) (on page 306)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Attaching Files and URLs to Records](#) (on page 94)

Oracle Contact On Demand administrators can create customizable Call, Voicemail, and Email detail pages. For more information on page layouts, see [Customizing Static Page Layouts](#) (on page 1057).

NOTE: You can create page layouts for calls, voicemails, and emails in Oracle Contact On Demand. Dynamic page layouts are not supported in Oracle Contact On Demand.

You can edit the layout of your Call, Voicemail and Email detail pages to display only the sections that you use regularly. Editing the page layouts also accelerates the speed at which your pages load and eliminates clutter.

To edit the layout of Calls, Voicemail and Email detail pages

- 1 Click a call, voicemail, or email to open the corresponding detail page.
- 2 Click the Edit Layout link located to the right of the detail page.
- 3 Using the arrows, move the sections (content) from the Available Related Information column to the Displayed Related Information column.
- 4 Click Save.

NOTE: You can also collapse and expand the sections you use most frequently or infrequently. If you rarely use a section, keep it collapsed. Collapsing sections improves the speed at which the page reloads. You can also use inline editing to edit frequently used fields. For more information on inline editing, see [Updating Record Details](#) (on page 60).

Related Topics

See the following topics for related information:

- [Communication Activity Fields \(Oracle Contact On Demand\)](#) (on page 309)
- [About Oracle Contact On Demand](#) (on page 286)

7

Partner Relationship Management and High Tech

Oracle CRM On Demand provides the following record types for Partner Relationship Management (PRM):

- **Partners.** Use these pages to manage information about the external companies or contacts at companies who sell or service products belonging to your company.
- **Partner Programs.** Use these pages to track the requirements and benefits for companies that are part of your company's partner programs.
- **Applications.** Use these pages to manage the applications from new or existing partners for partnership with the brand owner company.
- **Deal Registrations.** Use these pages to manage the deal registrations that allow partners to request exclusive rights to an opportunity from the brand owner company.
- **MDF Requests.** Use these pages to manage the market development funds (MDF) requests for monetary funds given by a manufacturer's sales or marketing department. MDF requests help a partner to sell its products or to market the manufacturer's brand.
- **SP Requests.** Use these pages to manage the special pricing (SP) requests from partners for a price adjustment to a product.
- **Funds.** Use these pages to manage fund requests, credits, and approvals.
- **Training and Certification (T&C).** Use these pages to create awareness among the partner community about the training courses and programs offered for the products and services of the brand owner company. T&C also helps to track the skills and competencies of the partner companies and their employees. The T&C record types are:
 - Courses
 - Exams
 - Certifications
 - Accreditations

Note: All of these record types are available only with Oracle CRM On Demand Partner Relationship Management Edition. The Funds record type is also available with Oracle CRM On Demand High Tech Edition.

Managing PRM and High Tech

For more information on managing and configuring Partner Relationship Management (PRM), see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*.

Partners

Use the Partner pages to track partner companies and their members, create partner accounts in Oracle CRM On Demand to support partner users, and set the appropriate levels of access to Oracle CRM On Demand and data visibility for each partner account.

About Partners

The Partner tab represents any external company that sells or services products belonging to the brand owner.

The Partners pages in Oracle CRM On Demand allow you to define the business information about the partner as well as the partnership information between the brand owner and the partner. Examples of partner profile information are company name, address, phone numbers, fax number, Web site, annual revenue, number of employees, market, industry, description of business, and so on.

About Partner Accounts

A *PRM partner account*, also known as a managed partner account, is a partner with users in Oracle CRM On Demand. A nonmanaged partner account has no users in Oracle CRM On Demand. A PRM partner account is present in both the Account tab and the Partner tab and has the following attributes:

- It is an account with the account type set to Partner.
- The managed partner flag value is set to Y.
- The partner organization status is set to Active.

For organizations that are both accounts to whom sales representatives sell and PRM Partners, you must create two records: an account record and a partner record.

The partner record type is a subclass of the account record type, therefore, custom fields that are added to the account record type are also available for the partner record type. However, the reverse is not true: custom fields added to the partner record type are not available for the account record type.

In general, keep partner-specific attributes in the Partners tab, and keep account-specific attributes that are not related to the partnership in the Accounts tab. However, sometimes you might want to have a partner-specific attribute available on the Accounts tab. In this case, you can add custom attributes to the account record type. These attributes become part of the Partner record type automatically.

When you view the partner account from the Accounts tab, you can see the Account Type field, and it is set to Partner. When you view a partner account from the Partners tab, the Account Type field is not displayed, because the only value that a partner account can have is Partner.

NOTE: While the partner organization status is set to Active, the account type of a partner account must be set to Partner.

Working with the Partners Homepage

The Partners Homepage is the starting point for managing partners.

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

Creating a Partner Account

You can create a partner account by clicking the New button in the Recently Modified Partners section. For more information on creating partners, see [Creating Records](#) (on page 38) and [Partner Fields](#) (on page 319).

TIP: You can indicate partner hierarchies, such as a company that is a subsidiary of another company by selecting parent accounts. For more information about partner hierarchies, see [Specifying Parent Accounts](#) (on page 184).

Working with Partner Lists

The Partner Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for partners.

Partner List	Description
All Partners	Filters all partners to which you have visibility, regardless of owner.
My Partners	Partners with your name in the Owner field.
Recently Created Partners	All partners, sorted by the created date.
Recently Modified Partners	All partners, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Partners

The Recently Modified Partners section shows the partners that you modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Partners Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Partners Homepage:

- All Active Partners

- All Inactive Partners
- Recently Created Partners
- Recently Modified Partners
- One or more report sections (your company administrator can make report sections available on your Partners Homepage)

To add sections to your Partners Homepage

- 1 On the Partners Homepage, click Edit Layout.
- 2 On the Partners Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

Managing Partner Accounts

To manage partner accounts, do the following tasks:

- [Activating and Inactivating Partner Accounts](#) (on page 317)
- [Searching For Partner Accounts](#) (on page 318)
- [Deleting Partner Accounts](#) (on page 318)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Tracking Partners and Competitors of Accounts](#) (on page 185)
- [Tracking Relationships Between Accounts](#) (on page 187)
- [Adding Notes](#) (on page 87)
- [Attaching Files and URLs to Records](#) (on page 94)

NOTE: When you create a partner account and set that account to Active status, a book is automatically created with the name <Partner Name> Partner Book. When you create a partner account and define the partner organization for that partner account, that partner account is added to the corresponding book. When a partner account is inactivated, the partner account is inactivated on the corresponding book. If the user's partner organization is changed, the partner account is removed from the book associated to the old partner organization and added to the correct partner book for the new partner organization relationship.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Activating and Inactivating Partner Accounts

If a partnership has been suspended or terminated, you can deactivate that partner account. By deactivating the partner account, you can allow it to remain in Oracle CRM On Demand to be activated again later.

To activate or deactivate a partner account

- 1 Navigate to the Partner Edit page.
- 2 In the Partner Organization Status list, select Active to activate the partner account, or select Inactive to deactivate the partner account.
- 3 Click Save.

NOTE: Deactivating a partner account allows you to change the Account Type value from the Accounts tab, or delete the account from the Accounts tab. If an account is active, you can neither delete it nor change its Account Type value from the Accounts tab.

Converting Accounts to Partner Accounts

In Oracle CRM On Demand you can convert accounts to partner accounts.

Before you begin.

Your company administrator must have added the Managed Partner check box to the detail page. If the Managed Partner check box is not displayed on the detail page, click the Edit Layout link, and add the check box to the page layout in the Key Account Information section of the Account Detail page or contact your company administrator.

To convert an account to a partner account

- 1 On the Account List, select the account that you want to convert to a partner account.
- 2 On the Account Detail page, click Edit.
- 3 On the Edit Account page, change the account type to Partner.
- 4 Select the Managed Partner check box, and then click Save.

NOTE: When you complete this task, the name of the Owner field automatically changes to the name of the user performing the conversion, and the new partner is added to the owner's partner team.

To ensure that a partner account cannot revert to a regular account

- 1** Navigate to the Partner List on the Partner Tab, and select the partner account.
- 2** On the Partner Detail page, click Edit.
- 3** On the Edit Partner page, change the status of the partner organization to Active.
After you set the status to Active, the partner account cannot be changed to a regular account.

Searching for Partner Accounts

You can search for partner accounts by using the Advanced Search functionality in the action bar. You must specify the following search criteria:

- Field is set to Account Type
- Condition is set to Equal to
- Filter Value is set to Partner

To search for PRM partner accounts (managed partner accounts), you must specify the search criteria in the preceding list, and you must set the following search criteria:

- The field is set to Managed Partner Flag.
- The condition is set to Equal to.
- The filter value is set to Y.

For more information on searching for records, see: [Finding Records](#) (on page 41).

Deleting Partner Accounts

Because partner accounts can also be used as accounts, partner accounts might be associated with opportunities as well as with other records. Deleting a partner account might generate errors because of these associations.

Because accounts can also be used as partner accounts, deleting an account with an account type of Partner from the Accounts tab might also generate errors. As a result, you cannot delete partner accounts from the Partners tab. You can only deactivate partner accounts. If the account has no other use, and you want to delete it, it is possible to delete the inactive partner account from the Accounts tab.

When deleting an account that is of type partner from the Accounts tab, Oracle CRM On Demand checks to ensure the partner organization status is Inactive, which prevents accidental deletion of an active partner record. For information about deleting and restoring records, see [Deleting and Restoring Records](#) (on page 100).

Partner Fields

Use the Partner Edit page to add a partner or update details for an existing partner. The Partner Edit page shows the complete set of fields for a partner.

TIP: You can also edit partners on the Partner List page and the Partner Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Partner Information	
Partner Name	The name of the partner. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on.
Primary Partner Type	Select the partner type you want to use as the primary one for this partner account.
Location	The type of facility operated by the partner at this site, such as Headquarters.
Partner Organization Status	Indicates whether the partner account is active or inactive.
Parent Account	The name of the company that the partner is a subsidiary of.
Main Phone #	The primary phone number used to reach the partner.
Main Fax #	The primary fax number for the partner.
Web Site	URL address for the partner.
Price List	The price list to which the partner account is associated. Typically this price list is the one that stores the partner's purchase cost.
Additional Information	
Billing and Shipping Addresses	Selecting a country determines the labels for the remaining address fields, according to that country's address convention. The screen might refresh to display the field names.
Owner	Alias of the record owner. Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access. In order to reassign ownership of a partner record, you must have Read/Edit/Delete access to the partner record. The value in the Owner field affects which records are included in the reports that you or your managers run.
Channel Account	The channel account manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel account managers

Field	Description
Manager	serve as the primary contact for the partner.
Number of Active Users	This is a calculated field that determines the current number of active users in Oracle CRM On Demand for the partner.
Maximum Number of Users	The maximum number of users that a partner organization can have. A partner cannot have more users than the number defined in this field.
Remaining Number of Users Available	This is a calculated field that equals the difference between the Maximum Number of Users field and the Current Number of Active Users field. When the value of this field is 0 (zero), then you cannot add any more active users to Oracle CRM On Demand.
Description	Additional information about the partner. This field has a limit of 2,000 characters.

Partner Programs

Use the Partner Program pages to do the following:

- Manage different types and levels of partner programs.
- Specify different types of partners.
- Administer the partner program memberships.

A *partner program* describes the requirements and benefits for the partner when the partner is a member of the partner program. Partner programs are designed to recruit partners by the company that owns the brand.

Working with the Partner Programs Homepage

The Partner Programs Homepage is the starting point for managing partner programs.

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

Creating a Partner Program

You can create a partner program by clicking the New button in the Recently Modified Partner Programs section. For more information, see [Creating Partner Programs](#) (on page 323) and [Partner Program Fields](#) (on page 326).

Working with Partner Program Lists

The Partner Program Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for partner programs.

Partner Program List	Description
Recently Created Partner Programs	Filters all partner programs, sorted by the created date.
Recently Modified Partner Programs	Filters all partner programs, sorted by the modified date.
All Partner Programs	This list is not filtered. It displays all partner programs to which you have visibility, regardless of who owns the partner program.
My Partner Programs	Filters partner programs with your name in the Owner field.
My Recently Created Partner Programs	Filters partner programs with your name in the Owner field, sorted by the created date.
My Recently Modified Partner Programs	Filters partner programs with your name in the Owner field, sorted by the modified date.
All Inactive Partner Programs	Filters all partner programs with a status of Inactive.
All Active Partner Programs	Filters all partner programs with a status of Active.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Partner Programs

The Recently Modified Partner Programs section shows the partner programs that you modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Partner Programs Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Partner Programs Homepage:

- All Active Partner Programs
- All Inactive Partner Programs
- Recently Created Partner Programs

- Recently Modified Partner Programs
- My Recently Created Partner Programs
- My Recently Modified Partner Programs
- One or more report sections (your company administrator can make report sections available on your Partner Programs Homepage)

To add sections to your Partner Programs Homepage

- 1** On the Partner Programs Homepage, click Edit Layout.
- 2** On the Partner Programs Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
- 3** Click Save.

Managing Partner Programs

To manage partner programs, do the following tasks:

- [Creating Partner Programs](#) (on page 323)
- [Managing Partner Program Memberships](#) (on page 323)
- [Deleting Partner Programs](#) (on page 325)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Working with Attachments](#) (on page 91)
- [Tracking Partners and Competitors of Accounts](#) (on page 185)
- [Tracking Relationships Between Accounts](#) (on page 187)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Partner Programs

From Oracle CRM On Demand, you create a partner program by entering information in a form. You can access this form from different areas within Oracle CRM On Demand, depending on what you are working on and what tasks you want to do.

To create a partner program

- 1 From the Partner Program List page, click New Partner Program.
The Partner Program Edit page appears.
- 2 In the Partner Program Name field, type a name for the partner program you are creating.
TIP: Each partner program name must be unique.
- 3 In the Status field, select the appropriate status for the partner program.
- 4 Update the rest of the fields on the Partner Program Edit page as needed.
For information on each field, see [Partner Program Fields](#) (on page 326).
- 5 Save the partner program.

Managing Partner Program Memberships

You can use the Program Membership New and Edit pages to perform the following administrative tasks:

- [Creating Partner Program Memberships](#) (on page 323)
- [Changing Partner Program Membership Status](#) (on page 324)
- [Deleting Partner Program Memberships](#) (on page 324)
- [Attaching Files and URLs to Records](#) (on page 94)

Creating Partner Program Memberships

After a partner's application for membership of a partner program has been approved, the partner becomes a member of the partner program.

To create partner program memberships

- 1 On the Partner Program Details page for the selected partner program, click New in the Program Memberships bar.
The Program Membership New page appears.
- 2 In the Partner Name field, select the name of the partner that you want to add to the partner program.
- 3 Complete the other fields on the Partner Membership New page as needed.
For more information on these fields, see [Program Membership Fields](#) (on page 324).

NOTE: The state of the Active check box and value for the Status field must be in synchronization with each other. For example, if the membership status is set to Current, then you must select the Active check box.

- 4 Click Save.

Changing Partner Program Membership Status

When a partner has been approved to join a partner program, and you create a new membership record for this partner program, the default status of this membership record is Current.

You can change the status of the partner program membership to one of the following values:

- Expired
- Terminated

NOTE: The state of the Active check box and value for the Status field must be in synchronization with each other. For example, if the membership status is set to Expired or Terminated, then you must deselect the Active check box.

To change the partner program membership status

- 1 On the Partner Program Details page, click the Edit link of the partner program membership for which you want to change status.
- 2 On the Program Membership edit page, select the appropriate value from the Status drop-down.
- 3 Click Save.

Deleting Partner Program Memberships

If you created the program membership by mistake or you want to delete it, you can do so on the Partner Program Details page.

NOTE: You cannot delete a partner program membership if the status value for the membership is set to Current.

To delete a partner program membership

- 1 In the Program Memberships section of the Partner Program Details page, click Delete for the partner program membership that you want to remove.

A message box appears, asking if you are sure you want to delete the selected membership.

- 2 Click OK.

The selected membership is deleted.

Program Membership Fields

Use the Program Membership New and Edit pages to add a partner program membership or update details for an existing partner program membership. You can also use the Program Membership Edit page to create new

partner program memberships. The Partner Program Edit page shows the complete set of fields for a partner program.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding the fields on the Program Membership pages.

Field	Description
Key Program Membership Information	
Partner Program	The partner program to which you are adding a member.
Partner Type	The type of partner (for example, reseller, solution partner, distributor, and so on) for which this partner program is created.
Partner Name	The name of the partner you are adding to the partner program.
Program Level	The Program Level at which this partner joined the program.
Active	Indicate whether the partner program membership is Active.
ID#	The membership ID number. Oracle CRM On Demand assigns the ID.
Status	The status of the membership. The valid values are: Current, Terminated, Expired, and Renewed.
Begin Date	The date on which the partner program membership starts. This field displays the current date and time by default. You can use the calendar controls to change this date.
End Date	The date on which the partner program membership is scheduled to be completed. You can use the calendar controls to change this date.

Deleting Partner Programs

You can delete a partner program from the Partner Program Details page.

NOTE: You cannot delete a partner program if the status is set to Active.

To delete a partner program

- 1 On the Partner Program Details page, click Delete for the partner program you want to delete.
A message box appears, asking if you are sure that you want to delete the selected partner program.
- 2 Click OK.
The partner program is deleted.

Partner Program Fields

Use the Partner Program Edit page to add a partner program or update details for an existing partner program. You can also use this page to create new partner program memberships. This page shows the complete set of fields for a partner program.

TIP: You can also edit partners on the [Partner Program List](#) page and the [Partner Program Detail](#) page. For more information, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Administrators can also grant a partner access to these detail fields, so the partner can update the information.

The following table provides additional information regarding some fields.

Field	Description
Key Partner Program Information	
Partner Program Name	The name of the partner program. To avoid duplicate records, make sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on.
Status	Indicates whether the partner program is Active, Inactive, or In Progress.
Begin Date	The date on which the partner program starts. This field displays the current date and time by default. You can use the calendar controls to change this date.
End Date	The date on which the partner program is scheduled to be completed. You can use the calendar controls to change this date.
Partner Type	Determines the type of partner (for example, reseller, solution partner, distributor, and so on) for which this partner program is created.
Program Type	Determines the type of program you are creating, for example, deal registration.
MDF Allowed	Allows MDF (market development funds). Market development funds are monetary funds given by a manufacturer's sales or marketing department to help a partner sell its products or to market the manufacturer's brand. If you select MDF Allowed, any partner who is a member of this partner program is entitled to market development funds.
Special Pricing Allowed	Allows special pricing authorization. Special pricing authorization allows partners to request a special price for a product or group of products being sold. This price is usually requested so the partner can stay competitive or make a specific margin. If you select Special Pricing Allowed, any partner who is a member of this partner program is entitled to special pricing.

Field	Description
Deal Registration Allowed	If you select Deal Registration Allowed, any partner who is a member of this partner program is entitled to deal registration.
Description	Additional information about the partner program. This field has a limit of 2,000 characters.
Additional Information	
Owner Full Name	<p>The name of the partner program owner. Generally, the owner can update the partner program, or delete the partner program. However, access levels can be adjusted to restrict or expand a user's access. In order to reassign ownership of a partner program, you must have Read/Edit/Delete access to the partner program.</p> <p>The value in the Owner field affects which records are included in the reports that you or your managers run.</p>

Applications

An *application* is the means by which a new or existing partner applies for a partnership with the brand owner. The brand owner then reviews, approves, or rejects the application. You can populate applications with data from the brand owner's portal. A partner application allows the brand owner to efficiently review, reject, and approve applications. The brand owner can also refer to application information while working in Oracle CRM On Demand.

Working with the Applications Homepage

The Applications Homepage is the starting point for managing partner applications.

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

Creating an Application

You can create an application by clicking the New button in the Recently Modified Applications section. For more information, see [Creating Records](#) (on page 38) and [Applications Fields](#) (on page 333).

You can use Web services to populate applications from a partner portal. You can also use the import tool in Oracle CRM On Demand to import applications. For more information on importing applications, see [Importing Applications](#) (on page 333).

Working with Applications Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for applications.

Applications List	Description
All Applications	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter applications.
All Submitted Applications	Filters applications with the status of Submitted.
All Rejected Applications	Filters applications with the status of Rejected.
All Approved Applications	Filters applications with the status of Approved.
My Applications	Filters applications with your name in the Owner field.
All Recently Created Applications	Filters applications sorted by the date on which the application was created.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing My Recently Modified Applications Section

The My Recently Modified Applications section shows the applications that you own and that were recently modified. To expand the list, click the Show Full List link.

Adding Sections to Your Applications Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Applications Homepage:

- Application Lists
- All Applications
- All Rejected Applications
- All Approved Applications
- All Submitted Applications
- My Applications
- All Recently Created Applications

- One or more report sections (Your company administrator can make report sections, such as the Applications Analytics Report, available on your Applications Homepage.)

To add sections to your Applications Homepage

- 1 On the Applications Homepage, click Edit Layout.
- 2 On the Applications Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

Managing Applications

To manage applications, perform the following tasks:

- [Creating Applications](#) (on page 330)
- [Submitting Applications for Approval](#) (on page 330)
- [Reviewing Applications](#) (on page 331)
- [Rejecting Applications](#) (on page 331)
- [Recalling Applications](#) (on page 332)
- [Canceling Applications](#) (on page 332)
- [Deleting Applications](#) (on page 333)
- [Importing Applications](#) (on page 333)
- [Applications Fields](#) (on page 333)

For additional procedures that are common to all records, see [Working with Records](#) (on page 38).

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Working with Attachments](#) (on page 91)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Applications

From Oracle CRM On Demand, you create an application by entering information in a form.

To create an application

- 1 From the Application List page, click New.
- 2 In the Application Name field, enter a name for the application that you are creating.
TIP: Each application name must be unique.
- 3 In the Application Submitted By section, enter your first and last name in the appropriate fields.
- 4 Update the rest of the fields on the Application Edit page as needed.
For information on each field, see [Applications Fields](#) (on page 333).
- 5 Save the application.

Submitting Applications for Approval

A partner application allows the brand owner to review, reject, and approve applications efficiently.

Before you begin. The application must first be created. For more information on creating applications, see [Creating Applications](#) (on page 330). A workflow rule must be created that assigns an appropriate user as the approver for applications. For more information on creating workflow rules, see [Creating Workflow Rules](#) (on page 1221).

To submit an application for approval

- 1 Select the application for which you want to submit an application from the All Applications section on the Applications Homepage.
For information on selecting applications, see [Finding Records](#) (on page 41).
- 2 On the Applications Detail page, click the Edit button.
- 3 On the Applications Edit page, select Submitted from the Submission Status field. Then click Save.
After the Submission Status field has been changed to Submitted, and the record has been saved the following occurs:
 - The approval status is set to Pending Approval.
 - The submission date is automatically set to the current timestamp.
 - The approval of the application begins. A workflow rule sets the application's Approver field to the appropriate user.
 - The approver is added to the team of the application if the approver is not already present.
 - A workflow rule sends email notifications if it has been configured to send emails.

Reviewing Applications

A brand owner must recruit suitable partners for the partner programs. When prospective partners apply for partnership, or existing partners apply for additional program memberships with the brand owner, Oracle CRM On Demand allows the brand owner to review the applications. The brand owner can then approve or reject the applications.

To review an application

- 1 From the Applications List page, click the name of the application that you want to review.
- 2 On the Applications Detail page, review the appropriate fields.
- 3 If you want to make changes, such as approving or rejecting an application, click Edit.
- 4 On the Application Edit page, make the necessary changes to the application. Then click Save.

Approving Applications

Brand owners can use Oracle CRM On Demand to approve partner applications that they consider to be acceptable.

NOTE: You can approve only partner applications for which you are designated the current approver.

To approve a partner application

- 1 From the Applications List page, click the name of the partner application that you want to approve.
- 2 On the Application Details page, click Edit.
- 3 Change the Approval Status to Approved, then click Save.

Rejecting Applications

As an application goes through the approval chain, an approver can reject the application.

Before you begin. The application must have the submission status of Submitted.

To reject an application

- 1 Select the application that you want to reject from the All Applications section on the Applications Homepage.
For information on selecting applications, see [Finding Records](#) (on page 41).
- 2 On the Application Detail page, click the Edit button.

- 3 On the Application Edit page, select Rejected from the Approval Status field. Then click Save.

When you change the approval status to Rejected and click Save, the following occurs:

- The submission status of the registration remains in the Submitted state.
- The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.

Note: If the application has not been approved, no date appears in the Approved Date field.

- A workflow rule creates a new task record to track the return action of the approver if the workflow rule has been configured.
- A workflow rule sends appropriate email notifications if it has been configured to send emails.

Recalling Applications

As an application goes through the approval chain, a partner can recall the application.

Before you begin. The application must have the submission status of Submitted and the approval status of Pending Approval.

To recall applications

- 1 Select the application that you want to recall from the All Applications section on the Applications Homepage.

For information on selecting applications, see [Finding Records](#) (on page 41).

- 2 On the Application Detail page, click the Edit button.
- 3 On the Application Edit page, select Recalled from the Submission Status field. Then click Save.

When you change the submission status to Recalled, the following occurs:

- The approver status is reset to blank.
- A workflow rule creates a new task to track the approval action if the workflow rule has been configured.
- A workflow rule sends appropriate email notifications if it has been configured to send emails.

Canceling Applications

As an application goes through the approval chain, an approver can cancel the application.

Before you begin. The application must have an approval status of Approved.

To cancel an application

- 1 Select the application that you want to cancel from the All Applications section on the Applications Homepage.

For information on selecting applications, see [Finding Records](#) (on page 41).

- 2 On the Applications Detail page, click the Edit button.
- 3 On the Applications Edit page, select Cancelled from the Approval Status field. Then click Save.

Deleting Applications

You can delete an application from the Application Details page.

To delete an application

- 1 On the Application Details page, click Delete.
A message box appears, asking if you are sure that you want to delete the application.
- 2 Click OK.
The application is deleted.

Importing Applications

In most cases, brand owners choose to populate initial partner applications from another source. Brand owners can populate partner applications by using the Import tool in Oracle CRM On Demand, or they can use Web services to load application data from a partner portal. For more information on importing data using Oracle CRM On Demand, see [Importing Your Data](#) (on page 1448).

Applications Fields

Use the Applications Edit page to add an application or update details for an existing application. The Applications Edit page shows the complete set of fields for an application.

TIP: You can also edit applications on the Applications List page and the Applications Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Company Profile	
Name	The name of the company. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on.

Field	Description
Location	The location of the company.
Main Phone #	The primary phone number of the company.
Main Fax #	The primary fax number for the company.
Web Site	URL address for the company.
Number of Employees	The total number of employees in the company.
Annual Revenue	The total annual revenue for the company.
Industry	The industry in which the company competes.
Country	The country portion of the company's address.
Address 1	Additional information for the company's address.
Address 2	Additional information for the company's address.
City	The city portion of the company's address.
Province	The state or province portion of the company's address.
Post Code	The postal code portion of the company's address.
Application Submitted by	
First Name	The submitter's first name.
Last Name	The submitter's last name.
Work Phone #	The submitter's work phone number.
Cellular Phone #	The submitter's cellular phone number.
Work Fax #	The submitter's work fax number.
Email Address	The submitter's email address.
Job Title	The submitter's job title.
Submission Status	The current submission status of the application. The values are: Not Submitted, Submitted, or Recalled.
Current Approver	The name of the person who has the authority to approve the application.
Country	The country portion of the submitter's address.
Address 1	Additional information for the submitter's address.
Address 2	Additional information for the submitter's address.
City	The city portion of the submitter's address.
Province	The state or province portion of the submitter's address.

Field	Description
Post Code	The postal code of the submitter's address.
Partnership Information	
Approval Status	The current approval status for the application. The values are: Pending Approval, Approved, Rejected, or Cancelled.
Submitted Date	The date on which the application was submitted.
Approved Date	The date on which the application was approved.
Processed By: Name	The name of the person who has reviewed and either accepted or rejected this application.
Reject Reason	The reason why the application was rejected. The values are: Duplicate, Incorrect Information, Insufficient Information, or Other.
Partner Program	The name of the partner program associated with the application.
Program Level	The level of the partner program associated with the application.
Partner Type	The type of partner for which the application is being submitted.
Expected Partnership Benefits	The expected benefits from this partnership. It is a text field with a limit of 500 characters.
Existing Partnerships	This field lists any existing partnerships. It is a text field with a limit of 300 characters.
Additional Information	
Partner	The partner who is associated with this application.
Source	The source from where this application comes, for example, Web site, direct mail, email, and so on.
Campaign	The campaign that resulted in this partner application. This campaign is associated with this application.
Application ID	The unique identification (ID) number for this application.

Deal Registrations

Deal registration is a process by which partners request exclusive rights to an opportunity from the brand owner. It provides partners with the means to inform the vendor about a potential opportunity, and then partners receive priority for that opportunity. Deal registrations are less speculative than leads but more speculative than opportunities, so they are considered to exist between leads and opportunities.

In most cases, a partner requests registration of a lead or opportunity that the partner discovered. However, the partner can also request registration of an opportunity that was previously offered to the partner by the brand owner.

Deal registrations help mitigate channel conflict, where partners have to compete against one another or the vendor's internal sales department for the same opportunity. Deal registrations are also beneficial in the following ways:

- They enhance the brand owner's visibility of the opportunity pipeline of the partners.
- They increase the brand owner's ability to upsell or cross-sell or both.

When registering a deal, the partner might not have enough information about the opportunity. For example, the partner might not know the exact nature of the products that the prospect intends to purchase. The partner might have only a vague idea of the prospect's interest, for example, *high-end servers* rather than a definitive picture of the prospect's shopping list. Therefore, when registering deals, partners can provide as little or as much information as they want.

Working with the Deal Registration Homepage

The Deal Registration Homepage is the starting point for managing deal registrations.

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

Creating a Deal Registration

You can create a deal registration by clicking the New button in the Recently Viewed Registrations Waiting for My Approval section. For more information, see [Creating Records](#) (on page 38) and [Deal Registration Fields](#) (on page 348).

Working with Deal Registration Lists

The Deal Registration Lists section shows a number of filtered lists. Oracle CRM On Demand has a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following are some of the sections that can be displayed on your Deal Registration Homepage.

Deal Registration Lists	Description
All Deal Registrations	This list displays all records to which you have visibility, regardless of who owns the record. It does not filter deal registrations.
Recently Modified Deal Registrations	Filters all deal registrations, sorted by the modified

Deal Registration Lists	Description
	date.
Recently Created Deal Registrations	Filters all deal registrations, sorted by the created date.
Recently Viewed Deal Registrations	Filters all deal registrations, sorted by the order of the most recently viewed.
Deal Registrations expiring in the Next 30 Days	All approved deal registrations with an expiration date that falls within the next 30 calendar days from the present date.
Deal Registrations Waiting for My Approval	All deal registrations with the approval status of Pending Approval for which you are the current approver.
Deal Registrations with no Activity in the Past 30 Days	All approved deal registrations that have seen no activity on the associated opportunity within the past 30 calendar days from the present date.
Active Deal Registrations	All deal registrations with an approval status of Approved.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Deal Registrations Waiting for My Approval

The Deal Registrations Waiting for My Approval section shows all deal registrations for which you are the current approver, but have not yet approved.

Other Sections

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Deal Registration Homepage:

- Approved Deal Registrations
- Deal Registrations Expiring in the Next 30 Days
- Deal Registrations with no Activity in the Past 30 Days
- Recently Created Deal Registrations
- Recently Modified Deal Registrations
- Active Deal Registrations

- One or more report sections [Your company administrator can make report sections, such as the Approved Registrations by Deal Size (Bar chart), Approved Registrations by Age (Bar chart), Registrations by Status (Pie chart), Registrations resulting in Win (By Period) (Bar chart), or Number (#) of registrations (By Period) (Bar chart).]

Adding Sections to Your Deal Registration Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Deal Registration Homepage, depending on which sections your company administrator has made available for display on your Deal Registration Homepage.

To add sections to your Deal Registration Homepage

- 1 On the Deal Registration Homepage, click Edit Layout.
- 2 On the Deal Registration Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page. Then click Save.

Managing Deal Registrations

To manage deal registrations, perform the following tasks:

- [Creating Deal Registrations](#) (on page 339)
- [Submitting Deal Registrations for Approval](#) (on page 340)
- [Approving Deal Registrations](#) (on page 340)
- [Returning Deal Registrations](#) (on page 341)
- [Rejecting Deal Registrations](#) (on page 342)
- [Resubmitting Deal Registrations](#) (on page 342)
- [Canceling Deal Registrations](#) (on page 343)
- [Ending the Period for Deal Registrations](#) (on page 343)
- [Updating Deal Registrations](#) (on page 344)
- [Linking Products to Deal Registrations](#) (on page 344)
- [Calculating the Deal Size](#) (on page 344)
- [Associating Deal Registrations with Opportunities](#) (on page 345)
- [Converting Deal Registrations to Accounts, Contacts, or Opportunities](#) (on page 345)
- [Access Profile and Role Settings for Converting Deal Registrations](#) (on page 346)
- [Deal Registration Fields](#) (on page 348)

Creating Deal Registrations

From within Oracle CRM On Demand, partners create a deal registration by entering information in a form. The partner can access this form from different areas within the application, depending on what the partner is working on and what the partner wants to do. This topic describes one method of creating a deal registration from the Deal Registrations tab. Partners can also create deal registrations using other methods, see [Creating Records](#) (on page 38).

When a partner creates a deal registration, the partner can either make it independent or associate it with an opportunity. The partner creates an independent deal registration (stand-alone registration) when the partner believes he or she has discovered a potential new business opportunity and wants to register it with the brand owner. However, the brand owner might not consider it an opportunity until it has been verified by one or more persons in the organization.

In this case, when the partner believes he or she has discovered an opportunity, and the brand owner contends that it is not an opportunity until it has been verified and confirmed, the solution is for the partner to create a deal registration. The deal registration contains both opportunity as well as registration information. At some point, the partner submits the registration for approval and, if it is appropriate, the brand owner approves it. Prior to giving final approval for the deal registration, the brand owner associates it with an opportunity.

To create a deal registration

- 1 From the Deal Registration List page, click New.
 - 2 In the Deal Registration Detail form, enter the required information.
 - a If the deal registration is for an existing opportunity, search for and select the appropriate opportunity in the Associated Opportunity field. The Associated Opportunity field should display only those opportunities to which you have visibility. The customer field is automatically populated with the name of the customer associated with the selected opportunity.
 - b If the deal registration is for a new opportunity (or for an opportunity to which you do not have visibility), select the New Opportunity check box, and enter the following information in the Opportunity Information section.
 - Currency
 - Deal size
 - Close date
 - Product interest
 - Next step
 - c If the deal registration is for a new opportunity, it might be for an existing customer or a new customer. If the deal registration is for an existing customer, search for and select the customer from the Associated Customer field. If the deal registration is for a new customer, select the New Customer check box, and complete the fields in the New Company information section.
- For more information about Deal Registration fields, see [Deal Registration Fields](#) (on page 348).

- 3 Save the record.

Submitting Deal Registrations for Approval

A *deal registration* is a request from a partner to the brand owner for exclusive rights to an opportunity. The request might or might not be granted by the brand owner. Most companies have well-defined processes to handle such requests for approval from partners. Typically, one or more employees of the brand owner evaluate the registration on a variety of criteria and decide whether to approve the request. In small companies, the employees who must approve a registration remain static; that is, the same set of approvers approve all deal registrations. However, in larger companies, the group of approvers who must approve a registration is dynamic and is based on a variety of factors, such as the deal size, partner, products, and so on.

Before you begin. Create the deal registration. For more information on creating deal registrations, see [Creating Deal Registrations](#) (on page 339). Create a workflow rule that assigns an appropriate user as the approver of deal registrations. For more information on creating workflow rules, see [Creating Workflow Rules](#) (on page 1221).

To submit deal registrations for approval

- 1 In the Submission Status field on the Deal Registrations Edit page, select Submitted.

Changing the submission status to Submitted starts the approval process. Anyone who has update access to the deal registration can start the approval process.

- 2 Click Save.

After the Submission Status field has been changed to Submitted the following occurs:

- The approval status is set to Pending Approval.
- The submission date is automatically set to the current timestamp.
- The routing of the registration begins. A workflow rule sets the Approver field of the deal registration to the appropriate user.
- The approver is added to the team of the deal registration if the approver is not already present.
- A workflow rule sends any email notifications if the workflow rule has been configured.

Approving Deal Registrations

Depending on the business processes for your company, more than one person within your company might be required to approve a deal registration before the deal registration is considered a valid opportunity.

Currently, approval routing is a manual process and only one level of approval is supported. You must modify the current approver field to move the registration along the approval chain.

Note: You can achieve multilevel approval when each approver in the approval chain updates the Approver field for the next approver in the chain.

A deal registration can be given final approval only if it is associated with an opportunity. If the registration is not associated with an opportunity (for example, it is a stand-alone registration), it has to be linked to an existing opportunity or has to be manually converted to an opportunity. For more information on converting a deal registration to an opportunity, see [Converting Deal Registrations to Accounts, Contacts, or Opportunities](#) (on page 345). When a deal registration achieves final approval, the opportunity associated with it becomes

visible to the partner organization, because it might be necessary for the partner user to access the opportunity.

Note: The associated opportunity becomes visible to the partner organization only upon approval of the deal registration. When the registration is either returned or rejected, the visibility to the associated opportunity (if any) is not granted.

Before you begin. The submission status of the deal registration must be set to Submitted before you can approve it.

To approve deal registrations

- 1** In the Approval Status field on the Deal Registration Edit page, select Approved.
- 2** Click Save.

When you change the approval status to Approved, the following occurs:

- Oracle CRM On Demand validates that the submission status value is Submitted. If the submission status is any other value, the validation fails, and an appropriate error message is generated.
- Oracle CRM On Demand validates that the Associated Opportunity field is populated with an opportunity.
- Oracle CRM On Demand validates that the opportunity specified in the Associated Opportunity field is not already associated with an approved deal registration.
- The Registered check box on the opportunity header is selected.
- The Registration Expiration Date field on the opportunity header is populated with the expiration date for approved registration.
- The partner information from the approved registration is copied to the opportunity header.
- The final approver changes to the current user. The Current Approver field is not updated.
- The approved date changes to the current date on Oracle CRM On Demand.
- A workflow rule creates a new task to track the approval action.
- A workflow rule sends the appropriate email notifications if the workflow rule has been configured.

Returning Deal Registrations

As a deal registration goes through the approval chain, an approver can return the registration to the creator to make changes to the deal registration parameters.

Before you begin. The deal registration must have a submission status of Submitted.

To return deal registrations

- In the Approval Status field on the Deal Registration Edit page, select Returned. Then click Save.

When you change the approval status to Returned, the following occurs:

- The submission status of the registration is set to Not Submitted.

- The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.
- A task record is created to track the return action of the approver.
- A workflow rule sends the appropriate email notifications if the workflow rule has been configured.

The creator of the deal registration can now update the deal registration and resubmit it. For more information on submitting deal registrations, see [Submitting Deal Registrations for Approval](#) (on page 340).

Rejecting Deal Registrations

As a deal registration goes through the approval chain, an approver can reject the deal registration.

Before you begin. The deal registration must have a submission status of Submitted.

To reject deal registrations

- In the Approval Status field on the Deal Registration Edit page, select Rejected. Then click Save.

When you change the approval status to Rejected, the following occurs:

- The submission status of the registration remains in the Submitted state.
- The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.
- A task record is created to track the return action of the approver.
- A workflow rule creates the appropriate email notifications if the workflow rule has been configured.

Resubmitting Deal Registrations

As a deal registration goes through the approval process, the approver might require additional information to approve or reject the registration. In such cases, the approver can return the registration to the owner and specify a reason for the return. Alternatively, the owner of the registration might recall the registration in order to supply additional information.

After the registration has been returned or recalled, the owner can update it. After the owner updates the deal registration, he or she can resubmit it for approval.

Before you begin. The submission status for the deal registration must be either Recalled or Not Submitted.

To resubmit deal registrations for approval

- 1 On the Deal Registration Edit page, add the additional information.
- 2 In the Submission Status field on the Deal Registrations Edit page, select Submitted.

Changing the submission status to Submitted starts the approval process. Anyone who has update access to the deal registration can start the approval process. Then click Save.

When the Submission Status field has been changed to Submitted the following occurs:

- The approval status is set to Pending Approval.
- The submission date is automatically set to the current timestamp.
- The routing of the registration begins. A workflow sets the Approver field for the deal registration to the appropriate user.
- The approver is added to the team of the deal registration if the approver is not already present.
- A workflow rule sends the appropriate email notifications if the workflow rule has been configured.

Canceling Deal Registrations

The brand owner can cancel deal registrations when the Approval Status field is set to either of the following:

- Pending approval
- Approved

Canceling a deal registration is not supported when the approval status is any other value.

To cancel deal registrations

- In the Approval Status field on the Deal Registration Edit page, select Cancelled. Then click Save.

When an approved deal registration is canceled, the following updates are made to the associated opportunity:

- The Registered check box is not selected.
- The Registration Expiration Date field changes to a null value.
- The Registered Partner field changes to a null value.

Ending the Period for Deal Registrations

You can end the period for deal registrations at any time.

To end the period for deal registrations

- In the Approval Status field on the Deal Registration Edit page, select Expired. Then click Save.

When you change the approval status to Expired, the following occurs:

- The Registered check box on the opportunity header is not selected.
- The date in the Registration Expiration Date field on the opportunity header returns to a null value.
- The Registered Partner field on the opportunity header returns to a null value.

Updating Deal Registrations

You do not always have all the information you require when first creating a deal registration. Additionally, you can add product information to a registration only after the deal registration has been created. So, Oracle CRM On Demand allows you to view and modify a deal registration for which you have visibility.

When a deal registration has the status of Not Submitted or Recalled, you can edit the registration, or add or remove revenue line items. When a deal registration has any other status, you cannot make these changes.

To update a deal registration

- 1 On the Deal Registration List page, click Edit.
- 2 On the Deal Registration Edit page, make the changes that you want to the deal registration. Then click Save.

Linking Products to Deal Registrations

When you register a new opportunity you have some idea of the type and quantity of products that the prospect is interested in. It is important to save this information about the deal registration, because many companies look at the products while considering approval of the registration. Because a deal registration might be converted to an opportunity before final approval, it is important to save the product line information on the deal so that this information can be copied to the opportunity at the time of conversion.

Before you begin. Your company administrator must have made the Product Revenues related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

Create the deal registration, and set the status to Not Submitted or Recalled. You can add product lines to the deal registration after creating the registration but before submitting it for approval.

To link products to deal registrations

- 1 In the Product Revenues section of the Deal Registration Detail page, click Add.
- 2 In the fields, enter the product name, quantity, and price for the product that you want to link to the deal registration. Then click Save.

For more information on linking records, see [Linking Records to Your Selected Record](#) (on page 61).

Calculating the Deal Size

A deal registration might have zero, one, or more product line items associated with it. Each product line item might have a revenue value associated with it. You can set the deal size on the deal registration header to be the total of all the revenue line items, using the appropriate currency conversion.

Before you begin. Your company administrator must have made the Product Revenues related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To calculate the deal size

- 1 In the Product Revenues section of the Deal Registration Details page, click Update Deal Size.

Oracle CRM On Demand fetches the revenue from each line item and converts it to the deal currency (specified on the registration header). While performing the conversion, Oracle CRM On Demand considers the exchange date on the line item. If an exchange date has been specified for the line item, then the exchange rate on that date is used while performing the conversion. If no exchange date has been specified, then Oracle CRM On Demand uses the current date for the conversion calculations.

The converted revenue from each line item is added to a running total, and the resulting value is populated in the Deal Size field on the registration header.
- 2 Click Save.

Associating Deal Registrations with Opportunities

Oracle CRM On Demand allows you to associate existing deal registrations with existing opportunities and to change existing associations between the two. Also, a deal registration might be associated with an incorrect opportunity.

To associate a deal registration with an opportunity

- 1 On the Deal Registrations List page, click Edit for the deal registration that you want to work with.
- 2 In the Associated Opportunity field on the Deal Registrations Edit page, search for and select the opportunity that you want to associate the deal registration with. Then click Save.

Converting Deal Registrations to Accounts, Contacts, or Opportunities

If your user role has the appropriate setup, you can create account, contact, and opportunity records, or merge deal registration information with existing records by converting the deal registration record. Depending on your company's settings, the new opportunity record can include information that affects revenue calculations.

Before you begin. You must do the following tasks:

- Create the deal registration. For more information on creating deal registrations, see [Creating Deal Registrations](#) (on page 339).
- Set up your user role and access profile settings. For more information about these settings, see [Access Profile and Role Settings for Converting Deal Registrations](#) (on page 346).

To convert a deal registration to an account, contact, or opportunity

- 1 Select the deal registration that you want to convert from the All Deal Registrations section on the Deal Registration homepage.

For information on selecting deal registrations, see [Finding Records](#) (on page 41).

- 2 On the Deal Registration Detail page, click the Convert to Opportunity button.
- 3 On the Convert Deal Registration page, do one of the following:
 - To create new account and contact records for this deal registration, select the Auto-Create New Account and Auto-Create New Contact options.

In the Account section, the Associated Company field for the deal registration appears in the Associated Account field by default. In the Contact section, the first name and last name for the deal registration appear by default.
 - To create a new opportunity and link the opportunity to an existing account and contact, select the Use Existing Account and Use Existing Contact options.

If the registration record has an associated account, this account appears in the Associated Account field. If the registration record has an associated contact, this contact appears in the Associated Contact field.
 - To link the deal registration to a different account or contact, click the Lookup icon next to the Associated Account or Associated Contact fields, and select another account and contact. Make sure the correct names appear in the Associated Account and Associated Contact fields and that the Use Existing Account and Use Existing Contact options are selected.
- 4 To convert the deal registration to an opportunity, select Auto-Create Opportunity, and complete the fields.

The name of the deal registration appears in the Opportunity Name field by default. Data in the revenue, close date, next step, and description fields are also carried over to the opportunity record. You can edit this data in the Convert Deal Registration page. You can also associate the deal registration with an existing opportunity. To do so, do the following:

 - a Select the Use Existing Opportunity option
 - b Select the appropriate opportunity by using the Lookup icon next to the Associated Opportunity field.
- 5 To convert the deal registration, click Save.

Access Profile and Role Settings for Converting Deal Registrations

To convert deal registrations to accounts, contacts, or opportunities, you must have the appropriate settings in your access profiles and in your user role. This topic describes the required settings.

Access Profile Settings for Converting Deal Registrations

The access levels that allow you to convert deal registrations are shown in the following tables. These settings are required on both your default-access profile and your owner-access profile.

The following table shows the access-levels for record types that allow you to convert deal registrations.

Record Type	Access Level
Account	Read and Edit
Contact	Read and Edit
Deal Registration	Read and Edit
Opportunity	Read and Edit

The following table shows the access-levels for related information record types that allow you to convert deal registrations.

Record Type	Related Information Record Type	Access Level
Account	Addresses	Read, Create, and Edit
Contact	Accounts	Read and Create
	Addresses	Read, Create, and Edit
Opportunity	Revenue	Read and Edit
	Contact	Read and Create

User Role Settings for Converting Deal Registrations

The role settings that allow you to convert deal registrations are as follows:

- The role must have the PRM Deal Registrations: Convert Deal Registrations privilege.
- The record-type access for the role must have the following settings:
 - The Has Access check box must be selected for the Deal Registration record type in all cases of deal registration conversion.
 - To convert (that is, associate or link) deal registrations to existing opportunities, the Has Access check box must be selected for the Opportunity record type.
 - To convert deal registrations to new opportunities, the Has Access and Can Create check boxes must be selected for the Opportunity record type.
 - To convert deal registrations to existing accounts, the Has Access check box must be selected for the Account record type.
 - To convert deal registrations to new accounts, the Has Access and Can Create check boxes must be selected for the Account record type.
 - To convert deal registrations to existing contacts, the Has Access check box must be selected for the Contact record type.
 - To convert deal registrations to new contacts, the Has Access and Can Create check boxes must be selected for the Contact record type.

Deal Registration Fields

Use the Deal Registration Edit page to add a deal registration or update details for an existing deal registration. The Deal Registration Edit page shows the complete set of fields for a deal registration.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Deal Registration Key Information	
Name	The name of the deal registration. To avoid duplicate records, make sure you follow the naming conventions your company has set up for abbreviations, capitalization, and so on.
Type	The type of deal registration. The options include: Standard and Non-Standard.
Submission Status	The submission status of the deal registration. The options include: Not Submitted, Submitted, and Recalled.
Expiration Date	The date on which the deal registration will expire.
Special Price Req'd.	Indicates whether special pricing is required for the deal registration.
Associated Lead	A unique identifier for the lead that resulted in the deal registration.
ID	The unique identifier (ID) for the deal registration.
Principal Partner	The partner account that discovered the deal registration. The partner who discovered the deal registration might no longer own it.
Principal Partner: Location	The location of the originating partner account.
Partner Program	The partner program to which the deal registration is attached.
Objective	The objective associated with deal registration.
Support Req'd.	Indicates whether presales support is required for the deal registration.
Opportunity Information	
Associated Opportunity	The name of the opportunity with which the deal registration is associated.
New Opportunity	Indicates whether the opportunity associated with the deal registration is a new one.
Currency	The selected currency for the opportunity with which the deal registration is associated.
Deal Size	The size of the deal in the units of the selected currency.
Close Date	The close date for the opportunity with which the deal registration is

Field	Description
	associated.
Product Interest	The product area in which the prospective customer is interested.
Next Step	The next logical step in the selling process for the opportunity associated with the deal registration.
Customer Information	
Associated Customer	The name of the customer organization associated with the deal registration.
New Customer	Indicates whether the deal registration is for a new customer organization.
Company Name	The name of the customer organization.
Country	The country in which the customer organization is based.
Street	The customer organization's street address.
City	The city in the customer organization's address.
State	The state in the customer organization's address.
Postal Code	The postal code of the customer organization's address.
Associated Contact	The name of an associated contact.
New Contact	Indicates whether this is a new contact.
Mr./Mrs.	Indicates the appropriate salutation designation.
First Name	The customer's first name.
Middle Name	The customer's middle name.
Last Name	The customer contact's last name.
Job Title	The customer contact's job title.
Email	The customer contact's email address.
Telephone #	The customer contact's telephone number.
Cell Phone	The customer contact's cell phone number.
Fax	The customer contact's fax number.
Approval Information	
Approval Status	The current status of the deal registration approval.
Current Approver	The name of the person who must approve the deal registration next.

Field	Description
Final Approver	The name of the person who granted final approval to the deal registration.
Submitted Date	The date on which the deal registration was submitted for approval.
Approved Date	The date on which the deal registration was finally approved.
Reject Reason	The reason for rejecting approval of the deal registration.
Description	Additional information about the deal registration. This field has as a limit of 250 characters.
Additional Information	
Owner	The name of the owner of the deal registration. The owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects which records are included in the reports that you or your managers run from the Reports and Dashboard pages.
Owner Partner Account	The name of the partner account that owns the deal registration.
Originating Partner Account	The name of the partner account that discovered the deal registration. The partner who discovered the deal registration might no longer own it
Description	Enter any additional information about the deal registration.

MDF Requests

Market development funds (MDF) provide brand owners with the ability to make marketing funds available to a partner in an organized way, so that a partner can sell the brand owner's products in specific geographical areas or so that a partner can market its brand. An *MDF request* is a request for funds in which a partner asks the brand owner for funds.

Partners can request preapprovals to fund marketing activities. The MDF requests identify the details of the marketing activity and its estimated cost. The MDF request is then routed through an approval process. The brand owner provides the approved funds for the MDF request and can approve, reject, or return it.

After the marketing activities have been completed, partners can create claims to redeem the spent money that was preapproved by the brand owner. Claims are either created against a specific MDF request or can exist independently. An MDF request can have only one claim associated with it. When the claim is approved, the fund is debited with the associated MDF request.

Working with the MDF Requests Homepage

The MDF Request Homepage is the starting point for managing market development funds (MDF) requests.

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

Creating an MDF Request

You can create an MDF request by clicking the New button in the Recently Modified MDF Request section. For more information, see [Creating Records](#) (on page 38) and MDF Fields.

Working with MDF Request Lists

The MDF Request Lists section shows a number of lists. Oracle CRM On Demand has a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, which are based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for MDF Requests.

MDF Request List	Description
All MDF Requests	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter MDF requests.
Recently Created MDF Requests	Filters all MDF requests, sorted by the created date.
Recently Modified MDF Requests	Filters all MDF requests, sorted by the modified date.
My MDF Requests	Filters MDF requests with your name in the Owner field.
My Recently Created MDF Requests	Filters MDF requests with your name in the Owner field, sorted by the created date.
My Recently Modified MDF Requests	Filters MDF requests with your name in the Owner field, sorted by the modified date.
All Pending MDF Requests	All MDF Requests with the approval status of Pending Approval or the claim status of Claim Submitted.
My Pending MDF Requests	MDF requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted.
My Approved MDF Requests	All approved MDF requests that you own.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing My Recently Modified MDF Requests Section

The My Recently Modified MDF Requests section shows the MDF requests that you own and that were recently modified. To expand the list, click the Show Full List link.

Viewing My Pending MDF Requests Section

The My Pending MDF Requests section shows all of the MDF requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted. To expand this list, click Show Full List.

Adding Sections to Your MDF Request Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your MDF Requests Homepage:

- MDF Request Lists
- All Pending MDF Requests
- Recently Created MDF Requests
- Recently Modified MDF Requests
- My Pending MDF Requests
- My Approved MDF Requests
- My Recently Created MDF Requests
- My Recently Modified MDF Requests
- MDF Requests Pending My Approval

To add sections to your MDF Requests Homepage

- 1 On the MDF Requests Homepage, click Edit Layout.
- 2 On the MDF Requests Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing MDF Requests

To manage MDF requests, perform the following tasks:

- [Submitting MDF Requests for Approval](#) (on page 353)
- [Recalling MDF Requests](#) (on page 354)
- [Returning MDF Requests](#) (on page 354)
- [Rejecting MDF Requests](#) (on page 355)
- [Approving MDF Requests](#) (on page 356)
- [Canceling MDF Requests](#) (on page 356)

- [Submitting Claims for MDF Requests](#) (on page 357)
- [Rejecting Claims for MDF Requests](#) (on page 358)
- [Approving Claims for MDF Requests](#) (on page 358)

For additional procedures that are common to all records, see [Working with Records](#) (on page 38).

For procedures that are common to many record types, see the following:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Working with Attachments](#) (on page 91)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Submitting MDF Requests for Approval

Partners can request preapproval for the funding of marketing activities by submitting a market development fund (MDF) request. The MDF request includes the details of the activity and amount of funds that the partner estimates will be spent.

Before you begin. Create the MDF request. Create a workflow rule that assigns an appropriate user as the approver for MDF requests. For more information on creating workflow rules, see [Creating Workflow Rules](#) (on page 1221).

To submit an MDF request for approval

- 1 Select the MDF request that you want to submit for approval from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see [Finding Records](#) (on page 41).

- 2 On the MDF Request Detail page, click the Edit button.
- 3 On the MDF Request Edit page, select Submitted from the Submission Status field. Then click Save.

After you change the Submission Status field value to Submitted and save the record, the following occurs:

- The approval status is set to Pending Approval.
- The Submitted Date is automatically set to the current timestamp.
- The routing of the MDF request begins. A workflow rule sets the Approver field for the MDF request to the appropriate user.

- The approver is added to the team of the MDF request, if the approver is not already present.
- A workflow rule sends email notifications.

The MDF request appears on the list of records waiting for the approver's actions and becomes read-only for the partner (owner). Further updates to the request (for example, updating the requested amounts, changing the associated fund, and so on) are not permitted. The partner can make changes to a submitted MDF request only after recalling it successfully.

Recalling MDF Requests

After a market development fund (MDF) request has been submitted, and before it has been approved, you can recall it. After you have successfully recalled the request, you can continue updating it and resubmit it for approval.

Before you begin. The MDF request must have the submission status of Submitted and the approval status of Pending Approval.

To recall an MDF request

- 1 Select the MDF request that you want to recall from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see [Finding Records](#) (on page 41).

- 2 On the MDF Request Detail page, click the Edit button.
- 3 On the MDF Request Edit page, select Recalled from the Submission Status field. Then click Save.

When you change the submission status to Recalled, the following occurs:

- The Approval Status is reset to a null value.
- A workflow rule creates a new task to track the action (if configured).
- A workflow rule sends the appropriate email notifications (if configured).

You can now update the MDF request and resubmit it. For more information on submitting requests, see [Submitting MDF Requests for Approval](#) (on page 353).

Returning MDF Requests

As a market development fund (MDF) request goes through the approval chain, an approver can return it to the owner to make changes or provide additional information.

Before you begin. The MDF request must have the submission status of Submitted.

To return an MDF request

- 1 Select the MDF request that you want to return from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see [Finding Records](#) (on page 41).

- 2 On the MDF Request Detail page, click the Edit button.
- 3 On the MDF Request Edit page, select Returned from the Approval Status field. Then click Save.
When you change the approval status to Returned and click Save, the following occurs:
 - The submission status of the MDF request is set to Not Submitted.
 - The date is removed from the Pre-Approval Date field. However, the submitted date remains in the Submitted Date field.
 - A task record is created to track the return action of the approver.
 - A workflow rule sends the appropriate email notifications.

The owner of the MDF request can now update the request and resubmit it. For more information on submitting MDF requests, see [Submitting MDF Requests for Approval](#) (on page 353).

Rejecting MDF Requests

As a market development fund (MDF) request goes through the approval chain, an approver can reject it if the requested amount for the marketing activity cannot be granted.

Before you begin. The MDF request must have the submission status of Submitted.

To reject a MDF request

- 1 Select the MDF request that you want to reject from the All MDF Requests section on the MDF Request homepage.
For information on selecting MDF requests, see [Finding Records](#) (on page 41).
- 2 On the MDF Request Detail page, click the Edit button.
- 3 On the MDF Request Edit page, select Rejected from the Approval Status field. Then click Save.
When you change the approval status to Rejected and click Save, the following occurs:
 - The submission status of the MDF request remains in the Submitted state.
 - The date is removed from the Pre-Approval Date field. However, the submitted date remains in the Submitted Date field.
 - A task record is created to track the return action of the approver.
 - A workflow rule sends the appropriate email notifications.

After the MDF request has been rejected, it becomes read-only for the owner and further updates to it are not permitted.

Approving MDF Requests

An approver can pre-approve a MDF request and allocate funds to the requested marketing activity. Currently, approval routing for MDF requests is a manual process and only one level of approval is supported.

NOTE: You can achieve multilevel approval when each approver in the approval chain updates the Approver field for the next approver in the chain.

Before you begin. The submission status of the MDF request must be set to Submitted before you can approve it.

To approve an MDF request

- 1 Select the MDF request that you want to approve from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see [Finding Records](#) (on page 41).

- 2 On the MDF Request Detail page, click the Edit button.
- 3 On the MDF Request Edit page, enter an amount in the Amount PreApproved field.
- 4 Select Approved from the Approval Status field. Then click Save.

When you change the approval status to Approved, the following occurs:

- Oracle CRM On Demand validates that the submission status value is Submitted. If the submission status is any other value, the validation fails and an appropriate error message is generated.
- Oracle CRM On Demand validates that the amount preapproved does not exceed the approval Limit set for the current approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.
- The Last Approved By field changes to the current user. The Current Approver field is not updated.
- The preapproval date changes to the current date on Oracle CRM On Demand.
- A workflow creates a new task to track the approval action
- A workflow sends the appropriate email notifications.

After the MDF request has been approved, it becomes read-only, and further updates to it are not permitted except when submitting a related claim or extending the expiration date.

Canceling MDF Requests

The brand owner can cancel a market development fund (MDF) request at any point if the MDF request is no longer valid.

Before you begin. The approval status of the MDF request must be set to Approved.

To cancel an MDF request

- 1 Select the MDF request that you want to cancel from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see [Finding Records](#) (on page 41).

- 2 On the MDF Request Detail page, click the Edit button.
- 3 On the MDF Request Edit page, select Cancelled from the Approval Status field. Then click Save.

When you change the approval status to Cancelled, the following occurs:

- Oracle CRM On Demand validates that the approval status is set to Approved.
- A workflow rule creates a new task to track the action.
- A workflow sends the appropriate email notifications.

After the MDF request has been cancelled, it is read-only, and further updates to it are not allowed.

Submitting Claims for MDF Requests

Partners create claims to redeem the pre-approved money that was spent on marketing activities. Claims are either created against a specific market development fund (MDF) request or can exist independently.

To submit a claim for an MDF request

- 1 Select the MDF request for which you want to submit a claim from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see [Finding Records](#) (on page 41).

- 2 On the MDF Request Detail page, click the Edit button.
- 3 On the MDF Request Edit page, enter the amount in the Total Claim Amount Requested field.
- 4 From the Claim Status field, select Claim Submitted. Then click Save.

After the Claim Status field has been changed to Claim Submitted and the record has been saved the following occurs:

- The routing of the MDF request claim begins.
- A workflow rule sets the Approver field of the MDF request to the appropriate user.
- The approver is added to the team of the MDF request if the approver is not already present.
- A workflow rules sends the appropriate email notifications.

Rejecting Claims for MDF Requests

As a market development fund (MDF) claim goes through the approval chain, an approver can reject it.

Before you begin. The MDF claim must have the claim status of Claim Submitted.

To reject a claim for an MDF request

- 1 Select the MDF request for which you want to reject a claim from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see [Finding Records](#) (on page 41).

- 2 On the MDF Request Detail page, click the Edit button.

- 3 On the MDF Request Edit page, select Claim Denied from the Claim Status field. Then click Save.

When you change the claim status to Claim Denied and click Save, the following occurs: a workflow rule sends the appropriate email notifications.

Approving Claims for MDF Requests

An approver can approve a market development fund (MDF) claim and offer a credit to the partner. Only one level of approval is currently supported for MDF claims.

Before you begin. The submission status of the MDF claim must be set to Claim Submitted before you can approve it.

To approve a claim for an MDF request

- 1 Select the MDF request for which you want to approve a claim from the All MDF Requests section on the MDF Request homepage.

For information on selecting MDF requests, see [Finding Records](#) (on page 41).

- 2 On the MDF Request Detail page, click the Edit button.

- 3 On the MDF Request Edit page, enter the amount in the Total Claim Amount Approved field.

- 4 Select Claim Approved from the Claim Status field. Then click Save.

When you change the approval status to Approved, the following occurs:

- Oracle CRM On Demand validates that the total claim amount approved does not exceed the approval limit set for the approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.
- The claim decision date is set to the current date on Oracle CRM On Demand.
- A workflow rules sends the appropriate email notifications.

When the claim is approved, it debits the fund associated with the MDF request.

MDF Requests Fields

Use the MDF Request Edit page to add a market development fund (MDF) request or update the details for an existing MDF request. The MDF Request Edit page shows the complete set of fields for an MDF request.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key MDF Request Information	
ID	The MDF request identifier (ID).
Request Name	The unique name of the MDF request.
Principal Partner Account	The partner company, which is taking the lead in submitting the MDF request.
Fund	The name of the fund associated with the MDF request.
Submission Status	The status of the submission, such as Submitted, Not Submitted, or Recalled.
Due Date	The date by which you must have the MDF request approved. It is set to today's date plus 7 days by default.
Expiration Date	The date on which the MDF request is no longer valid.
Campaign	The name of the campaign with which the MDF request is associated.
Marketing Purpose	The marketing reason for the MDF request.
Region	The region for which the MDF request is being made.
Category	The category to which the MDF request belongs.
Partner Program	The name of the partner program with which the MDF request is associated.
MDF Request Currency	The requested currency for the MDF request.
MDF Request Detail Information	
Start Date	The date and time that the marketing activity starts. You can use the calendar controls to change this date.
End Date	The date and time that the marketing activity ends. You can use the calendar controls to change this date.
Amount Requested	The total requested amount for the marketing activity.
Amount PreApproved	The brand owner enters the total approved amount for the marketing activity.

Field	Description
Approval Status	The current approval status for the MDF request.
Request Date	The date and time that the MDF request was created.
Submitted Date	The date and time that the MDF request was submitted.
Pre-Approval Date	The date and time that the MDF request was preapproved.
Approver	The name of the current approver.
Last Approved By	The name of the previous approver.
Reason Code	The reason that the marketing activity was not approved. The default values are: Duplicate, Incorrect Information, Insufficient Information, and Other.
Claim Information	
Total Claim Amount Requested	The total claim amount that the partner is requesting for the marketing activity.
Total Claim Amount Approved	The total claim amount that is approved by the brand owner for the marketing activity.
Claim Status	The current status of the claim.
Claim Decision Date	The date on which a decision was made about the claim.
Additional Information	
Owner	<p>Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, you can adjust access levels to restrict or expand a user's access.</p> <p>This value affects which records are included in reports that you or your managers run from the Reports and Dashboard pages.</p>
Description	Additional information about the MDF request. This field has as a limit of 250 characters.
Owner Partner Account	The partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.
Originating Partner Account	The name of the partner who started the MDF request.

Special Pricing Requests

Special pricing requests include the set of business processes, by which a partner asks the brand owner for a discount on a product. For example, a special pricing request might be a response to a competitive deal or a downward trend in prices. The brand owner grants the lower prices and provides credits to the partner after the sale. The specially authorized price is typically valid for an authorized product, quantity, duration, and the partner or end customer or both.

Special pricing requests include the following two phases:

Special pricing request management. The partner, or the brand owner on behalf of the partner, creates a special pricing request for a product and provides details, such as the reason for the lower price. The partner submits the request to the brand owner for approval and when the request is approved, sells the inventory for a new lower price to the customer. After the sale, the partner can use the special pricing claim process to claim the difference between the original purchase cost and the new authorized cost.

Special pricing claim management. The partner creates a special pricing claim on approved and open special pricing requests to receive credit for a loss. Typically, Point-Of-Sale reports are submitted after the sale with special pricing claims. After the request is approved, the brand owner offers a credit to the partner for the difference between the original cost and the new authorized cost.

Special pricing requests benefit brand owners and partners in the following ways:

- Enable brand owners to support their partners in competitive situations
- Encourage partners to buy and stock products from brand owners, even if prices are likely to fall in the future

Working with the Special Pricing Request Homepage

The Special Pricing Request Homepage is the starting point for managing special pricing requests.

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

Creating a Special Pricing Request

You can create a special pricing request by clicking the New button in the Recently Modified Special Pricing Request section. For more information, see [Creating Records](#) (on page 38) and [Special Pricing Request Fields](#) (on page 374).

Working with Special Pricing Request Lists

The Special Pricing Request Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for Special Pricing Requests.

Special Pricing Request List	Description
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Special Pricing Request List	Description
All Special Pricing Requests	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter special pricing requests.
Recently Created Special Pricing Requests	Filters all special pricing requests, sorted by the created date.
Recently Modified Special Pricing Requests	Filters all special pricing requests, sorted by the modified date.
My Special Pricing Requests	Filters special pricing requests with your name in the Owner field.
My Recently Created Special Pricing Requests	Filters special pricing requests with your name in the Owner field, sorted by the created date.
My Recently Modified Special Pricing Requests	Filters special pricing requests with your name in the Owner field, sorted by the modified date.
All Pending Special Pricing Requests	Filters all special pricing requests with the approval status of Pending Approval or the claim status of Claim Submitted.
My Pending Special Pricing Requests	Filters special pricing requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted.
My Approved Special Pricing Requests	Filters all approved special pricing requests that you own.
Special Pricing Requests Pending My Approval	Filters special pricing requests that have the approval status of Pending Approval or the claim status of Claim Submitted, and you are the next approver.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, therefore you cannot edit or delete them.

Viewing My Recently Modified Special Pricing Requests Section

The My Recently Modified Special Pricing Requests section shows the special pricing requests that you own and were recently modified. To expand the list, click Show Full List.

Viewing My Pending Special Pricing Requests Section

The My Pending Special Pricing Requests section shows all of the special pricing requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted. To expand this list, click Show Full List.

Adding Sections to Your Special Pricing Request Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Special Pricing Requests Homepage:

- Special Pricing Request Lists
- All Pending Special Pricing Requests
- Recently Created Special Pricing Requests
- Recently Modified Special Pricing Requests
- My Pending Special Pricing Requests
- My Approved Special Pricing Requests
- My Recently Created Special Pricing Requests
- My Recently Modified Special Pricing Requests
- Special Pricing Requests Pending My Approval
- One or more report sections (Your company administrator can make report sections, such as the Special Pricing Request Analytics Report, available on your Special Pricing Requests Homepage.)

To add sections to your Special Pricing Requests Homepage

- 1 On the Special Pricing Requests Homepage, click Edit Layout.
- 2 On the Special Pricing Requests Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page. Then click Save.

Managing Special Pricing Requests

To manage special pricing requests, perform the following tasks:

- [Linking Products to Special Pricing Requests](#) (on page 364)
- [Linking Programs to Special Pricing Requests](#) (on page 365)
- [Submitting Special Pricing Requests for Approval](#) (on page 365)
- [Recalling Special Pricing Requests](#) (on page 366)
- [Returning Special Pricing Requests](#) (on page 367)
- [Rejecting Special Pricing Requests](#) (on page 367)
- [Approving Special Pricing Requests](#) (on page 368)
- [Canceling Special Pricing Requests](#) (on page 369)
- [Submitting Claims for Special Pricing Requests](#) (on page 369)
- [Rejecting Claims for Special Pricing Requests](#) (on page 370)
- [Approving Claims for Special Pricing Requests](#) (on page 370)

For additional procedures that are common to all records, see [Working with Records](#) (on page 38).

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Working with Attachments](#) (on page 91)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Linking Products to Special Pricing Requests

You can link products to special pricing requests to do the following:

- Track which products belong to the special pricing request
- Calculate the total requested and preapproved (authorized) amounts

NOTE: You click the [Update Request Totals](#) button to calculate the total requested and preapproved amounts.

Before you begin. Your company administrator must have made the Special Pricing Products related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To link a product to a special pricing request

- 1 Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) to which you want to link a product.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section, and click Add.

- 3 In the Product field, select the product that you want to add to the special pricing request.

- 4 In the Special Pricing Product Detail page, update the required fields.

For information on the fields, see [Special Pricing Product Fields](#) (on page 372).

- 5 Save the record.

To calculate the total requested and preapproved amounts

- 1 Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) for which you want to calculate the total requested and preapproved amounts.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section.
- 3 Click Update Request Totals in the Special Pricing Products section.

This calculates the total requested and pre-approved amounts and updates the fields Total Amount Request and Total Amount Authorized on the special pricing request.

Linking Programs to Special Pricing Requests

You can associate a special pricing request with a specific partner program in which you participate.

To link programs to special pricing requests

- 1 Navigate to the Special Pricing Request Edit page.
- 2 In the Partner Program list, select the partner program that you want to add to the special pricing request, then click Save.

Submitting Special Pricing Requests for Approval

The partner, or the brand owner on behalf of the partner, creates a special pricing request for a price adjustment on a product and provides details, such as the reason for the lower price. The partner submits the special pricing request to the brand owner for approval. The request might or might not be granted by the brand owner. Most companies have well-defined processes to handle such requests for approval from partners. Typically, one or more employees of the brand owner evaluate the special pricing request on a variety of criteria and ultimately decide whether or not to approve the request.

Before you begin. The special pricing request must first be created. For more information on creating records, see [Creating Records](#) (on page 38). A workflow rule must be created that assigns an appropriate user as the approver for special pricing requests. For more information on creating workflow rules, see [Creating Workflow Rules](#) (on page 1221).

To submit special pricing requests for approval

- 1 Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) that you want to submit for approval.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, click the Edit button.
- 3 On the Special Pricing Request Edit page, select Submitted from the Submission Status field.

4 Click Save.

After the Submission Status field has been changed to Submitted and the record has been saved, the following occurs:

- The approval status is set to Pending Approval.
- The submitted date is automatically set to the current timestamp.
- The routing of the special pricing request begins. A workflow rule sets the special pricing request's Approver field to the appropriate user.
- The approver is added (if not already present) to the team of the special pricing request.
- A workflow rule sends the required email notifications.

The special pricing request appears on the list of records that is waiting for the approver's action and becomes read-only for the partner (owner). Further updates to the special pricing request (for example, adding or removing products, updating the requested prices, and so on) are not permitted. The partner can make changes to a submitted special pricing request only after recalling it successfully.

Recalling Special Pricing Requests

After a special pricing request has been submitted for approval and before it has been approved, you can recall the request. After you recall successfully the special pricing request, you can continue updating it and resubmit it for approval.

Before you begin. The special pricing request must have a submission status of Submitted and an approval status of Pending Approval.

To recall special pricing requests

- 1 Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) that you want to recall.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, click the Edit button.
- 3 On the Special Pricing Request Edit page, select Recalled from the Submission Status field.
- 4 Click Save.

When you change the submission status to Recalled, the following occurs:

- The approval status is reset as blank.
- A workflow rule creates a new task to track the action.
- A workflow rule sends the appropriate email notifications.

You can now update the special pricing request and resubmit it. For more information on submitting special pricing requests, see [Submitting Special Pricing Requests for Approval](#) (on page 365).

Returning Special Pricing Requests

As a special pricing request goes through the approval chain, an approver can return it to the owner to make changes. The approver can provide comments and request additional information from the owner.

Before you begin. The special pricing request must have a submission status of Submitted.

To return special pricing requests

- 1 Select the special pricing request that you want to return from the All Special Pricing Requests section on the Special Pricing Request homepage.
For information on selecting special pricing requests, see [Finding Records](#) (on page 41).
- 2 On the Special Pricing Request Detail page, click the Edit button.
- 3 On the Special Pricing Request Edit page, select Returned from the Approval Status field. Then click Save.
When you change the approval status to Returned and click Save, the following occurs:
 - The submission status of the special pricing request is set to Not Submitted.
 - The date is removed from the Authorized Date field. However, the submitted date remains in the Submitted Date field.
 - A workflow rule creates a task record to track the return action of the approver.
 - A workflow rule sends the appropriate email notifications.

The owner of the special pricing request can update the special pricing request, and resubmit it. For more information on submitting special pricing requests, see [Submitting Special Pricing Requests for Approval](#) (on page 365).

Rejecting Special Pricing Requests

As a special pricing request goes through the approval chain, an approver can reject the special pricing request if the requested discounts cannot be granted.

Before you begin. The special pricing request must have a submission status of Submitted.

To reject special pricing requests

- 1 Select the special pricing request that you want to reject from the All Special Pricing Requests section on the Special Pricing Request homepage.
For information on selecting special pricing requests, see [Finding Records](#) (on page 41).
- 2 On the Special Pricing Request Detail page, click the Edit button.
- 3 On the Special Pricing Request Edit page, select Rejected from the Approval Status field.
- 4 Click Save.

When you change the approval status to Rejected and click Save, the following occurs:

- The submission status of the special pricing request remains in the Submitted state.
- The date is removed from the Authorized Date field. However, the submitted date remains in the Submitted Date field.
- A workflow rule creates a task record to track the return action of the approver.
- A workflow rule sends the appropriate email notifications.

After the special pricing request has been rejected, it becomes read-only for the owner and further updates to it are not permitted.

Approving Special Pricing Requests

Depending on the business processes for your company, more than one person within your company might be required to approve a special pricing request. Currently, approval routing is a manual process and only one level of approval is supported. The current approver field must be manually modified to move the special pricing request along the approval chain.

Note: Each approver in the approval chain updates the Approver field, so that multilevel approval takes place.

Before you begin. The submission status of the special pricing request must be set to Submitted before you can approve it.

To approve special pricing requests

- 1 Select the special pricing request that you want to approve from the All Special Pricing Requests section on the Special Pricing Request homepage.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, click the Edit button.
- 3 On the Special Pricing Request Edit page, select Approved from the Approval Status field.
- 4 Click Save.

When you change the approval status to Approved, the following occurs:

- Oracle CRM On Demand validates that the submission status value is set to Submitted. If the submission status is any other value, the validation fails, and an appropriate error message is generated.
- Oracle CRM On Demand validates that the total amount authorized does not exceed the approval limit set for the current approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.
- Oracle CRM On Demand validates that the Total Amount Authorized is equal to the sum of authorized amounts of all special pricing products. If it is not equal, validation fails and an appropriate error message is issued.
- The Last Approved By field changes to the current user. The current Approver field is not updated.
- The authorized date changes to the current date on Oracle CRM On Demand.
- A workflow rule creates a new task to track the approval action.

- A workflow rule sends the appropriate email notifications

After the special pricing request has been approved, it becomes read-only, and further updates to it are not permitted except when submitting a related claim or extending the expiration date.

Canceling Special Pricing Requests

The brand owner can cancel a special pricing request at any point, if the request is no longer valid.

Before you begin. The special pricing request must have an approval status of Approved.

To cancel a special pricing request

- 1 Select the special pricing request that you want to cancel from the All Special Pricing Requests section on the Special Pricing Request homepage.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, click the Edit button.
- 3 On the Special Pricing Request Edit page, select Cancelled from the Approval Status field. Then click Save.

When you change the approval status to Cancelled, the following occurs:

- Oracle CRM On Demand validates that the approval status value is Approved.
- A workflow rule creates a new task to track the action.
- A workflow rule sends the appropriate email notifications.

After the special pricing request has been cancelled, it becomes read-only and further updates to it are not permitted.

Submitting Claims for Special Pricing Requests

Partners use the special-pricing claim process to claim the difference between the original purchase cost and the new approved cost that is authorized on the special pricing request. Typically, one or more employees of the brand owner evaluate the claim using a variety of criteria and decide whether or not to approve the claim.

To submit claims for special pricing requests

- 1 Select the special pricing request for which you want to submit a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, click the Edit button.
- 3 On the Special Pricing Request Edit page, enter an amount in the Total Claim Amount Req field.

- 4 Select Claim Submitted from the Claim Status field. Then click Save.

After the Claim Status field has been changed to Submitted and the record has been saved the following occurs:

- The routing of the special pricing request claim begins. A workflow rule sets the Approver field of the special pricing request to the appropriate user.
- The approver is added to the team of the special pricing request, if not already present.
- A workflow rule sends the appropriate email notifications.

Rejecting Claims for Special Pricing Requests

As a special pricing claim goes through the approval chain, an approver can reject it.

Before you begin. The special pricing request claim must have a claim status of Submitted.

To reject a claim for a special pricing request

- 1 Select the special pricing request for which you want to reject a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, click the Edit button.
- 3 On the Special Pricing Request Edit page, select Claim Denied from the Claim Status field.
- 4 Click Save.

When you change the claim status to Claim Denied and click Save, the following occurs: a workflow rule sends the appropriate email notifications.

Approving Claims for Special Pricing Requests

An approver can approve a special pricing claim and offer a credit to the partner. Only one level of approval is currently supported for special pricing claims.

Before you begin. The claim status of the special pricing claim must be set to Claim Submitted before you can approve it.

To approve claims for special pricing requests

- 1 Select the special pricing request for which you want to approve a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Special Pricing Request Detail page, click the Edit button.

- 3 On the Special Pricing Request Edit page, enter an amount in the Total Claim Amount Approved field.
- 4 Select Claim Approved from the Claim Status field. Then click Save.

When you change the claim status to Claim Approved, the following occurs:

- Oracle CRM On Demand validates that the total claim amount approved does not exceed the approval limit set for the approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is issued.
- The claim decision date changes to the current date on Oracle CRM On Demand.
- A workflow rule sends the appropriate email notifications.

Managing Special Pricing Products as Related Items

To manage special pricing products as related items, perform the following tasks :

- [Creating Special Pricing Products as Related Items](#) (on page 371)
- [Special Pricing Product Fields](#) (on page 372)

For additional procedures that are common to all records, see [Working with Records](#) (on page 38).

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Special Pricing Products as Related Items

You can create a special pricing product as a related item of a special pricing request in order to indicate the requested cost (or other information) for a specific product. From Oracle CRM On Demand, you create a special pricing product as a related item by entering information in a form. You can access this form from the special pricing request details page.

NOTE: Before you can create special pricing products, the Special Pricing Products area must be added to the Special Pricing Request details page as a related item. For more information on adding related items, see [Customizing Related Item Layouts](#) (on page 1056).

To create special pricing products as a related items

- 1 On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section, and click Add.
- 2 In the Product Name field, select a product.
- 3 Update the rest of the fields on the Special Pricing Request Product Edit page, as needed. Then click Save.
For information on each field, see [Special Pricing Product Fields](#) (on page 372).

Special Pricing Product Fields

Use the Special Pricing Product Edit page to create a new special pricing product. The Special Pricing Product Edit page shows the complete set of available fields for a special pricing product.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. Therefore, the information you see on the screen might differ from the information in this table.

The following table provides additional information regarding the fields on the Special Pricing Product Edit pages.

Field	Description
Key Product Information	
Product	The name of the product for the special price request. If the special pricing request is related to an opportunity, then only the products that exist for that opportunity can be selected. If not, then all products are listed.
Product: Product Category	The category of the product carried over with the product definition. Read-only.
Quantity	The expected quantity of products that will be sold under this special pricing request.
Currency	The currency for the special pricing product.
Product: Part #	The part number carried over with the product definition. This field is read-only.
Product: Type	The type of product carried over with the product definition. This field is read-only.
Product: Status	The status carried over with the product definition. This field is read-only.
MSRP	The manufacturer's suggested retail price (MSRP) in the currency used. This field is read-only for the partner. If an end customer has been defined for the special pricing request and a price list has been associated with that end customer, then Oracle CRM On Demand

Field	Description
	<p>populates the MSRP field upon Special Pricing Product record save, based on this price list. The following conditions should also be met:</p> <ul style="list-style-type: none"> ■ The Price List associated with the End Customer is of type 'MSRP' ■ The status of this Price List is 'Published' ■ The Product exists on this Price List ■ The Start Date of the Special Pricing Request falls between the Effective From/To dates of the Price List (and the Price List Line Item) <p>If a price list has not been associated with the end customer, then the price list on the Special Pricing Request header will remain empty.</p>
Special Pricing Request Detail Information	
Purchase Cost	<p>The price that the partner originally paid for the product. Oracle CRM On Demand populates this field upon the Special Pricing Product record save from the price list associated with the owner partner account. The following conditions should also be met:</p> <ul style="list-style-type: none"> ■ The Price List associated with the Owner Partner Account is of type 'DIST COST' ■ The status of this Price List is 'Published' ■ The Product exists on this Price List ■ The Start Date of the Special Pricing Request falls between the Effective From/To dates of the Price List (and the Price List Line Item) <p>You can edit the Purchase Cost field and change the default value.</p>
Requested Cost	The reduced price that the partner requested for the special pricing request.
Requested Resale Cost	The resale price at which the partner wants to sell the product.
Authorized Cost	The partner's price that was negotiated for the special pricing request. This field is read-only for the partner.
Suggested Resale Price	The resale price suggested by the brand owner. This field is read-only for the partner.
Requested Amount	Calculates the discount requested. Oracle CRM On Demand calculates the amount.
Requested Discount Percent	Calculates the discount percentage requested. Oracle CRM

Field	Description
	On Demand calculates the discount percentage.
Authorized Amount	Calculates the discount authorized. Oracle CRM On Demand calculates the discount authorized.
Authorized Discount Percent	Calculates the discount percentage authorized. Oracle CRM On Demand calculates the discount percentage authorized.
Special Pricing Justification	
Competitor Name	The name of the competitor for the special pricing request.
Competitor Product	The name of the competitor's product.
Competitor Product Price	The price of the competitor's product.
Competitor Partner	The name of the competing partner.
Other Competitive Information	Any other information regarding competitive product offerings, special price justification, and so on.
Additional Information	
Description	Additional information about this list item. This field has a limit of 16,350 characters.

Special Pricing Request Fields

Use the Special Pricing Request Edit page to add a special pricing request or update details for an existing special pricing request. The Special Pricing Request Edit page shows the complete set of fields for a special pricing request.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information, described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Special Pricing Request Information	
ID	The special pricing request identifier (ID).
Request Name	The unique name of the special pricing request.
Principal Partner Account	The partner company that is leading the effort on the special pricing request.

Special Pricing Requests

Field	Description
Submission Status	The status of the submission, such as Not Submitted, Submitted, Recalled.
Due Date	The date by which you must have the special pricing request approved. This field displays the date as one week from the current day by default.
Fund	The name of the fund associated with the special pricing request.
Opportunity	The opportunity to which the special pricing request is related.
End Customer	The end customer for the special pricing request. If the request is associated with an opportunity, then you can only select Opportunity Account.
Originating Partner Account	The partner who originated the special pricing request.
Deal Registration	The deal registration for which the request is related.
Partner Program	The partner program with which the special pricing request is associated.
Currency	The currency to which the price is converted. You can select another currency to convert the price to another currency, if your company administrator sets up that feature.
Special Pricing Request Detail Information	
Start Date	The date and time from when the special pricing starts. You can use the calendar controls to change this date.
End Date	The date and time after which the special pricing is no longer effective. You can use the calendar controls to change this date.
Total Amount Requested	Oracle CRM On Demand generates the total for the requested amount of each special pricing product.
Total Amount Authorized	Oracle CRM On Demand generates the total for the authorized amount of each special pricing product.
Request Date	The date and time when the special pricing request was created.
Submitted Date	The date and time that the special pricing request was submitted.
Authorized Date	The date and time that the special pricing request was approved.

Field	Description
Approver	The name of the current approver.
Approval Status	The current approval status of the special pricing request, such as Pending Approval, Approved, Returned, Rejected, Expired, or Cancelled.
Last Approved By	The name of the person who most recently approved the special pricing request.
Reason Code	Indicates the reason why a special pricing request was returned or rejected.
Claim Information	
Total Claim Amount Req.	The total claim amount that is being requested by the partner.
Total Claim Amount Approved	The total claim amount that is being approved by the brand owner.
Claim Status	The current status of the claim, such as In Progress, Claim Submitted, Claim Denied, and Claim Approved.
Claim Decision Date	The date on which a decision was made for the claim.
Additional Information	
Owner	<p>Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in the reports that you or your managers run from the Reports and Dashboard pages.</p>
Modified	The name of the person who creates or updates the record followed by the date and time it was created or updated. Oracle CRM On Demand generates this value.
Description	Additional information about the special pricing request. This field has as a limit of 250 characters.
Owner Partner Account	The partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.

Funds

Use the Funds pages to create, update, and track funds.

A *fund* is typically a sum of money or a set of other resources that are set aside for a specific purpose. Funds can be market development funds, cooperative funds, trade promotion funds, and so on. From the Funds pages, you can manage a set of activities that require preapproval and process claims for marketing funds. As a fund manager, you create a fund record.

When you create a fund record, you become the owner of the fund or the fund manager. Fund owners can update or delete fund records, add other users as fund participants, create credit and debit entries, and add attachments and notes to a fund.

Fund participants can view the fund record, but they cannot edit it. They can also submit preapproval requests and claim requests against the funds in which they are listed as participants. Fund managers can view and edit all fund requests against the funds that they own and can approve or reject these fund requests.

NOTE: You cannot edit fund requests in which the Status field is set to Claim Approved.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include working with funds, the Funds tab might be excluded from your setup.

Working with the Funds Homepage

The Funds Homepage is the starting point for managing funds and fund requests.

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

Creating a Fund or a Fund Request

You can create a fund or a fund request by either clicking Fund or Fund Request in the Create section at the left of the Fund Homepage. For more information, see [Creating Records](#) (on page 38) and [Fund Fields](#) (on page 386).

Working with Fund Lists or Fund Request Lists

The Fund Lists and Fund Request List sections show a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard fund lists that are available by default.

Fund List	Filters
All Funds	All the funds that you and your subordinates own

Fund List	Filters
All Active Funds	All the funds that you and your subordinates own with a Status of Active
My Funds	Funds with your name in the Owner field
My Active Funds	Funds with your name in the Owner field and with a Status of Active

The following table describes the standard fund request lists that are available by default.

Fund Request List	Filters
All Fund Requests	All the fund requests that you and your subordinates own
My Fund Requests	Fund requests with your name in the Owner field
My Pending Fund Requests	All fund requests that you own with the status of Pre-Approval Submitted.
Pending Fund Request	All fund requests with the status of Pre-Approval Submitted.
My Approved Fund Requests	All fund requests that you own with the status of Pre-Approved.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Your Pending Fund Requests

To view your pending fund requests, look in the My Pending Fund Requests section, which shows the following information: Fund Request Name, Fund, Pre-Approved Req, Granted, Approved, Request Date, Due Date, and Status.

Your pending fund requests are the requests with the status of Pre-Approval Submitted.

To expand the list of recently modified funds, click Show Full List.

Viewing Open Activities for Fund Requests

To view the open activities for fund requests, look in the Fund Request - Open Activities section, which shows the following information: Due Date, Priority, Activity, Subject, and Fund Request.

This information provides the list of the open activities that are linked to your fund requests. The Priority field shows the priority for tasks that you or your manager specified, such as 1-High, 2-Medium, or 3-Low. The task

priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.

To expand the list of recently modified fund requests, click Show Full List.

Adding Sections to Your Funds Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Funds Homepage:

- Pending Fund Requests
- One or more report sections (your company administrator can make report sections available on your Funds Homepage)

To add sections to your Funds Homepage

- 1 On the Funds Homepage, click Edit Layout.
- 2 On the Funds Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Topics

See the following topics for related Fund information:

- [Funds](#) (on page 377)
- [Managing Funds](#) (on page 379)
- [Fund Fields](#) (on page 386)

Managing Funds

To manage funds, do the following tasks:

- [Adding Fund Participants](#) (on page 380)
- [Adding Credits to Funds](#) (on page 381)
- [Processing Requests for Funds](#) (on page 382)
- [Processing Claims](#) (on page 385)
- [Applying Debits Against Funds](#) (on page 386)

- [Reviewing Fund Activity](#) (on page 386)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: You can update a fund record if you are its owner. If you are a fund participant, you can create and update fund requests.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Transferring Ownership of Records](#) (on page 83)
- [Adding Notes](#) (on page 87)
- [Attaching Files and URLs to Records](#) (on page 94)
- [Deleting and Restoring Records](#) (on page 100)
- [Viewing Audit Trails for Records](#) (on page 105)
- [Customizing the Audit Trail](#) (on page 1069)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Fund information and topics of interest:

- [Working with the Funds Homepage](#) (on page 377)
- [Fund Fields](#) (on page 386)
- [Reports](#) (on page 675)
- [Tracking Assets](#) (on page 188)

Adding Fund Participants

When you create a fund record, you become the owner by default. Next you want to add fund participants. Adding someone as a fund participant allows that person to view the fund record and submit fund requests against the fund.

Before you begin. For users to appear on the list of eligible fund participants, they must first be set up as active users of Oracle CRM On Demand High Tech Edition.

To add a fund participant

- 1 Select the fund.
For instructions on selecting funds, see [Finding Records](#) (on page 41).
- 2 On the Fund Detail page, scroll down to the Fund Participants section and click Add Participant.
NOTE: You might have to add the Fund Participants section to your layout. For information on changing the layout, see [Changing Your Detail Page Layout](#) (on page 619).
- 3 On the Add Fund Participant page, click the Lookup icon, and select the user.
The user list consists of all people using Oracle CRM On Demand High Tech Edition.
- 4 Save the record.

Adding Credits to Funds

To make funds available, add credit to the fund.

To add credit to a fund

- 1 Select the fund.
For instructions on selecting funds, see [Finding Records](#) (on page 41).
- 2 On the Fund Detail page, scroll down to the Fund Credits section and click New in the title bar.
NOTE: You might have to add the Fund Credits section to your layout. For information on changing the layout, see [Changing Your Detail Page Layout](#) (on page 619).
- 3 Enter the information as described in the following table, and then save the record.

Field	Description
Fund	The name of the fund, which is set to the current fund by default. (View-only.)
Credit Name	The name of this credit record. This field has a limit of 30 characters. (Required field.)
Amount	The amount of the credit that you are applying to the fund, for example, \$500.
Description	The description of this fund credit.

Field	Description
Expiration Date	The date after which the credit will no longer be valid (MM/DD/YYYY). The date is provided for informational purposes. Use the Calendar icon to select the date.

Processing Requests for Funds

When you want to start using some of the fund amount, create a fund request and submit it to the fund manager for approval. To track the stage of the fund request, you and your fund manager update the Status field.

To submit a request for pre-approval

- 1 Select the fund.

For instructions on selecting funds, see [Finding Records](#) (on page 41).

- 2 On the Fund Detail page, scroll down to the Fund Requests section and click New.

NOTE: You might have to add the Fund Requests section to your layout. For more information, see [Changing Your Detail Page Layout](#) (on page 619).

- 3 On the Fund Request Edit page, enter the required information.

The following table describes field information for fund requests. Your administrator can add, rename, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Fund Request Information	
Request ID*	The identifier for the fund request. Oracle CRM On Demand generates the Request ID. (Required field.)
Fund Request Name	The name of the Fund Request. Limit of 50 characters. (Required field.)
Type	<p>Indicates the fund type. This is a customizable field, which your company administrator can alter. (Required field.)</p> <p>Two types of funds are provided:</p> <ul style="list-style-type: none"> ■ MDFs (market development funds). These funds are used by the company's sales or marketing department to help a partner, reseller, or distributor to sell and market your products. ■ SPFs (special pricing authorization). These funds are used by a company to support special pricing requests. These special pricing requests are fund requests that a partner submits to obtain a special price on a product or group of products. This price is usually requested so the partner can stay competitive or make a specific margin.

Field	Description
Fund	The name of the linked Fund. (Required field.)
Status	<p>The current status of the Fund Request. Required field. (Required field.)</p> <p>The following are the default options: Claim Approved, Claim Denied, Claim Submitted, In Progress, Pre-Approval Denied, Pre-Approval Submitted, or Pre-Approved.</p> <p>Fund participants can change the status to: In Progress, Pre-Approval Submitted, or Claim Submitted.</p>
Due Date	The date by which you must have the fund request approved. (Required field.)
Opportunity	The opportunity to which the fund is related.
Opportunity Account	The account to which the related opportunity belongs.
Campaign	Use to link a campaign with a fund.
Marketing Purpose	Default options are Partner Incentive, Joint Marketing, Competitive Positioning, New Product Launch, or Customer Retention.
Region	Default options are Africa, Asia/Pacific, Europe, Latin America, Middle East, None, North America, Northern Europe, Other, South America, Southern Europe, or Worldwide.
Category	Default options are Advertising, Branding, Customer Event, Direct Mailing, Displays, Executive Event, Joint Advertising, Other, Promotion, Samples, Seminar, Spiff, Trade Show, or Training.
Partner Program	The partner program for which the fund request is being made.
Fund Request Detail Information	
Pre-Approval Req.	The amount of funds that you need to execute your tasks.
Granted	Used by the Fund Manager, this field contains the amount granted to the participant, based on the amount requested in the Pre-Approval Req. field.
Claim Req.	After the task is completed, the participant claims the amount spent to complete the task using this field.
Approved	Used by the Fund Manager, this field contains the amount approved based on the amount claimed.
Request Date	Defaults to today's date.
Pre-Approval Date	Used by the Fund Manager, this field contains the date on which the Fund Manager approved the fund request amount.
Claim Decision Date	Used by the Fund Manager, this field contains the date on which the Fund Manager approved the fund claim amount.
Begin Date	The beginning of the period for which the brand owner has approved the

Field	Description
	fund request.
End Date	The end of the period for which the brand owner has approved the fund request. After this date, the fund request is no longer valid.
Fund Request Currency	The currency in which the fund was requested.
Additional Information	
Owner	Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).
Modified	Name of the person who creates or updates the record, followed by the date and time when the record is created or updated. System-generated.
Owner Account	This is the partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.
Description	This field has as a limit of 250 characters.

1 For Status, select Pre-Approval Submitted.

2 Save the record.

The fund request record appears in the Pending Fund Requests section on the fund manager's Funds Homepage.

To pre-approve a fund request

1 On the Funds Homepage, select the fund request from the Pending Fund Requests section.

2 On the Fund Request Detail page, click the Edit button.

3 On the Fund Request Edit page, do the following:

a Enter the appropriate date in the Pre-Approval Date field.

b Enter the amount you approve in the Granted field.

c Update the Status field to Pre-Approved.

4 Save the record.

Processing Claims

Once the Fund Manager approves the fund request and you complete the task for which you requested the fund, you are ready to submit a claim. After you submit the claim, the Fund Manager can review and approve it.

To submit a claim

- 1** Select a fund request from a Fund Request List for which you want to submit a claim or select a preapproved fund request (listed in the Pending Fund Request section on the Funds homepage).
For instructions on selecting fund requests, see [Finding Records](#) (on page 41).
- 2** On the Fund Request Detail page, click the Edit button.
- 3** On the Fund Request Edit page, do the following:
 - a** Enter the amount you are claiming in the Claim Req. field.
 - b** Select Claim Submitted from the Status field.
 - c** Enter an appropriate date in the Due Date field.
- 4** Save the record.

To approve a claim

- 1** Select the fund request (listed in the Pending Fund Request section on the Funds homepage) for which you want to approve a claim.
For instructions on selecting fund requests, see [Finding Records](#) (on page 41).
- 2** On the Fund Request Detail page, review the amount being claimed in the Claim Req. field, and then click the Edit button.
- 3** On the Fund Request Edit page, do the following:
 - a** Enter the amount you approve in the Approved field.
 - b** Enter the date in the Claim Decision Date field.
 - c** Select Claim Approved from the Status field.

NOTE: To approve funds, you must have the Fund Approval Limit set to a sufficient value on your user record. Contact your company administrator if the approval limit is insufficient. In addition, Oracle

CRM On Demand does not allow you to approve a fund request that results in a negative fund balance unless the Allow Negative Balance check box is selected on the Fund Detail page.

- 4 Save the record.

After a claim is approved, it appears in the Fund Debits section of the fund record.

NOTE: After a claim is approved, you can no longer edit the fund request.

Applying Debits Against Funds

To deduct an amount from the fund, create a debit record.

To apply a debit against a fund

- 1 Select the fund.

For instructions on selecting funds, see [Finding Records](#) (on page 41).

- 2 On the Fund Detail page, scroll down to the Fund Debits section and click New in the title bar to create a debit entry.

- 3 On the Fund Debit Edit page, enter the required information.

The Fund Request Name has a limit of 50 characters.

Reviewing Fund Activity

You can review the fund activity for records that you manage, or if you are the fund administrator at your company, for all your company's funds and fund requests. This allows you to monitor and track fund activity.

To review a fund's activity

- 1 Select the fund.

For instructions on selecting funds, see [Finding Records](#) (on page 41).

- 2 On the Fund Detail page, scroll down to the Audit Trail section.

The list traces each activity concerning the fund, including transactions, dates, and people involved.

NOTE: You might want to add the Audit Trail section to your layout. For more information, see [Changing Your Detail Page Layout](#) (on page 619).

Fund Fields

Use the Fund Edit page to add a fund or update details for an existing fund. The Fund Edit page shows the complete set of fields for a fund record.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Fund Information	
Fund ID	The fund identifier. System-generated. (Required field.)
Fund Name	The name of the fund. Limit of 50 characters. (Required field.)
Start Date End Date	Time period that the fund is valid.
Status	Default options are Active, Closed, In Progress, or Suspended.
Type	<p>Indicates the fund type. The options for the fund type are:</p> <ul style="list-style-type: none"> ■ MDF (Market Development Funds). MDF are monetary funds given by a manufacturer's sales or marketing department to help a partner, reseller, or distributor to sell its products, or to market the manufacturer's brand. ■ SPA (Special Pricing Authorization). SPA allows partners to request a special price for a product or group of products that is being sold.
Partner	Accounts must have the Partner field checked for them to appear in this selection list.
Allow Negative Balance	<p>Selecting this check box enables the fund to carry a negative balance. For example, if the fund's balance is \$500, then a fund request of \$600 can be approved. If this check box is not selected, Oracle CRM On Demand displays a message indicating that negative balances are not allowed if the fund approver tries to approve the same \$600 fund request. (Required field.)</p> <p>This check box is selected by default.</p>
Target Amount	The total dollar amount targeted for the fund. (Required field.)
Total Credits	Read-only field. The sum of all the fund credits that are created in the Fund Credits section.
Total Debits	Read-only field. This is the sum of all the fund debits that are created in the Fund Debits section. Once a Fund Claim is approved, a debit record is automatically created in the Fund Debit section.
Balance	Read-only field. Value is: (Total Credits - Total Debits).
Total Pre-Approved	Read-only field. The sum of all the Fund Requests approved for a given Fund. Once the Fund Manager approves a Fund Request, the value is reflected in this field.
Balance after Pre-Approvals	Read-only field. Value is: (Total Credits - Total Pre-Approved).

Field	Description
Fund Currency	The currency of the fund, for example, U.S. dollars or euro. Use the Currency selector icon to choose the currency of the fund.
Additional Information	
Owner	<p>Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>
Description	Limit of 250 characters.

Related Information

See the following topics for related Fund information:

- [Funds](#) (on page 377)
- [Working with the Funds Homepage](#) (on page 377)
- [Managing Funds](#) (on page 379)

Courses

A *course* is a structured educational program offered with the primary aim of imparting a specific set of skills to an individual. Many companies, especially those that deal with complex products or services, require their partners and resellers to be adequately trained in and familiar with what they sell. Thus, courses become a mechanism to disseminate knowledge and information about a company's products and services. Typically, courses focus on a specific product or product family. However, sometimes they might also deal with generic concepts or principles. Courses can be either theoretical or practical (for example, hands-on training, laboratory based, and so on) or a blend of both.

In Oracle CRM On Demand, a course can be associated with a specific product or a set of products. Likewise, a course can also be associated with a single product category, several product categories, or none at all. With the standard configuration of Oracle CRM On Demand, you can also capture several basic attributes of a course, such as the duration, fee, start and end dates, dependencies on other courses, and so on.

Courses might be offered either by the company itself, outsourced to designated training service providers, or both. With Oracle CRM On Demand, you can define the list of third-party vendors offering the course and publish the list to partners. Once a course is published, partner employees can enroll contacts into the course.

Working with the Course Homepage

The Course Homepage is the starting point for managing courses.

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

Creating a Course

You can create a course by clicking the New button in the Recently Modified Courses section. For more information on creating courses, see [Creating Records](#) (on page 38) and [Course Fields](#) (on page 394).

Working with Course Lists

The Course Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for courses.

Course List	Description
All Courses	Lists all courses to which you have visibility, regardless of the owner.
Recently Created Courses	All courses that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created course appears first in the list.
Recently Modified Courses	All courses that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified course appears first in the list.
Recently Introduced Courses	All courses that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced course appears first in the list.
Retiring Courses	All courses that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the course that is about to be retired first appears first in the list.
My Courses	All courses that are owned by you.
My Recently Created Courses	All courses created within the last 30 days that are owned by you.
My Recently Modified Courses	All courses updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Courses

The Recently Modified Courses section shows the courses that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Course Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Course Homepage:

- All Courses
- Recently Created Courses
- Recently Modified Courses
- Recently Introduced Courses
- Retiring Courses
- My Courses
- My Recently Created Courses
- My Recently Modified Courses

To add sections to your Course Homepage

- 1 On the Course Homepage, click Edit Layout.
- 2 On the Course Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

Managing Courses

To manage courses, do the following tasks:

- [Associating Certifications with Products, Product Categories, and Solutions](#) (on page 410)
- [Associating Courses with Exams and Certifications](#) (on page 392)
- [Relating Courses to Other Courses](#) (on page 392)

- [Making Courses Visible to Partners](#) (on page 393)
- [Enrolling in Courses](#) (on page 393)
- [Updating the Course Enrollment Record](#) (on page 394)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Adding Notes](#) (on page 87)
- [Working with Attachments](#) (on page 91)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Courses with Products, Product Categories, and Solutions

You can associate courses with one or more products, product categories, and solutions. If the course is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the course is applicable to a solution, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Course Products, Course Product Categories, or Course Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate courses with products, product categories, or solutions

- 1 In the Course Products, Course Product Categories, or Course Solutions section of the Course Detail page, click Add.
- 2 On the edit page, specify the product (or, product category) and click Save.
- 3 Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate a course to solutions, regardless of whether the course is related to one solution or many solutions.

Associating Courses with Exams and Certifications

A course usually culminates in one or more exams. If you successfully pass the exam or series of exams, you are awarded a certificate. You can associate a course with exams, certifications, or both.

Before you begin.

Your company administrator must have made the Course Exams or Certification Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate courses with exams and certifications

- 1 In the Course Exams or Certification Courses section of the Course Detail page, Click Add.
- 2 In the edit page, specify the exam or certification as appropriate.
- 3 Click Save.
- 4 Repeat the above steps to add additional exam or certificate relationships.

Relating Courses to Other Courses

In Oracle CRM On Demand you can relate a course to other courses. One course can be a prerequisite to one course, a follow-up to another course, and a replacement for another, possibly retired, course.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a holistic view of the available courses and their inter-dependencies. Oracle CRM On Demand will not enforce the relationship requirements specified in this section when a contact enrolls into a course. Thus, for example, a completed enrollment in course A might be defined as a pre-requisite for getting enrolled into course B; however, this pre-requisite will not be enforced by Oracle CRM On Demand and it will allow the contact to enroll into course B even though she may not have enrolled at all into course A.

NOTE: To ensure that a course cannot be related to itself, the Related Course field cannot be the same as the course on the parent page.

Before you begin.

Your company administrator must have made the Related Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate a course to another course

- 1 On the Course List page, click the name of the course that you want to relate to another course.
- 2 In the Related Courses section of the Course Detail page, click Add.
- 3 On the Related Courses Edit page, select the related course and type of relationship. Then click Save.

Making Courses Visible to Partners

Courses are not automatically visible to partners. You can make the course visible by adding partner employees to a team, and associating that team with the course record.

Before you begin.

Your company administrator must have made the Course Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make courses visible to partners

- 1 In the Course Team section of the Course Details page, click Add Users.
- 2 On the Course Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the course to be visible.
NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.
- 3 Click Save.

Enrolling in Courses

You can use Oracle CRM On Demand to enroll in a course to improve your skill set with a specific product or a set of products.

Before you begin.

Your company administrator must have made the Course Enrollments related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To enroll in a course

- 1 On the Course List page, click the name of the course in which you want to enroll.
- 2 In the Course Enrollments section of the Course Detail page, click Enroll.
- 3 On the Course Enrollment Edit page, select the course and the candidate you want to enroll. Then click Save.

NOTE: Subject to some constraints, Oracle CRM On Demand supports multiple enrollments by the same contact into the same course. A contact might want to enroll on the same course more than one time for several reasons, for example, to complete an incomplete enrollment, as a refresher, and so on. Oracle CRM On Demand allows a contact to enroll repeatedly into the same course as long as the enrollment dates or the owner of the record are different.

Updating the Course Enrollment Record

Only users with the appropriate access rights can update the course enrollment record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the enrollment record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Course Enrollments related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update a course enrollment record:

- 1 In the Course Enrollments section of the Course details page, click the Edit link for the enrollment record you want to modify.
- 2 Modify the fields as appropriate.
- 3 Click Save.

NOTE: The default permissible values for the enrollment status field are Enrolled, Completed, and Incomplete. However, this list is completely configurable and you can modify it to suit your business requirements.

Course Fields

Use the Course Edit page to add a course or update details for an existing course. The Course Edit page shows the complete set of fields for a course.

TIP: You can also edit courses on the Course List page and the Course Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the course. This field is case sensitive, make sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on, to avoid duplicate courses. This field is required.
Type	The course type that you want to use for this course.
Status	The status of the course, such as Planned or Available. Your administrator can modify the possible values for status, you may see a set of values different from those mentioned here. This field is required.

Field	Description
Available From	The date on which the course is introduced. This field is useful if you plan to introduce a course over the next few months but want to spread awareness about it to your partner community before the introduction. This field, if specified, decides whether or not this course will be displayed on the Recently Introduced Courses list on the course home page.
Course ID	Internal identifier for the course. Within a company, this identifier is typically unique; however, Oracle CRM On Demand does not enforce uniqueness.
Primary Product Category	The name of the primary product category on which this course focuses. Use this field only if the course is focused on a single product category. If the course is equally appropriate for several product categories, leave this field blank and use the Course Product Categories related item section instead.
Primary Product	The main product on which the course focuses. If the course is for more than one product, use the Product related-item to capture the list of products. Use this field only if the course is focused on a single product. If the course is equally appropriate for several products, leave this field blank and use the Course Products related item section instead.
Available Till	The date after which the course will no longer be offered. Use this field to spread awareness among the partner community that the course is set to be de-commissioned soon. This field, if specified, decides whether or not this course will be displayed on the Retiring Courses list on the course home page.
Course Details Section	
Duration (Hours)	The duration of the course.
Course Length (Days)	The calendar length of the course. Courses of longer duration (typically more than 8 hours) are usually offered over several days.
Format	Indicates the delivery format for the course.
Medium	Indicates the delivery medium for the course.
External Unique ID	The unique identifier of the course in an external system. This ID is required when you import data from an external system and must know whether an incoming course has been previously imported.
Website	The URL of a page that contains additional information about the course. The Website field is useful if the course information is stored and maintained in some application other than Oracle CRM On Demand.
Currency	The currency used for the fee.
Course Fee	The fee charged for taking the course.
Payment Options	The method by which you will pay for the course, such as credit card or check. This is a single-value field. Therefore, if multiple payment options are allowed, define them as a value in the drop-down list. For example, "Check or Credit", "Cash or Credit", and so on.

Field	Description
Contact Information Section	
Contact	The main point of contact for the course. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Company	The company of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
First Name	The first name of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Company	The company of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The current owner of the course.
Description	Additional information about the course. This field has a limit of 2,000 characters.

Course Enrollment Fields

Use the Course Enrollment page to enroll in a course. The Course Enrollment page shows the complete set of fields for a course enrollment.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Enrollment Information	
Course	The name of the course. This field is required.
Objective	The objective, if any, for enrolling in the course.
Enrollment Date	Defaults to current system date during creation. Modifiable during and after creation.
Enrollment Status	The current status of the course enrollment. As preconfigured, this value defaults to Enrolled during creation.
Candidate	The name of the candidate who will be attending the course. Must be a contact already defined in Oracle CRM On Demand. This field is required.
Enrollment Number	Enrollment numbers are usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Completion Date	The date on which the course was completed by the candidate.
Course Partner	The partner company with whom the candidate is enrolling for the specific course.
Additional Information	
Owner	The current owner of the course enrollment.
Description	Additional information about the course enrollment. This field has a limit of 2,000 characters.

Exams

An *exam* is a means of measuring the competency of an individual in a specific skill or set of skills. Exams are usually the next logical step for an individual after completing a course. Typically, a course culminates in an exam or series of exams. An individual is expected to register and appear for the exams upon completing the course. Many companies consider that a course has been successfully completed only if all of the culminating exams have been passed with a minimum passing score.

Just as with a course, an exam can also be associated with a product or group of products as well as a product category or several product categories. In Oracle CRM On Demand, you can define an exam as being for a specific product or a set of products or product categories. You can also associate an exam with one or more courses so that the logical progression from course to exam can be captured accurately.

Because exams are usually administered and managed by authorized testing service providers rather than by the company itself, Oracle CRM On Demand lets you define the list of such third-party vendors for a specific exam. You can use Oracle CRM On Demand to register any contact you have access to for an exam.

Working With the Exam Homepage

The Exam Homepage is the starting point for managing exams.

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

Creating an Exam

You can create an exam by clicking the New button in the Recently Modified Exams section. For more information on creating exams, see [Creating Records](#) (on page 38) and [Exam Fields](#) (on page 403).

Working with Exam Lists

The Exam Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for exams.

Exam List	Description
All Exams	Lists all exams to which you have visibility, regardless of the owner.
Recently Created Exams	All exams that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created exam appears first in the list.
Recently Modified Exams	All exams that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified exam appears first in the list.
Recently Introduced Exams	All exams that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced exam appears first in the list.
Retiring Exams	All exams that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the exam that is about to be retired first appears first in the list.
My Exams	All exams owned by you.
My Recently Created Exams	All exams created within the last 30 days that are owned by you.

Exam List	Description
My Recently Modified Exams	All exams updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Exams

The Recently Modified Exams section shows the exams that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Exam Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Exam Homepage:

- All Exams
- Recently Created Exams
- Recently Modified Exams
- Recently Introduced Exams
- Retiring Exams
- My Exams
- My Recently Created Exams
- My Recently Modified Exams

To add sections to your Exam Homepage

- 1 On the Exam Homepage, click Edit Layout.
- 2 On the Exam Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

Managing Exams

To manage exams, do the following tasks:

- [Associating Exams with Products, Product Categories, and Solutions](#) (on page 400)
- [Associating Exams with Courses and Certifications](#) (on page 401)
- [Relating Exams to Other Exams](#) (on page 401)
- [Making Exams Visible to Partners](#) (on page 402)
- [Registering for Exams](#) (on page 402)
- [Updating the Exam Registration Record](#) (on page 403)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Adding Notes](#) (on page 87)
- [Working with Attachments](#) (on page 91)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Exams with Products, Product Categories, and Solutions

You can associate exams with one or more products, product categories, and solutions. If the exam is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the exam is applicable to a solution, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Exam Products, Exam Product Categories, or Exam Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate exams with products, product categories, or solutions

- 1 In the Exam Products, Exam Product Categories, or Exam Solutions section of the Exam Detail page, click Add.
 - 2 On the edit page, specify the product or, product category, and click Save.
 - 3 Repeat the above steps as many times as necessary to define all the relationships.
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NOTE: Follow the above steps to relate an exam to solutions, whether the exam is related to one solution or many solutions.

Associating Exams with Courses and Certifications

An exam or series of exams usually indicates the successful completion of a course or certification. If you successfully pass the exam or series of exams, you pass the course or are awarded a certificate. You can associate an exam with courses, certifications, or both.

Before you begin.

Your company administrator must have made the Course Exams or Certification Exams related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate exams with courses and certifications

- 1 In the Course Exams or Certification Exams section of the Exam Detail page, Click Add.
- 2 In the edit page, specify the course or certification as appropriate.
- 3 Click Save.
- 4 Repeat the above steps to add additional course or certificate relationships.

Relating Exams to Other Exams

In Oracle CRM On Demand you can relate an exam to other exams. One exam can be a prerequisite to one exam, a follow-up to another exam, and a replacement for another, possibly retired, exam.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a holistic view of the available exams and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when a contact registers for an exam. Thus, for example, a successful completion or passing of exam A might be defined as a pre-requisite for registering into exam B; however, this pre-requisite will not be enforced by Oracle CRM On Demand and it will allow the contact to register for exam B even though she may have failed exam A or not even have registered for that exam.

NOTE: To ensure that an exam cannot be related to itself, the Related Exam field cannot be the same as the exam on the parent page.

Before you begin.

Your company administrator must have made the Related Exams related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate an exam to another exam

- 1 On the Exam List page, click the name of the exam that you want to relate to another exam.
- 2 In the Related Exams section of the Exam Detail page, click Add.
- 3 On the Related Exams Edit page, select the related exam and type of relationship.
- 4 Click Save.

Making Exams Visible to Partners

Exams are not automatically visible to partners. You can make the exam visible by adding partner employees to a team, and associating that team with the exam record.

Before you begin.

Your company administrator must have made the Exam Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make exams visible to partners

- 1 In the Exam Team section of the Exam Details page, click Add Users.
- 2 On the Exam Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the exam to be visible.
NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.
- 3 Click Save.

Registering for Exams

You can use Oracle CRM On Demand to register for an exam to prove your competency in a specific product or a set of products.

Before you begin.

Your company administrator must have made the Exam Registrations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To register for an exam

- 1 On the Exam List page, click the name of the exam for which you want to register.
- 2 In the Exam Registrations section of the Exam Detail page, click Register.

- 3 On the Exam Registration Edit page, select the exam and the candidate whom you want to register.
- 4 Click Save.

NOTE: Subject to some constraints, Oracle CRM On Demand supports multiple registrations by the same contact for the same exam. A contact might want to register for the same exam more than one time for several reasons, such as to improve upon a previous score or to pass a failed exam or even to renew an expired score. Oracle CRM On Demand allows a contact to register repeatedly for the same exam as long as the exam dates or the owner of the record are different.

Updating the Exam Registration Record

Only users with the appropriate access rights can update the exam registration record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the registration record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Exam Registrations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update the exam registration record:

- 1 In the Exam Registration section of the Exam Details page, click the Edit link for the registration record you want to modify.
- 2 Modify the fields as appropriate.
- 3 Click Save.

NOTE: The default permissible values for the registration status field are Registered, Passed, and Failed. However, this list is completely configurable and you can modify it to suit your business requirements.

Exam Fields

Use the Exam Edit page to add a course or update details for an existing exam. The Exam Edit page shows the complete set of fields for an exam.

TIP: You can also edit courses on the Exam List page and the Exam Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the exam. This field is case sensitive, so be sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on, to avoid duplicate exams. This field is required.
Type	The exam type that you want to use for this exam.
Status	The status of the exam, such as Planned or Available. Your administrator can modify the possible values for status, you may see a set of values different from those mentioned here. This field is required.
Available From	The date on which the exam is introduced. This field is useful if you plan to introduce an exam over the next few months but want to spread awareness about it to your partner community before the introduction. This field, if specified, decides whether or not this exam will be displayed on the Recently Introduced Exams list on the exam home page.
Exam ID	Internal identifier for the exam. Within a company, this identifier is typically unique; however, Oracle CRM On Demand does not enforce uniqueness.
Primary Product Category	The name of the primary product category on which this exam focuses. Use this field only if the exam is focused on a single product category. If the exam is equally appropriate for several product categories, leave this field blank and use the Exam Product Categories related item section instead.
Primary Product	The main product on which the exam focuses. If the course is for more than one product, use the Product related-item to capture the list of products. Use this field only if the exam is focused on a single product. If the exam is equally appropriate for several products, leave this field blank and use the Exam Products related item section instead.
Available Till	The date after which the exam will no longer be offered. Use this field to spread awareness among the partner community that the exam is set to be de-commissioned soon. This field, if specified, decides whether or not this exam will be displayed on the Retiring Exams list on the exam home page.
Exam Details Section	
Number of Questions	The total number of questions in the exam.
Time Allowed (Minutes)	The total time, in minutes, you are allowed when taking the exam.
Maximum Score	The maximum possible score that you can achieve in the exam.
Passing Score	The minimum score that you must obtain to pass the exam.
Validity (Months)	The length of time, in months, that the exam score is valid.
Website	The URL of a page that contains additional information about the exam. The Website field is useful if the exam information is stored and maintained in some

Field	Description
	application other than Oracle CRM On Demand.
Format	Indicates the delivery format for the exam.
Medium	Indicates the delivery medium for the exam.
Grading Method	The method by which the exam is graded.
Currency	The currency used for the fee.
Exam Fee	The fee charged for taking the exam.
Payment Options	The method by which you will pay for the exam, such as Credit Card, or Check. This is a single-value field. Therefore, if multiple payment options are allowed, define them as a value in the drop-down list. For example, "Check or Credit", "Cash or Credit", and so on.
Contact Information Section	
Contact	Select the main point of contact for the exam. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Company	The company of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
First Name	The first name of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Company	The company of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The current owner of the exam.

Field	Description
Description	Additional information about the exam. This field has a limit of 2,000 characters.

Exam Registration Fields

Use the Exam Registration page to register for an exam. The Exam Registration page shows the complete set of fields for an exam registration.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Registration Information	
Exam	The name of the exam. This field is mandatory.
Objective	The objective, if any, for registering for the exam.
Registration Date	Defaults to current system date during creation. Modifiable during and after creation.
Registration Status	The current status of the exam registration.
Exam Partner	The partner company administering the specific exam for which the candidate is registering.
Score Expires On	The date on which the score or grade expires.
Candidate	The name of the candidate who will be taking the exam. Must be a contact already defined in Oracle CRM On Demand. This field is required.
Registration Number	Registration numbers are usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Completion Date	The date on which the exam was completed by the candidate.
Score Achieved	The numeric score (if any) achieved on the exam.
Grade Achieved	Letter grade (if any) achieved on the exam.
Exam Date	The date on which the exam is given.
Additional Information	
Owner	The current owner of the exam registration.
Description	Additional information about the exam registration. This field has a limit of 2,000

Field	Description
	characters.

Certification

A *certification* is proof of an individual's competency in a specific set of skills. Whereas an exam measures a person's competency, a certification confirms that the person is competent. Certifications are typically awarded after a person has passed one or more exams. Therefore, certifications may be considered a logical progression of course and exams.

While not mandatory, certifications usually have an expiration date associated with them. That is, a person who holds a certificate can claim to be certified only for a defined period, after which she must re-apply for certification. When a certification has an expiration date, it is usually because the awarding company expects the skill or technology (for which the certificate was awarded) to evolve or become obsolete.

Unlike courses and exams, which might or might not be associated with products, a certification is almost always awarded for a specific product or set of products. Oracle CRM On Demand supports the association of a certificate with courses, exams, products, product categories, and solutions. None of these associations is mandatory; that is, you can associate as many or as few of these with a certification as appropriate. In some cases, you can even define a certification that is not associated with any course, exam, product, product category, or solution.

Working with the Certification Homepage

The Certification Homepage is the starting point for managing certifications.

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

Creating a Certification

You can create a certification by clicking the New button in the Recently Modified Certifications section. For more information on creating certifications, see [Creating Records](#) (on page 38) and [Certification Fields](#) (on page 413).

Working with Certification Lists

The Certification Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for certifications.

Certification List	Description
All Certifications	Lists all certifications to which you have visibility, regardless of the owner.
Recently Created Certifications	All certifications that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created certification appears first in the list.
Recently Modified Certifications	All certifications that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified certification appears first in the list.
Recently Introduced Certifications	All certifications that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced certification appears first in the list.
Retiring Certifications	All certifications that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the certification that is about to be retired first appears first in the list.
My Certifications	All certifications owned by you.
My Recently Created Certifications	All certifications created within the last 30 days that are owned by you.
My Recently Modified Certifications	All certifications updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Certifications

The Recently Modified Certifications section shows the certifications that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Certification Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Certification Homepage:

- All Certifications
- Recently Created Certifications
- Recently Modified Certifications
- Recently Introduced Certifications
- Retiring Certifications
- My Certifications
- My Recently Created Certifications
- My Recently Modified Certifications

To add sections to your Certification Homepage

- 1 On the Certification Homepage, click Edit Layout.
- 2 On the Certification Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page. Then click Save.

Managing Certifications

To manage certifications, do the following tasks:

- [Associating Certifications with Products, Product Categories, and Solutions](#) (on page 410)
- [Associating Certifications with Exams and Courses](#) (on page 410)
- [Relating Certifications to Other Certifications](#) (on page 411)
- [Making Certifications Visible to Partners](#) (on page 411)
- [Requesting Certification](#) (on page 412)
- [Updating the Certification Request Record](#) (on page 412)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Adding Notes](#) (on page 87)
- [Working with Attachments](#) (on page 91)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Certifications with Products, Product Categories, and Solutions

You can associate certifications with one or more products, product categories, and solutions. If the certification is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the certification is applicable to a solution or solutions, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Certification Products, Certification Product Categories, or Certification Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate certifications with products, product categories, or solutions

- 1 In the Certification Products, Certification Product Categories, or Certification Solutions section of the Certification Detail page, click Add.
- 2 On the edit page, specify the product, product category, or solution and click Save.
- 3 Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate a certification to solutions, regardless of whether the certification is related to one solution or many solutions.

Associating Certifications with Exams and Courses

A certification usually requires taking a course or series of courses. These courses culminate in one or more exams. If you successfully pass the exam or series of exams, you are awarded a certificate. You can associate a certification with exams, courses, or both.

Before you begin.

Your company administrator must have made the Certification Exams or Certification Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate certifications with exams and courses

- 1 In the Certification Exams or Certification Courses section of the Certification Detail page, Click Add.
- 2 In the edit page, specify the exam or course as appropriate.

- 3 Click Save.
- 4 Repeat the above steps to add additional exam or course relationships.

Relating Certifications to Other Certifications

In Oracle CRM On Demand you can relate a certification to other certifications. One certification can be a prerequisite to one certification, a follow-up to another certification, and a replacement for another, possibly retired, certification.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a complete view of all the certifications available and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when granting a certification, for example, holding certification A might be defined as a prerequisite for being granted certification B; however, this prerequisite is not enforced by Oracle CRM On Demand and it allows certification B to be granted to a contact even if she does not hold certification A.

NOTE: To ensure that a certification cannot be related to itself, the Related Certification field cannot be the same as the certification on the parent record.

Before you begin.

Your company administrator must have made the Related Certifications related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate a certification to another certification

- 1 On the Certification List page, click the name of the certification that you want to relate to another certification.
- 2 In the Related Certifications section of the Certification Detail page, click Add.
- 3 On the Related Certification Edit page, select the related certification and type of relationship. Then click Save.

Making Certifications Visible to Partners

Certifications are not automatically visible to partners. You can make the certification visible by adding partner employees to a team, and associating that team with the certification record.

Before you begin.

Your company administrator must have made the Certification Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make certifications visible to partners

- 1 In the Certification Team section of the Certification Detail page, click Add Users.
- 2 On the Certification Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the certification to be visible.

NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

- 3 Click Save.

Requesting Certification

You can use Oracle CRM On Demand to request certification for a specific product or set of products.

Before you begin.

Your company administrator must have made the Certification Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To request certification

- 1 On the Certification List page, click the name of the certification that you want to request.
- 2 In the Certification Requests section of the Certification Detail page, click Request Certification.
- 3 On the Certification Request Edit page, select the certification and candidate for certification. Then click Save.

NOTE: Multiple certification requests for the same contact are supported. This is because contacts may have a need to request the same certification more than once, because either the existing certification has expired or a previous request was declined. Oracle CRM On Demand therefore enables multiple requests to be made for the same certification for the same contact as long as the request dates are different.

Updating the Certification Request Record

Only users with the appropriate access rights can update the certification request record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the request record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Certification Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update a certification request record

- 1 In the Certification Requests section of the Certification Detail page, click the Edit link for the request record you want to modify.
- 2 Modify the fields as appropriate.
- 3 Click Save.

NOTE: The default permissible values for the Certification Status field are Requested, Granted, and Denied. However, this list is completely configurable and your company administrator can modify it to suit your business requirements.

Certification Fields

Use the Certification Edit page to add a certification or update the details for an existing certification. The Certification Edit page shows the complete set of fields for a certification.

TIP: You can also edit certifications on the Certification List page and the Certification Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the certification. This field is case-sensitive, be sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on, to prevent duplicate certifications. This is a required field.
Type	The certification type you want to use for this certification.
Status	The status of the certification, such as Planned or Available. Your administrator can modify the possible values for status, so you may see a set of values different from those mentioned here. This is a required field.
Available From	The date after which the certification is available to be requested. This field, if specified, determines whether or not this certification is displayed on the Recently Introduced Certifications list on the certification home page.
Certification ID	An internal identifier for the certification. Typically unique, but Oracle CRM On Demand does not enforce uniqueness.
Primary Product Category	The name of the primary product category that the contact will be certified for upon successfully achieving the certification. Use this field only if the certification is focused on a single product category. If the certification is equally appropriate for several product categories, leave this field blank and use the Certification Product Categories related item section instead.

Field	Description
Primary Product	The name of the primary product that the partner company will be certified for upon successfully achieving the certification. Use this field only if the certification is focused on a single product. If the certification is equally appropriate for several products, leave this field blank and use the Certification Products related item section instead.
Available Till	The date after which the certification will no longer be offered. This field, if specified, decides whether or not this certification is displayed on the Retiring Certifications list on the Certification homepage.
Certification Details Section	
Validity (Months)	The length of time, in months, that the certification is valid after it has been awarded to a contact. This field is for informational purposes only; Oracle CRM On Demand does not automatically set the validity period of an awarded certification.
Renewable	Indicates whether or not you can renew the certification awarded to a contact.
Website	The URL to a page that contains additional information about the certification. The Web site field is useful if the certification information is stored and maintained in some application other than Oracle CRM On Demand.
Currency	The currency used for the fee.
Certification Fee	The fee charged for awarding the certification.
Payment Options	The methods by which you will pay for the certification, such as credit card or check. This is a single-value field, but multiple payment options may be allowed, for example, "Check or Credit", "Cash or Credit", and so on.
Contact Information Section	
Contact	The contact for the certification.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Account	The account name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
First Name	The first name of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Company	The company of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.

Field	Description
Email	The email address of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The current owner of the certification record.
Description	Additional information about the certification record. This field has a limit of 2,000 characters.

Certification Request Fields

Use the Certification Request page to request a certification. The Certification Request page shows the complete set of fields for a certification request.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Request Information	
Certification	The name of the certification being requested. This field is required.
Objective	The objective, if any, for requesting the certification.
Request Date	The date of the requested certification. Defaults to the current system date during creation, but is modifiable during and after creation.
Certification Number	The certification numbers, which is usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Renewable	Indicates whether or not the granted certification is renewable.
Candidate	The name of the candidate requesting certification. Must be a contact already defined in Oracle CRM On Demand. This field is required.
Certification Date	The date on which the certification was awarded to the candidate.
Certification Status	The current status of the certification request.
Expiration Date	The date on which the awarded certification expires.
Additional Information	

Field	Description
Owner	The current owner of the certification request record.
Description	Additional information about the certification request record. This field has a limit of 2,000 characters.

Accreditation

An *accreditation* is proof of a partner company's ability or competence to sell something or provide an acceptable quality of service. While certifications are awarded to an individual, accreditations are awarded to a partner company. A partner company is awarded an accreditation after satisfying several requirements: usually, one of the requirements is to have a pre-defined minimum number of employees with specific certifications on its payroll. Thus, in some ways, an accreditation is a collection of certifications and is the next step in the logical progression of course to exams to certifications.

Accreditations can be associated with products, product categories and solutions. They can also be related to other accreditations.

Working with the Accreditation Homepage

The Accreditation Homepage is the starting point for managing accreditations.

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

Creating an Accreditation

You can request an accreditation by clicking the New button in the Recently Modified Accreditations section. For more information on creating accreditations, see [Creating Records](#) (on page 38) and [Accreditation Fields](#) (on page 422).

Working with Accreditation Lists

The Accreditation Lists section displays a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for accreditations.

Accreditation List	Description
All Accreditations	Lists all accreditations to which you have visibility, regardless of the owner.
Recently Created Accreditations	All accreditations that were created in the last 30 days

Accreditation List	Description
	to which you have visibility. The default sort order is reverse chronological, so that the most recently created accreditation appears first in the list.
Recently Modified Accreditations	All accreditations that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified accreditation appears first in the list.
Recently Introduced Accreditations	All accreditations that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced accreditation appears first in the list.
Retiring Accreditations	All accreditations that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the accreditation that is about to be retired first appears first in the list.
My Accreditations	All accreditations owned by you.
My Recently Created Accreditations	All accreditations created within the last 30 days that are owned by you.
My Recently Modified Accreditations	All accreditations updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Accreditations

The Recently Modified Accreditations section shows the accreditations that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Accreditation Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Accreditation Homepage:

- [All Accreditations](#)
- [Recently Created Accreditations](#)
- [Recently Modified Accreditations](#)
- [Recently Introduced Accreditations](#)
- [Retiring Accreditations](#)
- [My Accreditations](#)
- [My Recently Created Accreditations](#)
- [My Recently Modified Accreditations](#)

To add sections to your Accreditation Homepage

- 1** On the Accreditation Homepage, click Edit Layout.
- 2** On the Accreditation Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
- 3** Click Save.

Managing Accreditations

To manage accreditations, do the following tasks:

- [Associating Accreditations with Products, Product Categories, and Solutions](#) (on page 419)
- [Relating Accreditations to Other Accreditations](#) (on page 419)
- [Recording Certification Requirements for an Accreditation](#) (on page 420)
- [Making Accreditations Visible to Partners](#) (on page 421)
- [Requesting Accreditation](#) (on page 421)
- [Updating the Accreditation Request Record](#) (on page 422)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Adding Notes](#) (on page 87)
- [Working with Attachments](#) (on page 91)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Accreditations with Products, Product Categories, and Solutions

You can associate accreditations with one or more products, product categories, and solutions. If the accreditation is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the accreditation is applicable to a solution or solutions, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Accreditation Products, Accreditation Product Categories, or Accreditation Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate accreditations with products, product categories, or solutions

- 1 In the accreditation Products, Accreditation Product Categories, or Accreditation Solutions section of the Accreditation Detail page, click Add.
- 2 On the edit page, specify the product, product category, or solution and click Save.
- 3 Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate an accreditation to solutions, regardless of whether the accreditation is related to one solution or many solutions.

Relating Accreditations to Other Accreditations

In Oracle CRM On Demand you can relate an accreditation to other accreditations. One accreditation can be a prerequisite to one accreditation, a follow-up to another, and a replacement for another, perhaps, retired accreditation.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a complete view of all the accreditations and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when granting an accreditation. Thus, for example, holding accreditation A might be defined as a prerequisite for being granted accreditation B; however, this prerequisite is not enforced by Oracle CRM On Demand and allows accreditation B to be granted to a partner company even if it does not hold accreditation A.

NOTE: To ensure that an accreditation cannot be related to itself, the Related Accreditation field cannot be the same as the accreditation on the parent record.

Before you begin.

Your company administrator must have made the Related Accreditations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate an accreditation to another accreditation

- 1 On the Accreditation List page, click the name of the accreditation that you want to relate to another accreditation.
- 2 In the Related Accreditations section of the Accreditation Detail page, click Add.
- 3 On the Related Accreditation Edit page, select the related accreditation and type of relationship, then click Save.

Recording Certification Requirements for an Accreditation

An *accreditation* is proof of a partner company's ability or competence to deliver a product or service. You can use Oracle CRM On Demand to set the certification requirements for an accreditation. For example, you might require that for a partner company to be granted this accreditation, it must have 10% of their employees with the appropriate certification, and the minimum number of employees with the certification must be two. In other words, if there are 40 technical employees on the company's payroll, the company must have at least four employees with the appropriate certification. If there are only 15 employees on the company's payroll, the company still must have two employees with the appropriate certification.

Oracle CRM On Demand does not enforce the certification requirements specified in this section when granting an accreditation. This information is captured only for informational purposes and is mainly intended to educate your partners about the accreditation requirements.

Before you begin.

Your company administrator must have made the Accreditation Certification related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To record certification requirements for an accreditation

- 1 On the Accreditation List page, click the name of the accreditation for which you want to record certification requirements.
- 2 In the Accreditation Certifications section of the Accreditation Detail page, click Add.
- 3 From the Certification picklist, select the appropriate certification.
- 4 In the Number (#) of Certifications field, type a number if you want to define as a minimum number of employees required to possess this certification.
- 5 In the Percentage (%) of Employees Certified field, type a percentage if you want to define as a minimum percentage of employees that is required to possess this certification. Then click Save.

Making Accreditations Visible to Partners

Accreditations are not automatically visible to partners. You can make the accreditation visible by adding partner employees to a team, and associating that team with the accreditation record.

Before you begin.

Your company administrator must have made the Accreditation Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make accreditations visible to partners

- 1 In the Accreditation Team section of the Accreditation Detail page, click Add Users.
- 2 On the Accreditation Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the accreditation to be visible.

NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

- 3 Click Save.

Requesting Accreditation

If you believe your company has met the requirements for accreditation, you can request accreditation from the partner company.

Before you begin.

Your company administrator must have made the Accreditation Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To request accreditation

- 1 On the Accreditation List page, click the name of the accreditation that you want to request.
- 2 In the Accreditation Request section of the Accreditation Detail page, click Request Accreditation.
- 3 On the Accreditation Request Edit page, select the accreditation and partner, then click Save.

NOTE: Partner companies may have a need to request the same accreditation more than once, because either the existing accreditation has expired or a previous request was declined. Oracle CRM On Demand therefore allows multiple requests to be made for the same accreditation for the same partner company as long as the request dates are different.

Updating the Accreditation Request Record

Only users with the appropriate access rights can update the accreditation request record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the request record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Accreditation Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update an accreditation request record:

- 1 In the Accreditation Requests section of the Accreditation Detail page, click the Edit link for the request record you want to modify.
- 2 Modify the fields as appropriate.
- 3 Click Save.

NOTE: The default permissible values for the Accreditation Status field are Requested, Granted, and Denied. However, this list is completely configurable and your company administrator can modify it to suit your business requirements.

Accreditation Fields

Use the Accreditation Edit page to add an accreditation or update details for an existing accreditation. The Accreditation Edit page shows the complete set of fields for an accreditation.

TIP: You can also edit accreditations on the Accreditation List page and the Accreditation Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help. Administrators can even add additional fields to be part of an accreditation.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the accreditation. This field is case sensitive, so be sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on to ensure you avoid creating duplicate accreditations. This field is required.

Field	Description
Type	The accreditation type that you want to use for this accreditation.
Status	The status of the accreditation, such as Planned or Available. Your administrator can modify the possible values for the status field, so you may see a set of values different from those mentioned here. This is a mandatory field.
Available From	The date from which the accreditation is available. This field, if specified, determines whether or not this accreditation is displayed on the Recently Introduced Accreditation list on the Accreditation homepage.
Accreditation ID	An internal identifier for the accreditation. Typically unique, but Oracle CRM On Demand does not enforce uniqueness.
Primary Product Category	The name of the primary product category that the partner company will be certified for upon successfully achieving the accreditation. Use this field only if the accreditation is focused on a single product category. If the accreditation is equally appropriate for several product categories, leave this field blank and use the Accreditation Product Categories related item section instead.
Primary Product	The name of the primary product that the partner company will be certified for upon successfully achieving the accreditation. Use this field only if the accreditation is focused on a single product. If the accreditation is equally appropriate for several products, leave this field blank and use the Accreditation Products related item section instead.
Available Till	The date after which the accreditation will no longer be available. This field, if specified, decides whether or not this accreditation is displayed on the Retiring Accreditations list on the Accreditation homepage.
Accreditation Details Section	
Validity (Months)	The length of time, in months, that the accreditation is valid after it has been awarded to a partner company.
Renewable	Indicates whether or not you can renew the accreditation awarded to a partner company.
Website	URL to a page that contains additional information about the accreditation. The Web site field is useful if the accreditation information is stored and maintained in some application other than Oracle CRM On Demand.
Currency	The currency used for the fee.
Accreditation Fee	The fee charged for awarding the accreditation.
Payment Options	The methods by which you can pay for the accreditation, such as a credit card or check. This is a single-value field. Multiple payment options may be allowed, for example, "Check or Credit", "Cash or Credit", and so on.
Contact Information Section	
Contact	Select the main point of contact for the accreditation. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.

Field	Description
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Account	The account name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
First Name	The first name of the point-of-contact for the accreditation. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Company	The company name of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The current owner of the accreditation record.
Description	Additional information about the accreditation record. This field has a limit of 2,000 characters.

Accreditation Request Fields

Use the Accreditation Request page to request an accreditation. The Accreditation Request page shows the complete set of fields for an accreditation request.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Request Information	
Accreditation	The name of the accreditation being requested. This field is required.

Field	Description
Objective	The objective, if any, for requesting the accreditation.
Request Date	The date of the requested accreditation. Defaults to the current system date during creation, but is modifiable during and after creation.
Accreditation Number	The accreditation number, which is usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Renewable	Indicates whether or not the granted accreditation is renewable.
Partner	The name of the partner company requesting accreditation. This field is required.
Accreditation Date	The date on which the accreditation was awarded to the partner company.
Accreditation Status	The current status of the accreditation request.
Expiration Date	The date on which the awarded accreditation expires.
Additional Information	
Owner	The current owner of the accreditation request record.
Description	Additional information about the accreditation request. This field has a limit of 2,000 characters.

8 Life Sciences

Oracle CRM On Demand provides various record types for life sciences information, and for managing the pharmaceutical sales process.

The following tabs are available with Oracle CRM On Demand Life Sciences Edition:

MedEd. Use these pages to manage medical education events and invitees to those events.

Contact State License. Use these pages to record the details of the state license (or other jurisdiction) to practice medicine, and validate signatures for samples that are dropped off by a sales representative.

Inventory Period. Use these pages to organize the sales force for planning and evaluating metrics (for example, to perform interim audit counts, final audit counts, and reconciliations).

Sample Transaction. Use these pages to create, update, and track different types of sample transactions (transfers, acknowledgements, adjustments, and disbursements or drop sample transactions) and associated transaction items.

Allocation. Use these pages to allocate samples to end users and to track the quantity of sample products as well as the period during which sample products are available for distribution.

Sample Lot. Use these pages to track lot numbers for sample products.

Sample Disclaimer. Use these pages to create, update, and track disclaimers for sample products.

Messaging Plan. Use these pages to manage messaging plans (presentations delivered using a personal computer or tablet computer for sales users).

Messaging Plan Item. Use these pages to specify the items that make up a messaging plan.

Messaging Plan Item Relation. Use these pages to specify a presentation item to provide optional information to support the primary messaging plan item.

Life Sciences Processes

You can perform the following tasks using Oracle CRM On Demand Life Sciences Edition:

Tracking Medical Events

You can plan and track medical education events using the MedEd pages. A medical education event can be as simple as a lunch-and-learn session in a physician's office, or as complex as a seminar series or national sales meeting. For more information on planning and tracking medical education events, see [MedEd Events](#) (see "MedEd" on page 430).

Business Planning

The Business Planning pages provide a foundation for business-planning activities in the pharmaceutical industry. You can set the goals and objectives for accounts, contacts, and products. You can link these goals and objectives to long-term strategic plans, short-term objectives, hierarchical account plans, key opinion-leader plans, or brand plans. For more information on managing business plans, see [Business Planning](#) (on page 243).

Capturing Contact and Account Details and Planning Sales Calls

You can capture and store more detailed information about sales calls, using the call activity portion of the Contact Detail and Account Detail pages. These pages provide a list of call activities and show the call history for a contact or account. For more information on using the Contacts pages, see [Contacts](#) (on page 194). For more information on using the Account pages, see [Accounts](#) (on page 177) and [Working with Activity Lists](#) (on page 121).

Planning Sales Calls

Sales representatives can perform precall planning tasks for an account by reviewing the associated contact and account relationships. They can also review the best call times for the contact and the contact's valid medical license. This planning allows a sales representative to determine the following:

- Which products to explain
- How many samples or promotional items to drop
- Whose signature to capture to complete the sales call

For more information about these tasks, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126), [Tracking the Best Calling Times](#) (on page 205), [Contact State Licenses](#) (on page 435), and [Mass Call Planning](#) (on page 133).

Capturing Customer Information to Meet Regulatory Guidelines

You can capture the following information about customer visits:

- Products detailed
- Samples dropped to customers
- Promotional or educational items dropped to customers
- Messaging plans discussed
- Message responses
- Customer signatures captured

This information is typically required to meet the regulations of the Food and Drug Administration (FDA) and similar agencies in other countries. You can store this information in the Call Activity List Page of a contact detail record. For more information on the Activity pages, see the following:

- [Calendar and Activities](#) (on page 117)
- [Working with Activity Lists](#) (on page 121)
- [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126)

Managing Samples

Samples administrators can perform business processes, such as creating inventory periods, allocation records, and sample inventory records for sales representatives. Sales representatives can create inventory audit reports as requested by the samples administrator and can close out or reconcile inventory periods. Additionally, sales representatives can adjust inventories, transfer samples in and out, and drop samples, which create disbursement transactions. For more information about these tasks, see [Managing Samples](#) (on page 438).

Managing Customer Presentations

Sales and marketing organizations can manage their multimedia or graphic file content, create messaging plans, and distribute these messaging plans to the field sales force. Sales organizations can then deliver tailored presentations to customers while automatically capturing metrics related to customer responses. These metrics are passed to the marketing organization to analyze. Use Oracle CRM On Demand Life Sciences Edition with an offline client application. The client is required for making presentations to customers and capturing the metrics of customer responses. To manage the presentation content and the messaging plans, use Personalized Content Delivery (PCD), a type of sales presentation software. For more information on PCD, see [Personalized Content Delivery](#) (on page 494).

Managing Analytics

A sales representative, marketing organization, management team, or an administrative team within a pharmaceutical company can create detailed analytical reports within Oracle CRM On Demand Answers. Call History, MedEd Events, and PCD have analytics components that allow you to manage analytics in these areas of Oracle CRM On Demand Life Sciences Edition. For more information on using Oracle CRM On Demand Answers, see [Dashboards](#) (on page 961) and [Reports](#) (on page 675).

Creating Integration Events and Workflow Rules

Integration Events are supported for the following life sciences record types and life sciences-related record types:

- Business Plan
- Contact State License
- Inventory Period
- Sample Inventory
- Sample Lot
- Sample Transaction
- Transaction Item

For more information about integration events and workflow rules, see [About Integration Events](#) (on page 1464) and [Creating Workflow Rules](#) (on page 1221).

Performing Activity Assessments

If your company administrator has set up Activity Assessment scripts, then you will be able to perform assessments on tasks, appointments, calls, or planned calls for an account or contact. For more information

about assessments, see [Setting Up Assessment Scripts](#) (on page 1476) and [Using Activity Assessment Scripts](#) (on page 143).

Adding Books to Life Sciences Record Types

Books are supported for the following life sciences record types and life sciences-related record types:

- Allocation
- Business Plan
- Inventory Audit Report
- Inventory Period
- MedEd Event
- Objectives
- Sample Lot
- Sample Transaction

You can determine which book a user sees by default in the Book selector for each record type. For more information, see [Setting Up Default Books by Record Type for a User](#) (on page 1121). For more information about books in general, see [Book Management](#) (on page 1177).

MedEd

Use the MedEd Event pages to plan and track medical education events.

A MedEd event can be as simple as a lunch-and-learn session in a physician's office, or as complex as a seminar series or national sales meeting.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking MedEd events, the MedEd Event tab might be excluded from your setup.

Working with the MedEd Event Homepage

The MedEd Event Homepage is the starting point for managing MedEd events.

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

Creating a MedEd Event

You can create a MedEd event by clicking the New button in the My Recently Viewed MedEd Events section. For more information, see [Creating Records](#) (on page 38) and [MedEd Event Fields](#) (on page 434).

Working with MedEd Event Lists

The MedEd Event Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for MedEd events.

MedEd Event List	Filters
All MedEd Events	All events, sorted alphabetically on event name
All MedEd Events This Month	Events with Status = Active, In Progress, or Planned and with Start Date that falls within the current month.
All Current MedEd Events	Events that meet both these conditions: <ul style="list-style-type: none"> Status = Active, In Progress, or Planned Start Date falls in the range of 30 days before today to 60 days after today.
Recently Created MedEd Events	All events, sorted by the created date
Recently Modified MedEd Events	All events, sorted by the modified date
My MedEd Events	MedEd events with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified MedEd Events

The My Recently Modified MedEd Events section shows the MedEd events you modified most recently.

Viewing MedEd Event-Related Tasks

The MedEd Event-Related Tasks section shows the tasks assigned to you, sorted by due date and then priority. It also shows the following information:

- **Due Date.** Date task is due as set by you or your manager.
- **Arrow.** The priority for tasks as set by you or your manager, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, and a down arrow for low priority.

NOTE: If your company administrator has changed the default values for the Priority field, arrows might not be displayed in the Priority field in the task lists.
- **Subject.** Title of task. Click the link to review the task.

- **MedEd Event.** The MedEd event associated with the task.

To expand the list, click Show Full List.

Adding Sections to Your MedEd Event Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your MedEd Event Homepage:

- MedEd-Related Tasks
- Recently Created MedEd Events
- Recently Modified MedEd Events
- My Recently Created MedEd Events
- My Recently Modified MedEd Events
- One or more report sections (Your company administrator can make report sections available for display on your MedEd Event Homepage.)

To add sections to your MedEd Event Homepage

- 1 On the MedEd Event Homepage, click Edit Layout.
- 2 On the MedEd Event Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Information

See the following topics for related MedEd event information:

- [MedEd Events](#) (see "[MedEd](#)" on page 430)
- [Managing MedEd Events](#) (on page 432)
- [MedEd Fields](#) (see "[MedEd Event Fields](#)" on page 434)

Managing MedEd Events

For information about managing MedEd events, see:

- [Tracking Invitees to Medical Education Events](#) (on page 433)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)

- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Working with Records](#) (on page 38)
- [Transferring Ownership of Records](#) (on page 83)
- [Deleting and Restoring Records](#) (on page 100)

NOTE: You cannot edit or delete MedEd events with a status of Completed.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related MedEd event information:

- [MedEd Events](#) (see "[MedEd](#)" on page 430)
- [MedEd Event Fields](#) (on page 434)
- [Working with the MedEd Event Homepage](#) (on page 430)

Tracking Invitees to Medical Education Events

You can track invitees to the medical education event and store feedback about the event invitation.

To track invitees to a medical education event

- 1 Select the MedEd event.

For instructions on selecting MedEd events, see [Finding Records](#) (on page 41).

- 2 On the MedEd Event Details page:

- Click Add in the Invitees title bar to add invitees to the event.

NOTE: You might want to add the Invitees section to your layout. For information on changing the layout, see [Changing Your Detail Page Layout](#) (on page 619).

- Click Edit in the Invitees title bar to update the status, session details, and comments for an existing invitee.

- 3 On the Invitees page, update the information:

- a Click the Lookup icon in the New Contact column.
- b Use the Lookup window to create a new contact or select an existing one to add as an invitee.
- c On the Invitees page, select the status.

The Type and YTD Sales are carried over from the contact record.

- 4 Save the record.

MedEd Event Fields

Use the MedEd Event Edit page to add a medical event or update details for an existing event. The MedEd Event Edit page shows the complete set of fields available for an event.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
MedEd Event Detail Information	
Name	Name of the event, up to 50 characters. Required field by default.
Location	Limit of 100 characters.
Start Date	Defaults to the current date and time. Required field by default.
End Date	Defaults to one hour later than the current date and time. Required field by default.
Confirm Date	Target date for sending out confirmation about the event to the invitees.
Status	The status of the medical event. Default values are Active, Cancelled, Completed, In Progress, Inactive, and Planned. NOTE: A MedEd event with a Status of Completed becomes read-only.
Type	The type of medical event. Limit of 30 characters. Default values are CD_ROM Presentation, Conference, Hospital Display, Journal Club, Lunch and Learn, Meeting, Rounds, Seminar, Symposium, Tradeshow, and Trading.
Budget	Budget amount in the currency you specify. The default is set to the System currency. Your Administrator sets the currency using the Activity Currency field. This field is not exposed in the default page layout, but your Administrator can expose it in the custom layout.
Max Attendees	Maximum number of invitees allowed to attend this event.

Field	Description
Product	Product that you want to highlight during the event. You can select either the product or the product category, but not both. To add products, your company administrator navigates to Admin and clicks Content Management.
Product Category	Product category that you want to highlight during the event. You can select either the product or product category, but not both. To add product categories, your company administrator navigates to Admin and clicks Content Management.
CME Credit	Number of Continuing Medical Education (CME) credits for this event.
Additional Information	
Owner	Person assigned to this record. Generally, the owner can update record details or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).
Objective	Limit of 500 characters. Required field by default.
Session Details	Details regarding session. Limit of 500 characters.
Description	Limit of 250 characters.

Related Information

See the following topics for related MedEd event information:

- [MedEd Events](#) (see "MedEd" on page 430)
- [Working with the MedEd Event Homepage](#) (on page 430)
- [Managing MedEd Events](#) (on page 432)

Contact State Licenses

Use the Contact State License pages to create, update, and track contact state licenses for a contact.

A *contact state license* records the details of the state license (or another jurisdiction) to practice medicine. It is used to validate the signatures for samples that a sales representative drops (for example, a pharmaceutical sales representative) to a contact (for example, a physician). A physician has only one valid active license for each state at any time. Licenses to practice in a particular jurisdiction are renewable. If the implementation is outside the U.S., the State field is not required.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Contact State License information, the Contact State License tab might be excluded from your setup.

Working with the Contact State License Homepage

The Contact State License Homepage is the starting point for managing contact state license records.

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

Creating a Contact State License

You can create a new contact state license by clicking the New button in the Recently Modified Contact State Licenses section. For more information, see [Creating Records](#) (on page 38) and [Contact State License Fields](#) (on page 438).

Working with Contact State License Lists

The Contact State License Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for contact state licenses.

Contact State License List	Filters
All Contact State Licenses	All contact state licenses to which you have visibility regardless of who owns the contact state license.
Recently Modified Contact State Licenses	All contact state licenses with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Contact State Licenses

The Recently Modified Contact State Licenses section shows the Contact State Licenses that you viewed most recently.

Click Show Full List to expand the list.

Adding Sections to your Contact State License Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Contact State License Homepage:

- Recently Created Contact State Licenses
- Recently Modified Contact State Licenses
- My Recently Created Contact State Licenses
- My Recently Modified Contact State Licenses
- Additional report sections (Your company administrator can make report sections available for display on your Contact State License Homepage.)

To add sections to your Contact State License Homepage

- 1 On the Contact State License Homepage, click Edit Layout.
- 2 On the Contact State License Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Contact State Licenses

To manage contact state licenses that are common to many record types, do the following tasks:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related contact state license information:

- [Contact State Licenses](#) (on page 435)
- [Working with the Contact State License Homepage](#) (on page 436)
- [Contact State License Fields](#) (on page 438)

Contact State License Fields

Use the Contact State License Edit page to add a contact state license or update the details for an existing contact state license. The Contact State License Edit page shows the complete set of fields for a contact state license.

TIP: You can also edit contact state licenses on the Contact State License List page and the Contact State License Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some of the contact state license fields.

Field	Description
Contact	The contact for this state license record, typically a physician or pharmaceutical representative. Click the Lookup icon to choose a contact. (Required.)
License Number	The license number for the contact, for example, PS4231732. (Required.)
State	The U.S. state or jurisdiction associated with the license number. Use the picklist to select the state, for example, <i>NJ</i> for New Jersey. NOTE: If your jurisdiction is outside the U.S., the State field is not required.
Expiration Date	The date when the license expires (MM/DD/YYYY), for example, 10/31/2009. Use the calendar icon to select the expiration date.
Status	The status of the license, which can be Active or Inactive. Choose the status using the picklist.

Related Information

See the following topics for related information about contact state licenses:

- [Contact State Licenses](#) (on page 435)
- [Working with the Contact State License Homepage](#) (on page 436)
- [Managing Contact State Licenses](#) (on page 437)

Managing Samples

Most major pharmaceutical manufacturers provide free samples to health care professionals as part of their regular field sales activities. In the U.S, samples distribution is regulated by the Food and Drug Administration (FDA) and must be reconciled at least once a year. This topic describes how to manage and maintain an electronic inventory of samples and promotional items using Oracle CRM On Demand Samples Management.

Administrators can set up and maintain a sample inventory, and monitor samples delivery, transfers, receipts, discrepancies, adjustments, and inventory counts. End users use samples management in Oracle CRM On Demand to track an electronic inventory of samples stock, create sample transfers, acknowledge receipt of sample transfers, and adjust inventory balances for reconciliation purposes.

Samples management in Oracle CRM On Demand allows samples administrators and sales representatives to measure and monitor sample drops at every level of the organization. For more information about the differences between samples administrator and end-user tasks, see the following topics.

Scenario for Managing Samples

This topic provides one example showing the process performed by a samples administrator and the sales representatives (end users) who distribute samples to health care professionals. Your company might follow a different process according to its business requirements.

A pharmaceutical company has new products to bring to market. To set up a samples inventory, the samples administrator adds the products to the database, associates any lot numbers, allocates samples to the sales representatives, and transfers samples to the managers and sales representatives in the field. The sales representatives then visit the doctors in their territories and drop the new samples. After a month goes by, each sales representative is required by headquarters to reconcile his or her inventory. The sales representative first provides a final count of each inventory record and a new inventory period begins. The sales representative realizes that there are some discrepancies in the inventory when running the reconciliation. After making the necessary adjustments, the sales representative performs a successful reconciliation and marks the inventory as Completed and Reconciled.

In this scenario, samples administrators are responsible for their company's samples inventory and making sure it complies with regulatory rules and guidelines. In this role, they take responsibility for establishing a master samples inventory and then transferring samples to each end user. When end users receive a shipment, they submit a receipt or acknowledgement of the inventory. Oracle CRM On Demand automatically enters the received samples into their inventory counts.

In this scenario, the sales representative, the sales representative's manager, and the samples administrator can monitor discrepancies between shipped quantities and received quantities.

Administrator Procedures

Samples administrators require administrative responsibilities in samples management in Oracle CRM On Demand to carry out the following tasks:

- Define samples as products and add them to the Oracle CRM On Demand database. For more information about setting up products for your company, see [Content Management](#) (on page 1468).
- If your organization uses lot numbers to track samples, then define lot numbers and associate lot numbers with sample products. For more information, see [Sample Lots](#) (on page 486).
- Set up an inventory of samples. Each record in the sample inventory provides information to the sales representative about the product that has been categorized as qualifying for sample drop processing. For more information, see [Sample Inventory](#) (on page 451).
- Set up allocations and allocate samples to sales representatives. The allocation record determines the period of time within which sample products are provided for the sales representative to distribute to clinics, hospitals, or physician contacts when executing a sample drop call. The allocation record also defines the limits associated with the sample (for example, the maximum quantity that is allowed to be dropped during one call). For more information, see [Allocations](#) (on page 481).

- Set up an inventory period, which is the defined period within which the movement of samples or promotional items can be tracked. Administrators and sales representatives perform all initial counts, interim audit counts, final audit counts, reporting, and reconciliations within the inventory period. For more information, see [Inventory Period](#) (on page 441).
- Transfer samples to end users in the field. For more information, see [Creating a Samples Transfer](#) (on page 462).
- Monitor samples activities. Activities to monitor include sample drops, sample transfers between employees and headquarters, user inventory counts, and inventory adjustments. For more information, see [Monitoring Sample Activities](#) (on page 472).
- Store electronic signatures. Electronic signatures are captured in Oracle CRM On Demand and are stored in the Oracle CRM On Demand database. For more information about signatures, see [Checking Electronic Signatures](#) (on page 471).

End-User Procedures

The end users are the sales representatives who distribute samples to health care professionals, and they carry out the following tasks:

- Acknowledge receipt of sample inventory (that is, of sample transfers). For more information, see [Acknowledging Receipt of the Sample Inventory](#) (on page 452).
- Transfer samples to other end users or back to headquarters. Sales representatives can exchange samples among themselves and return samples (for example, samples that have expired) to headquarters. For more information, see [Creating a Samples Transfer](#) (on page 462).
- Drop samples during sales visits to customers. For more information, see [Dropping Samples During a Sales Call](#) (on page 469).
- Perform interim inventory counts as required. For more information, see [Requesting an Interim Inventory Count](#) (on page 447).
- Close out inventory periods as required. For more information, see [Closing Out an Inventory Period](#) (on page 448).
- Account for any discrepancies in inventory records by performing inventory adjustments and submitting other transactions. For more information, see [Adjusting Sample Transactions](#) (on page 465), [Creating Lost and Found Sample Transactions](#) (on page 467), [Viewing Disbursement Transactions](#) (on page 467).
- Reconcile the inventory as required. For more information, see [Process of Reconciling the Inventory](#) (on page 453).

Requirements for Managing Samples

The following requirements apply to administrators and end users:

- **Administrators.** Before you can manage samples in Oracle CRM On Demand, administrators must first define the products. For more information about setting up products for your company, see [Content Management](#) (on page 1468).
- **End users.** Before end-users can drop samples, they must have an associated allocation record for the samples, and they must acknowledge receipt of the samples. For more information about allocations and acknowledgements, see [Allocations](#) (on page 481) and [Acknowledging Receipt of the Sample Inventory](#) (on page 452).

Before you begin. Review your user roles:

- To perform all administrator procedures, your user role must be assigned administrative responsibilities, must include the Enable Basic Samples Operations privilege, the Enable Samples Adjustment privilege, and (if required) the Signature privilege.
- To perform all end-user procedures, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Inventory Period

Use the Inventory Period pages to create, update, and track inventory periods. An *inventory period* is a defined period within which all movement of samples or promotional items (sample drops, receipts, transfers, and inventory adjustments) can be tracked. The inventory period is defined by the samples administrator for the customer company. It is used to organize the sales force through planning and evaluating metrics.

Samples administrators and sales representatives perform all initial counts, interim audit counts, final audit counts, and reconciliations within the inventory period:

- **Initial Count.** The initial count is performed by the sales representative upon receipt of a new inventory. Sales representatives must physically count all samples that they receive and acknowledge that the items are in their possession. For more information, see [Acknowledging Receipt of the Sample Inventory](#) (on page 452).
- **Interim Audit Count.** The samples administrator can request an interim audit count at any time. It is a request to count the inventory and report on it. An interim audit count is often performed as a special case audit where potential fraud activity has occurred, or there appears to be a process issue with tracking the inventory. It acts as a checkpoint for the samples administrator. For more information, see [Requesting an Interim Inventory Count](#) (on page 447).
- **Final Audit Count.** The samples administrator requests the final audit count. In this case, the inventory period is coming to an end, and all samples must be accounted for. The sales representative must count and log the final physical count for each sample, and submit the final audit report. To create an audit report, the sales representative can go to the Inventory Audit Report Homepage, and create a new inventory audit report. The sales representative can also trigger the automatic creation of the final audit report, for more information, see [Closing Out an Inventory Period](#) (on page 448).
- **Reconciliation.** When the final audit count is complete, the sales representative must reconcile the inventory. For this reconciliation, the tracking of internal, sample transactions is compared with the final physical count. Any discrepancies are logged. If no discrepancies exist, the reconciliation is successful, and the inventory period is marked as reconciled. For more information, see [Correcting Physical and Electronic Count Discrepancies](#) (on page 468) and [Reconciling an Inventory Period](#) (on page 449).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking inventory period information, the Inventory Period tab might be excluded from your setup.

Types of Inventory Periods

Because reconciling samples inventory can happen as often as once a month, Oracle CRM On Demand Samples Management allows you to reconcile as often as the samples administrator requests you to. It provides three types of inventory periods for maximum flexibility.

The following table describes the types of inventory periods.

Inventory Period	Description
Active	The current period. It shows no end date, and it is not reconciled. You can enter any type of samples transaction, including adding new products. Inventory counts are adjusted accordingly.
Inactive	A past, unreconciled period. It shows an end date, but it has not been reconciled yet. You can enter any type of samples transaction, except new products to the inventory. The inventory counts are affected accordingly. The default configuration for Oracle CRM On Demand provides one inactive period.
Reconciled	A past, inactive period. It shows an end date and has been successfully reconciled. You cannot perform transactions on this locked-down inventory period.

The default configuration in Oracle CRM On Demand for samples management provides for three unreconciled periods: one active period and two inactive periods. You can have multiple reconciled inventory periods, but only one active inventory period open at any time.

Working with the Inventory Period Homepage

The Inventory Period Homepage is the starting point for managing inventory periods. This page contains several sections and displays information that is relevant to you.

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

Before you begin. To work with inventory periods, your user role must include the Enable Basic Samples Operations privilege.

Creating an Inventory Period

Only the sample administrator for the company can create an inventory period. Sales representatives cannot create inventory periods. The samples administrator creates the initial inventory period for each sales representative who uses Oracle CRM On Demand Life Sciences Edition. For more information, see [Creating Inventory Periods for Users](#) (on page 1126) and [Creating Records](#) (on page 38).

Working with Inventory Period Lists

The Inventory Period List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for inventory periods.

Inventory Period List	Filters
All Inventory Periods	All inventory periods to which you have visibility, regardless of who owns the inventory period.

Inventory Period List	Filters
Recently Modified Inventory Periods	All inventory periods with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Inventory Periods

The Recently Modified Inventory Periods section shows the inventory periods most recently modified.

Click the Show Full List link to expand the list.

Adding Sections to Your Inventory Period Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Inventory Period Homepage:

- Recently Created Inventory Periods
- Recently Modified Inventory Periods
- My Recently Created Inventory Periods
- My Recently Modified Inventory Periods
- Additional report sections (Your company administrator can make report sections available for display on your Inventory Period Homepage.)

To add sections to your Inventory Period Homepage

- 1 On the Inventory Period Homepage, click Edit Layout.
- 2 On the Inventory Period Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Related Information

See the following topics for related information about inventory periods:

- [Inventory Period](#) (on page 441)
- [Inventory Period Fields](#) (on page 449)
- [Managing Inventory Periods](#) (on page 444)

Managing Inventory Periods

For step-by-step procedures for managing inventory periods, see:

- [Adding Sample Inventory to an Inventory Period](#) (on page 444)
- [Adding Sample Transactions to an Inventory Period](#) (on page 445)
- [Adding Books to an Inventory Period](#) (on page 446)
- [Creating an Inventory Audit Report for an Inventory Period](#) (on page 446)
- [Requesting an Interim Inventory Count](#) (on page 447)
- [Closing Out an Inventory Period](#) (on page 448)
- [Reconciling an Inventory Period](#) (on page 449)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about inventory periods:

- [Inventory Period](#) (on page 441)
- [Inventory Period Fields](#) (on page 449)
- [Working with the Inventory Period Homepage](#) (on page 442)

Adding Sample Inventory to an Inventory Period

Sample administrators use the Sample Inventory Edit page to add a sample inventory line item to an inventory period for a sales representative, or update details for an existing sample inventory line item. The Sample Inventory Edit page shows the complete set of fields for sample inventory.

Sales representatives cannot add or delete sample inventory line items in an inventory period. However, when performing interim and final audit counts, sales representatives must edit the Physical Count field in the sample inventory line item in an inventory period. For more information about audit counts, see [Requesting an Interim Inventory Count](#) (on page 447) and [Closing Out an Inventory Period](#) (on page 448).

Before you begin. To add sample inventory line items to an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To add a sample inventory line item to an inventory period

- 1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.
- 2 On the Inventory Period Detail page, click New in the Sample Inventory section.
- 3 On the Sample Inventory Edit page, complete the required fields. Then click Save.

For more information about the fields on this page, see [Sample Inventory Fields](#) (on page 454).

NOTE: This procedure is suitable if you are adding small numbers of products. For adding multiple inventory records, it is recommended that you create an import file (consisting of the appropriate inventory records), and then ask your company administrator to load the data into the inventory period.

Related Topics

See the following topics for related, sample inventory information:

- [Sample Inventory](#) (on page 451)
- [Managing Sample Inventory](#) (on page 451)
- [Sample Inventory Fields](#) (on page 454)

Adding Sample Transactions to an Inventory Period

Use the Sample Transaction Edit page to add a sample transaction line item to an inventory period, or update details for an existing sample transaction line item. The Sample Transaction Edit page shows the complete set of fields for a sample transaction.

Before you begin. To add sample transactions to an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To add a sample transaction to an inventory period

- 1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.
- 2 On the Inventory Period Detail page, click New in the Sample Transactions section.
- 3 On the Sample Transaction Edit page, complete the required fields. Click Save.

For more information about the fields on this page, see [Sample Transaction Fields](#) (on page 473).

Related Information

See the following topics for related, sample transaction information:

- [Sample Transactions](#) (on page 458)
- [Working with the Sample Transaction Homepage](#) (on page 459)

- [Managing Sample Transactions](#) (on page 461)
- [Sample Transaction Fields](#) (on page 473)

Adding Books to an Inventory Period

Use the following procedure to add books to the active inventory period. When you add a book to the active inventory period, you can then modify or remove the book. This procedure assumes that the book is displayed as a related item on the Inventory Period detail page. For more information about displaying related items, see [Customizing Related Item Layouts](#) (on page 1056).

To add a book to an inventory period

- 1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.
- 2 On the Inventory Period Detail page, click Add in the Books section of the page.
- 3 In the book selector, choose the book that you want to add to the inventory period, and then click OK. For more information about books, see [Book Management](#) (on page 1177).
- 4 When required, close out the inventory period by clicking the Close Out button.

When an inventory period is closed, an inventory audit report is generated, and a new inventory period is created. All sample inventory and book information attached to the closed inventory period is copied to the new inventory period and inventory audit report. For more information, see [Closing Out an Inventory Period](#) (on page 448).

Creating an Inventory Audit Report for an Inventory Period

Use the Inventory Audit Report Edit page to create an inventory audit report for an inventory period or update details for an existing inventory audit report. The Inventory Audit Report Edit page shows the complete set of fields for an inventory audit report.

Before you begin. To create an inventory audit report for an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To create an inventory audit report for an inventory period

- 1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want
- 2 On the Inventory Period Detail page, click New in the Inventory Audit Reports section.
- 3 On the Inventory Audit Report Edit page, complete the required fields, and click Save.

For more information about the fields on this page, see [Inventory Audit Report Fields](#) (on page 456).

After you create an inventory audit report, you cannot change it. If an error is noted in a generated inventory audit report, you must make an inventory adjustment to correct the error first, and then generate a new inventory audit report after the inventory adjustment has been processed.

Related Topics

See the following topics for related information about inventory audit reports:

- [Inventory Audit Report](#) (on page 455)
- [Managing Inventory Audit Reports](#) (on page 456)
- [Inventory Audit Report Fields](#) (on page 456)

Requesting an Interim Inventory Count

When sales representatives return to their office, they are generally required to do a physical inventory count. They request an interim inventory count, which allows them to audit their inventory of samples and submit the information to the samples administrator. The samples administrator typically issues a requirement for a physical audit of inventory. The interim audit is based on corporate guidelines. An interim audit count is often performed as a special-case audit where potential fraud activity has occurred, or there appears to be a process issue with tracking the inventory. It acts as a checkpoint for the samples administrator.

You can count your physical inventory at any time during the active, unreconciled inventory period. Only active inventory periods are considered when you request an interim inventory count.

Before you begin. To request an interim inventory count, your user role must include the Enable Basic Samples Operations privilege.

To request an interim inventory count

- 1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record on which you want to perform an audit.

- 2 For each Sample Inventory line item, enter a value in the Physical Count field.

The value that you enter in the Physical Count field must correspond to the physical quantities that you have on hand for each product.

- 3 Click Interim Count.

Then the following occurs:

- The value in the Last Physical Count field changes to reflect the physical quantity value prior to your current physical quantity value. Then you can validate and compare the old physical count with the new physical count.
- A new inventory audit report is created where all line items are copied over from the current inventory.
- The current inventory period remains open.

NOTE: The Interim Count button is enabled for inventory periods that are active only.

Closing Out an Inventory Period

As an inventory period closes, the sales representative must count and log the final physical count for each sample, and submit the final audit report. The sales representative submits the final audit count (either by product or lot number) by closing out the inventory period. When you close out an inventory period, you are closing it and triggering the creation of an inventory audit report. You can close out active inventory periods only.

Closing out an inventory period is also an important step in [Process of Reconciling the Inventory](#) (on page 453).

Before you begin. To close out an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To close out an inventory period

- 1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want to close out.

- 2 For each Sample Inventory line item, enter a value in the Physical Count field.

The value that you enter in the Physical Count field must correspond to the physical quantity that you have on hand for each product.

- 3 Click Close Out.

When you click Close Out, the following happens:

- The inventory period that you opened in step 1 is closed by assigning an inventory period end date, and a new inventory period is created containing all the records that were in the old inventory period.
- The values from the Physical Count field (in the Sample Inventory records) in the old inventory period are copied to the Opening Balance field (in the corresponding Sample Inventory records) in the new inventory period.
- All samples that have not expired are copied from the old inventory period to the new inventory period.
- Any expired samples with a quantity greater than zero are copied from the old inventory period to the new inventory period.
- All book information associated with the old inventory period is copied to the new inventory period.
- An Inventory Audit Report is created. All sample inventory and book information associated with the old inventory period is copied to the new Inventory Audit Report.

NOTE: When you click the Close Out button, an error message appears if the status of the inventory period is not Active, or if the Physical Count field is empty in any of the sample inventory records.

- 4 Go back to the Inventory Period List page, and open the same inventory period record that you opened in Step 1.

Notice that an inventory audit report has been created as a child of the closed inventory period. The inventory audit report contains a snapshot of the inventory records and the final physical count when the inventory period closes. The inventory audit report and its associated records are locked, cannot be changed, and remain as a historical audit trail for the samples administrator.

Reconciling an Inventory Period

Sales representatives are required to reconcile their samples at least once a year. You can start reconciliations at various times during the year, but only on inventory periods that have been closed. All transactions associated with an inventory period must be completed before the inventory period can be fully reconciled.

Reconciling an inventory period is the final step in [Process of Reconciling the Inventory](#) (on page 453).

Before you begin. To reconcile an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To reconcile an inventory period

- 1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want to reconcile.

The inventory period that you open must be closed. You can reconcile a period only if there is no difference between the physical count and the amount that Oracle CRM On Demand calculates, and if there are no pending transactions in the inventory period.

- 2 Click Reconcile.

An error message is displayed if any of the following conditions are true:

- There are transactions associated with the inventory period that have a status of In Progress.
- There are previous inventory periods that are still open.
- The variance is not within an acceptable limit. Currently, the variance is set to zero.

- 3 Go back to the Inventory Period List page, and open the same inventory period record that you opened in Step 1. If the reconciliation is successful, the Reconciled flag is selected.

NOTE: End users must create transfer transactions for any samples transferred to another representative or returned to headquarters for the period before the reconciliation. Also, mobile users must synchronize their local database with the server database before submitting an inventory count. This synchronization is important if they are recording samples received in a prior period, or if they are recording samples received in a period that has not become active yet.

Inventory Period Fields

Use the Inventory Period Edit page to add an inventory period or update details for an existing inventory period. The Inventory Period Edit page shows the complete set of fields for an inventory period.

TIP: You can also edit inventory periods on the Inventory Period List page and the Inventory Period Detail page. For more information about updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the inventory period fields. Most of these fields are read only for sales representatives, but editable for sample administrators. The Active field and the Reconciled field are automatically set by Oracle CRM On Demand according to whether or not an inventory period has completed or been reconciled.

Field	Description
Start Date	The start date for this inventory period.
End Date	The date that this inventory period expires.
Active	<p>This check box is automatically set by Oracle CRM On Demand and indicates whether the inventory period is active or closed:</p> <ul style="list-style-type: none"> ■ If selected, then this inventory period is currently active. All current dropped samples and promotional items use this active inventory period for processing. ■ If not selected, then this inventory period has completed, or has been closed out, and is inactive. <p>For more information, see Closing Out an Inventory Period (on page 448).</p>
Owner	The owner of this inventory period.
Created	The date and user who created this inventory period.
Modified	The date and user who last modified this inventory period.
Reconciled	<p>Oracle CRM On Demand sets this check box automatically. It indicates whether or not the reconciliation process has been successfully run for this inventory period:</p> <ul style="list-style-type: none"> ■ If selected, then this inventory period has been fully reconciled with no discrepancies, is inactive, and locked. ■ If not selected, then this inventory period has not been successfully reconciled. <p>For more information, see Reconciling an Inventory Period (on page 449).</p>

Related Topics

See the following topics for related information about inventory periods:

- [Inventory Period](#) (on page 441)
- [Managing Inventory Periods](#) (on page 444)
- [Working with the Inventory Period Homepage](#) (on page 442)

Sample Inventory

Use the Sample Inventory pages to create, update, and track sample inventory records.

A *sample inventory* record tells the sales representative about the product that has been categorized as qualifying for dropping a sample. The samples administrator approves the product and assigns a quantity to the sales representative. The sales representative can keep the sample until she can distribute it to a validated physician, clinic, or hospital facility. A sample inventory record can be defined at the product level or at the sample lot level. Rules about the quantity that can be distributed to any given contact are kept in the allocation record for that product sample. The allocation record and the sample inventory record track the process of executing a sales call and dropping a sample or promotional item.

About the Tracking Process for Sample Inventory Records

When the samples administrator sends sample shipments to end users in the field, the sales representative must acknowledge receipt of the sample inventory. The sales representative must physically receive the sample inventory, count it, and acknowledge the quantity. This process forms the starting point for the sample inventory tracking process, and ultimately results in reconciling the inventory at the end of the inventory period.

During an inventory period, the sales representative might have requests from the samples administration manager to perform audits on an inventory. Then, the sales representative uses the sample inventory records to generate an inventory audit report. When an inventory period ends, the inventory is counted and maintained in the sample inventory record and the remaining inventory is copied to the new inventory period. Reconciling the inventory period confirms that the inventory matches the calculations obtained by processing the transaction records for the products. All records must match before the inventory period is considered to be *reconciled*.

Managing Sample Inventory

For step-by-step procedures for managing sample inventory, see:

- [Calculating a Running Total of the Sample Inventory](#) (on page 452)
- [Acknowledging Receipt of the Sample Inventory](#) (on page 452)
- [Process of Reconciling the Inventory](#) (on page 453)
- [Adding Sample Inventory to an Inventory Period](#) (on page 444)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related, sample inventory information:

- [Sample Inventory](#) (on page 451)
- [Sample Inventory Fields](#) (on page 454)

Calculating a Running Total of the Sample Inventory

At the beginning of an inventory period, a sales representative can have *quantity n* of *product x*. During the inventory period, the sales representative performs various transaction tasks (for example: transfers in, transfers out, sample drops, adjustments, and acknowledgements). As each transaction task is started and completed, Oracle CRM On Demand updates the running count for product x.

Based on the sample transaction activity, Oracle CRM On Demand keeps a record of the current count for all products by calculating the *representative inventory balance*. To calculate the representative inventory balance, Oracle CRM On Demand takes the quantity of product x at the beginning of each inventory period and does the following:

- Adds shipment acknowledgements
- Adds sample transactions of the type, Transfer In
- Subtracts sample transactions of the type, Transfer Out
- Subtracts sample transactions of the type, Disbursement (a drop sample transaction)
- Subtracts sample transactions of the type, Return
- Adds or subtracts sample transactions depending on the type of Inventory Adjustment and the value in the quantity field. A negative number is acceptable to indicate a loss, theft, or human error.

Before you begin. To view the running count of the sample inventory, the System Count field must be displayed on the Sample Inventory Detail and Sample Inventory Edit page. By default, the System Count field is not displayed, so contact your samples administrator to configure the field setup for sample inventory pages. For more information about field management, see [Record Type Application Customization Page](#) (on page 1031).

To view the quantity at last physical count

- 1 On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.
- 2 On the Inventory Period Detail page, go to the Sample Inventory section.

For each Sample Inventory line item, the value in the Last Physical Count field shows the quantity of the inventory at the time that the last inventory audit report was run. The System Count field shows the initial sample quantity that was transferred by headquarters to the sales representative. For more information about the fields on this page, see [Sample Inventory Fields](#) (on page 454).

Acknowledging Receipt of the Sample Inventory

When the samples administrator sends samples to end users in the field, when end users exchange samples, or when end users return samples to headquarters, the recipient of the transaction must acknowledge receipt of the sample inventory. The recipient must physically receive the sample inventory, count it, and

acknowledge the quantity. This step is the starting point for tracking sample inventory and ultimately results in reconciling sample inventory at the end of the period.

Oracle CRM On Demand Samples Management supports the electronic movement of sample inventory through the process of [Creating a Samples Transfer](#) (on page 462). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory to the recipient's active inventory period.

End users can acknowledge full or partial receipt of a samples transfer. For more information, see the following:

- [Acknowledging Full Receipt of a Samples Transfer](#) (on page 463)
- [Acknowledging Partial Receipt of a Samples Transfer](#) (on page 464)

Before you begin. To acknowledge receipt of the sample inventory, your user role must include the Enable Basic Samples Operations privilege.

NOTE: When acknowledging receipt of the sample inventory, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records.

Process of Reconciling the Inventory

This topic describes how to reconcile the inventory.

Before you begin. Do the following:

- Your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.
- Meet the following requirements:
 - **Verify that previous inventory periods are reconciled.** Users must reconcile previous inventory periods in chronological order. This requirement is a concern only if a company's configuration allows more than one inactive, unreconciled period.
 - **Acknowledge the receipt of inventory transfers.** Users must send acknowledgements for all received sample inventory shipments.
 - **Create transfer transactions for transferred samples.** Users must create transfer transactions for any samples transferred to another representative or returned to headquarters.
 - **Mobile users must synchronize with the server database.** Mobile users must synchronize their local database with the server database before submitting an inventory count. This requirement is important if they are recording samples received in a previous period.

Restrictions That Apply When Reconciling the Inventory

Note the following restrictions:

- The counts for transferred and received samples are not reflected in the inventory count until their records have been submitted.
- An inventory period cannot be reconciled if any discrepancy exists between physical counts of the inventory and electronic counts of the inventory. If a discrepancy exists, it must be corrected before a user can reconcile the period.

To reconcile the inventory, perform the following tasks:

- 1 [Closing Out an Inventory Period](#) (on page 448)
- 2 [Correcting Physical and Electronic Count Discrepancies](#) (on page 468)
- 3 [Reconciling an Inventory Period](#) (on page 449)

Sample Inventory Fields

Use the Sample Inventory Edit page to add a new sample inventory record to an inventory period, or update details for an existing, sample inventory record. The Sample Inventory Edit page shows the complete set of fields for a sample inventory.

TIP: You can also edit a sample inventory on the Sample Inventory List page and the Sample Inventory Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the sample inventory fields.

Field	Description
Sample	The product associated with this sample inventory record. NOTE: When creating a new sample inventory record, only products that are categorized as samples (that is, products of category type Samples Dropped) can be entered in this field.
Lot #	The lot number associated with the sample product selected. This field is optional. NOTE: When adding or updating a sample inventory record, click the Lookup icon to select a sample lot. Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection. For more information about sample lots, see Sample Lots (on page 486) and Sample Lot Fields (on page 488).
Opening Balance	The initial quantity received from headquarters at the beginning of the inventory period.
Last Physical Count	The quantity of inventory at the time that the latest inventory audit report was run.
Physical Count	A physical count of the balance on hand. The sales representative enters this value. NOTE: This is the only field that the sales representative can modify.
System Count	The initial quantity transferred by headquarters to the sales representative. For more information about viewing a running count of the sample inventory, see Calculating a Running Total of the Sample Inventory (on page 452).

Field	Description
	NOTE: By default, the System Count field is not displayed on the Sample Inventory Detail page and Sample Inventory Edit page, so contact your samples administrator to configure the field setup for sample inventory pages.
Difference	The difference between the value in the Physical Count field and the value in the Last Physical Count field. Oracle CRM On Demand automatically populates this field whenever an inventory period is closed out. For more information see, Closing Out an Inventory Period (on page 448).
Lot #: Expiration Date	The date on which the sample is set to expire. This date is relevant if using a sample lot to track sample inventory records.
Lot #: CutOffDate	A calculated date upon which the sample will expire. The formula to calculate the lot number cutoff date is as follows: Expiration Date minus the number of Short Days equals the Cut Off Date.
Created	The date, timestamp, and user who created this sample inventory record.
Modified	The date, timestamp, and user who last modified this sample inventory record.

Related Information

See the following topics for related information about sample inventories:

- [Sample Inventory](#) (on page 451)
- [Managing Sample Inventory](#) (on page 451)
- [Adding Sample Inventory to an Inventory Period](#) (on page 444)

Inventory Audit Report

Use the Inventory Audit Report pages to create and track inventory audit reports.

An *inventory audit report* is generated by Oracle CRM On Demand when a sales representative creates an interim or final audit count for the inventory period. Administrators and sales representatives can view previously submitted inventory counts (interim and final close-out periods) on the Inventory Audit Report List page.

The inventory audit report is a useful tool for sample compliance administrators to check that samples are being distributed appropriately by individual sales representatives. Inventory audit reports allow compliance administrators to meet certain regulatory requirements during the year. When the inventory audit report has been created you cannot change it.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking inventory audit report information, the Inventory Audit Report tab might be excluded from your setup.

Managing Inventory Audit Reports

For step-by-step procedures for managing inventory audit reports, see:

- [Requesting an Interim Inventory Count](#) (on page 447). An interim audit count is a request to count the inventory and generate an inventory audit report.
- [Closing Out an Inventory Period](#) (on page 448). End users must count and log the final physical count for each sample and submit the final audit report. Closing out an inventory period automatically triggers the creation of the final inventory audit report.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Attaching Files to Records through Attachment Fields](#) (on page 98)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about inventory audit reports:

- [Inventory Audit Report](#) (on page 455)
- [Inventory Audit Report Fields](#) (on page 456)
- [Creating an Inventory Audit Report for an Inventory Period](#) (on page 446)

Inventory Audit Report Fields


Use the Inventory Audit Report List page to view inventory audit report records. After an inventory audit report has been created or generated, you cannot modify or change it.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the inventory audit report fields.

Field	Description
Key Inventory Audit Report Information	
Type	The type of inventory audit report, which can be one of the following: <ul style="list-style-type: none">■ Closeout Inventory Count. This type of inventory audit report closes out

Field	Description
	<p>an inventory period by counting and logging the final physical count for each sample. You can close out only active inventory periods (for more information, see Closing Out an Inventory Period (on page 448)).</p> <ul style="list-style-type: none"> ■ Interim Inventory Count. This type of inventory audit report counts your physical inventory at any time during the active, unreconciled inventory period. Only active inventory periods are considered when you request an interim inventory count (for more information, see Requesting an Interim Inventory Count (on page 447)).
Status	<p>The status of the inventory audit report describes the state of the record and can be one of the following:</p> <ul style="list-style-type: none"> ■ In Progress. The initial state of an inventory audit report. ■ Submitted. The inventory audit report has been reviewed by the sales representative and submitted to his or her manager for approval. ■ Rejected. The inventory audit report was reviewed by the sales representative's manager and has been rejected as incomplete or inaccurate. ■ Approved. The inventory audit report was reviewed by the sales representative's manager and was accepted as a valid accounting of inventory. ■ Cancelled. The inventory audit report did not follow the approval process and was cancelled.
Reason	<p>The reason the inventory audit report is required, which can be one of the following:</p> <ul style="list-style-type: none"> ■ Annual. Select this option if you are generating a standard interim inventory count for the past year. ■ Annual - Close Out. Select this option if you are generating the standard closeout inventory count for the year. ■ For Cause. Select this option if you are generating an ad hoc interim inventory count as requested by the samples administrator. ■ For Cause - Close Out. Select this option if the samples administrator requests that you generate a closeout inventory count outside of the expected inventory period. ■ Special - Interim. Select this option if the samples administrator requests that you generate an ad hoc inventory audit report. ■ Weekly - Interim. Select this option if you are generating an interim inventory count for the past week. ■ Monthly - Interim. Select this option this option if you are generating an interim inventory count for the past month. ■ Termination - Close Out. Select this option if the sales representative has been terminated and a separate party is counting the remaining inventory.

Field	Description
Comments	Additional comments entered about the inventory audit report.
Reported Date	The date that the report was generated.
Completed Date	The date that the report received final approval.
Attachment	<p>If this field is exposed on the page, you can attach a file to the inventory audit report. The field initially shows a paper clip icon on the record Edit page:</p>  <p>You can attach a file to the inventory audit report by clicking the paper clip icon on the record Edit page and then selecting the file that you want to upload.</p> <p>After the file is uploaded and the record is saved, the Attachment field on the record Detail page shows the name and size of the attachment file. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file.</p> <p>You can attach only one file to each inventory audit report record.</p> <p>For instructions on attaching files to records through the Attachment field, and information about the restrictions on file sizes and file types, see Attaching Files to Records through Attachment Fields (on page 98).</p>
Key Inventory Period Information	
Inventory Period	The inventory period that the audit report is associated with.
Owner	The sales representative who runs the inventory audit report and who owns the inventory records.
Created	The user, date, and timestamp when the report was generated.
Modified	The user, date, and timestamp when the report was approved or rejected.

Related Topics

See the following topics for related information about inventory audit reports:

- [Inventory Audit Report](#) (on page 455)
- [Managing Inventory Audit Reports](#) (on page 456)
- [Creating an Inventory Audit Report for an Inventory Period](#) (on page 446)

Sample Transactions

Use the Sample Transaction pages to create, update, and track sample transactions and associated transaction items for samples.

A *sample transaction* is a record for a sample transfer, receipt, sample drop, or inventory adjustment. Oracle CRM On Demand assigns each sample transaction record a unique identifier for tracking purposes. You create a sample transaction so that all movement of samples and promotional items can be reported and reconciled at the end of an inventory period, and a running count of inventory products can be maintained during an inventory period. Each sample transaction record represents a single transaction that can consist of one or more line item entries (transaction items). Transactions are associated with the appropriate inventory period depending on their transaction date. All sample drop and promotional item drop activity generates a disbursement transaction (drop sample transaction). Transferring inventory to and from headquarters and sales representatives generates two transaction records:

- One for the *transfer out* for the sending entity
- One for the *transfer in* for the entity that receives the sample

Sales representatives or headquarters can create adjustment transactions to account for discrepancies in inventory due to loss, theft, returns, found, or human error. When sample transactions have a status of Submitted, no changes can be made to the transaction information. If a change is required, you must generate a new transaction adjustment.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking sample transaction information, the Sample Transaction tab might be excluded from your setup.

Working with the Sample Transaction Homepage

The Sample Transaction Homepage is the starting point for managing sample transactions.

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

Before you begin. To work with sample transactions, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Creating a Sample Transaction

You can create a new sample transaction by clicking the New button in the Recently Modified Sample Transactions section. For more information, see [Creating Records](#) (on page 38) and [Sample Transaction Fields](#) (on page 473).

You can create the following types of sample transactions:

- **Sent transactions.** For more information, see [Creating a Samples Transfer](#) (on page 462).
- **Adjustment transactions.** For more information, see [Adjusting Sample Transactions](#) (on page 465).
- **Lost and found transactions.** For more information, see [Creating Lost and Found Sample Transactions](#) (on page 467).

You cannot create the following types of sample transactions because Oracle CRM On Demand generates them automatically whenever sales representatives drop samples during sales calls:

- **Disbursement transactions.** You can view disbursement transactions. If changes are required for a disbursement transaction, you must create a new inventory adjustment transaction. For more information, see [Viewing Disbursement Transactions](#) (on page 467).
- **Received transactions.** End users must acknowledge the receipt of samples. If a sales representative receives a quantity of samples that was different from the quantity sent to her, an inventory adjustment transaction must be created to record the discrepancy. For more information, see [Acknowledging Receipt of the Sample Inventory](#) (on page 452).

Working with Sample Transaction Lists

The Sample Transaction List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for sample transactions.

Sample Transaction List	Filters
All Sample Transactions	All sample transactions to which you have visibility, regardless of who owns the sample transaction.
Adjustment Transactions	All sample transactions with your name in the Owner field that are of the type, Inventory Adjustment.
Disbursement Transactions	All sample transactions with your name in the Owner field that are of the type, Disbursement.
Discrepancy Transactions	All sample transactions with your name in the Owner field that have a status of Processed with Discrepancy.
Lost Transactions	All sample transactions with your name in the Owner field that are of the type, Inventory Adjustment, with a reason of Lost.
Received Transactions	All sample transactions with your name in the Owner field that are of the type, Transfer In.
Recently Modified Sample Transactions	All sample transactions with your name in the Owner field, sorted by the modified date.
Sent Transactions	All sample transactions with your name in the Owner field that are of the type, Transfer Out.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Transactions

The Recently Modified Sample Transactions section shows the sample transactions most recently modified. Click the Show Full List link to expand the list.

Adding Sections to Your Sample Transaction Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Sample Transaction Homepage:

- Recently Created Sample Transactions
- Recently Modified Sample Transactions
- My Recently Created Sample Transactions
- My Recently Modified Sample Transactions

To add sections to your Sample Transaction Homepage

- 1 On the Sample Transaction Homepage, click Edit Layout.
- 2 On the Sample Transaction Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Related Topics

See the following topics for related information about sample transactions:

- [Sample Transactions](#) (on page 458)
- [Sample Transaction Fields](#) (on page 473)
- [Managing Sample Transactions](#) (on page 461)

Managing Sample Transactions

For step-by-step procedures for managing sample transactions, see:

- [Creating a Samples Transfer](#) (on page 462)
- [Acknowledging Full Receipt of a Samples Transfer](#) (on page 463)
- [Acknowledging Partial Receipt of a Samples Transfer](#) (on page 464)
- [Adjusting Sample Transactions](#) (on page 465)
- [Creating Lost and Found Sample Transactions](#) (on page 467)
- [Viewing Disbursement Transactions](#) (on page 467)
- [Adding Transaction Items to a Sample Transaction](#) (on page 468)
- [Correcting Physical and Electronic Count Discrepancies](#) (on page 468)

- [Dropping Samples During a Sales Call](#) (on page 469)
- [Checking Electronic Signatures](#) (on page 471)
- [Monitoring Sample Activities](#) (on page 472)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Attaching Files to Records through Attachment Fields](#) (on page 98)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

- [Sample Transactions](#) (on page 458)
- [Working with the Sample Transaction Homepage](#) (on page 459)
- [Sample Transaction Fields](#) (on page 473)
- [Transaction Item Fields](#) (on page 478)

Creating a Samples Transfer

A *samples transfer* is a sent transaction of the type Transfer Out or Return. You create a samples transfer whenever product samples are exchanged within your company. This procedure can be used by:

- A samples administrator to send shipments to end users in the field
- End users to exchange samples between themselves
- End users to return samples to headquarters

After a samples transfer has been submitted in Oracle CRM On Demand, the recipient receives a samples transfer of type Transfer In. After the recipient acknowledges the receipt of the transaction, Oracle CRM On Demand enters the new inventory in the inventory count and decreases the inventory items from the sender's inventory records.

Before you begin. To create a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To create a transfer out or return record

- 1 On the Sample Transaction List page, click New.
- 2 On the Sample Transaction Edit page, set Transaction Type to Transfer Out or Return:
 - **Transfer Out.** Indicates that you are transferring samples to another user.
 - **Return.** Indicates that you are returning samples to headquarters. Samples are typically returned because they have expired or are damaged products that must be destroyed.
- 3 Set the status to In Progress.
- 4 Enter the name of the person who will receive the sample in the Transfer To field.
- 5 Complete the remaining fields on the Sample Transaction Edit page as required (see [Sample Transaction Fields](#) (on page 473) for more information), and then click Save.
- 6 Add at least one transaction item line item, as described in [Adding Transaction Items to a Sample Transaction](#) (on page 468).
- 7 Add or modify the books associated with the record as required.
- 8 Click Submit.

If there are no errors, the status of this new transfer out or return transaction record changes to In Transit, and Oracle CRM On Demand automatically creates a new recipient transaction record where the transaction type is Transfer In and the status is In Transit.

Any book information associated with the transfer out or return transaction is copied to the new recipient transaction.

The new received transaction record inherits all the transaction item line items from the transfer out or return transaction record.

Acknowledging Full Receipt of a Samples Transfer

Oracle CRM On Demand supports the electronic movement of sample inventory. For more information, see [Creating a Samples Transfer](#) (on page 462). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory into the recipient's active inventory period.

End users can acknowledge full receipt of a samples transfer as described in the following procedure, or partial receipt of a samples transfer as described in [Acknowledging Partial Receipt of a Samples Transfer](#) (on page 464).

When acknowledging receipt of a samples transfer, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records accordingly.

Before you begin. To acknowledge receipt of a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To acknowledge full receipt of a samples transfer

- 1 On the Sample Transaction Homepage, click Received Transactions in the Sample Transaction List section.
- 2 On the Sample Transaction List page, drill down on the Name field to open the transaction that you want to acknowledge.

The transaction that you open must be of type Transfer In and have a status of In Transit.

- 3 Review the details of the transaction, and in the Transaction Items section, enter values in the Received Quantity fields to reflect the quantity of sample products received.

The Shipped Qty field shows the quantity of items shipped and is a read-only field.

- 4 Click Acknowledge.

If there is no difference between the received and shipped quantities, then the status of the transaction changes to Processed, and you have acknowledged full receipt of the samples transfer.

If there is a difference between the received and shipped quantities, then you have the option to either close the transaction with a discrepancy, or keep the transaction open with a status of Partially Received. For more information, see [Acknowledging Partial Receipt of a Samples Transfer](#) (on page 464).

NOTE: The quantities of samples transferred do not appear in end users inventory counts until they acknowledge receipt of the samples.

Acknowledging Partial Receipt of a Samples Transfer

Oracle CRM On Demand supports the electronic movement of sample inventory. For more information, see [Creating a Samples Transfer](#) (on page 462). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory to the recipient's active inventory period.

End users can acknowledge full receipt of a samples transfer as described in [Acknowledging Full Receipt of a Samples Transfer](#) (on page 463), or partial receipt of a samples transfer as described in the following procedure.

When acknowledging receipt of a samples transfer, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records accordingly.

Before you begin. To acknowledge receipt of a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To acknowledge partial receipt of a samples transfer

- 1 On the Sample Transaction Homepage, click Received Transactions in the Sample Transaction List section.
- 2 On the Sample Transaction List page, drill down on the Name field to open the transaction that you want to acknowledge.

The transaction that you open must be of the type Transfer In and have a status of In Transit.

- 3 Review the details of the transaction, and in the Transaction Items section, enter values in the Received Quantity fields to reflect the quantity of sample products received.

The Shipped Qty fields shows the quantity of items shipped and is a read-only field.

- 4 Click Acknowledge.

If there is a difference between the received and shipped quantities, then an error message appears indicating that there is a difference in the transfer amounts.

- 5 Do one of the following:

- Click OK to close the transaction with a discrepancy.

In this case, a discrepancy transaction is automatically generated by Oracle CRM On Demand with a status of Processed with Discrepancy.

- Click Cancel to leave the transaction open with a status of Partially Received.

If there is no difference between the received and shipped quantities, then the status of the transaction changes to Processed, and you have acknowledged full receipt of the samples transfer.

NOTE: The samples transfer quantities do not appear in end users inventory counts until they acknowledge receipt of the samples.

Adjusting Sample Transactions

Sales representatives must track inventory and make sure that each sample is accounted for during the reconciliation. The adjustment feature allows samples administrators and end users to adjust inventory counts of samples by adjusting past, sample transactions (transactions that have already been processed). Common reasons for adjusting past, sample transactions include: product loss, product thefts, counting errors, or data entry errors. You can add products or adjust quantities for any type of sample transaction (transfer, lost, stolen, received, drop sample transaction or disbursement, and so on). You use adjustments to reconcile the original quantity from the samples administrator record with the quantity that exists when the sales representative counts the physical inventory.

You can adjust any transaction of any type that has a transaction status of Processed. After an existing transaction has been processed, you cannot adjust it again. You must create a new inventory adjustment record. For more information, see the following topics:

- [Adjusting an Existing Inventory Adjustment Record](#) (on page 465)
- [Creating a New Inventory Adjustment Record](#) (on page 466)

Before you begin. To create adjustments (sample transactions of the type, Inventory Adjustment), your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Adjusting an Existing Inventory Adjustment Record

You can adjust any transaction of any type that has a transaction status of Processed. After an existing transaction has been processed, you cannot adjust it again. You must create a new adjustment record, see [Creating a New Inventory Adjustment Record](#) (on page 466).

Before you begin. To adjust existing inventory adjustment records, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To adjust an existing inventory adjustment record

- 1** On the Sample Transaction List page, open a transaction of type Inventory Adjustment with a transaction status of Processed.
- 2** Add or modify the books associated with the record, as required.
- 3** Click Adjust.
This step creates a new transaction of type Inventory Adjustment with a status of In Progress.
All transaction item line items are copied to the new record. Any book information associated with the original transaction is copied to the new transaction.
- 4** Modify the key transaction information, as required.
For more information about the fields in this section of the page, see [Sample Transaction Fields](#) (on page 473).
- 5** Modify the transaction items, as required.
For example, you can modify the quantity for an existing transaction item line item, add a new transaction item line item, or delete an existing transaction item line item. For more information about the fields in this section of the page, see [Transaction Item Fields](#) (on page 478).
- 6** Click Submit to submit the new inventory adjustment transaction record.
If there are no errors, the status of the new inventory transaction record changes to Submitted.

Creating a New Inventory Adjustment Record

To resolve discrepancies between physical counts of the inventory and electronic counts of the inventory, end users and samples administrators must create and submit adjustment transactions. Sales representatives and samples administrators record changes to their sample transactions by creating new sample transaction records of the type, Inventory Adjustment.

Before you begin. To create inventory adjustment records, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To create a new inventory adjustment record

- 1** On the Sample Transaction List page, click New.
- 2** On the Sample Transaction Edit page, set Transaction Type to Inventory Adjustment.
- 3** Enter a reason in the Reason field, for example, Lost samples, Found samples, or Initial Count.
- 4** Complete the remaining fields on the Sample Transaction Edit page as required, and then click Save.
For more information about the fields on this page, see [Sample Transaction Fields](#) (on page 473).
- 5** Add at least one transaction item line item, as described in [Adding Transaction Items to a Sample Transaction](#) (on page 468).

- 6 Click Submit.

Creating Lost and Found Sample Transactions

Sales representatives can record any lost or found sample transactions that they notice in their inventory by creating new lost and found sample transaction records.

Before you begin. To create lost and found sample transactions, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To create a new lost or found sample transaction record

- 1 On the Sample Transaction List page, click New.
- 2 On the Sample Transaction Edit page, set Transaction Type to Inventory Adjustment.
- 3 Enter a reason in the Reason field, for example: Lost or Found.
- 4 Complete the remaining fields on the Sample Transaction Edit page as required, and then click Save.
For more information about the fields on this page, see [Sample Transaction Fields](#) (on page 473).
- 5 Add at least one Transaction Item line item.
For more information, see [Adding Transaction Items to a Sample Transaction](#) (on page 468).
- 6 Click Submit.

Viewing Disbursement Transactions

End users cannot create disbursement transactions (drop sample transactions). Oracle CRM On Demand automatically generates disbursement transactions whenever sales representatives drop samples during sales calls.

NOTE: End users cannot create received transactions either. Oracle CRM On Demand automatically generates transfer in transactions whenever sales representatives return previously dropped samples or transfer out samples to headquarters or another sales representative.

Before you begin. To view disbursement transactions, your user role must include the Enable Basic Samples Operations privilege.

To view disbursement transactions

- 1 On the Sample Transaction Homepage, click Disbursement Transactions in the Sample Transaction List section.
- 2 On the Sample Transaction List page, drill down on the Name field to open the disbursement transaction that you want to view.

- 3 On the Sample Transaction Detail page that is displayed, review Key Transaction Information, Key Contact Information, and Transaction Items information.

For more information about the fields on this page, see [Sample Transaction Fields](#) (on page 473).

End users cannot update or change any of the information on this page. If any modifications or corrections are required for a disbursement transaction, a new inventory adjustment transaction must be created, see [Creating a New Inventory Adjustment Record](#) (on page 466).

NOTE: In a similar way, you can also view received transactions by selecting the appropriate option from the Sample Transaction List.

Adding Transaction Items to a Sample Transaction

Use the Sample Transaction Edit page to add a transaction item line item to a sample transaction, or update the details for an existing transaction item line item in a sample transaction.

Before you begin. To add transaction items to sample transactions, your user role must include the Enable Basic Samples Operations privilege.

To add a transaction item to a sample transaction

- 1 On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.
- 2 On the Sample Transaction Detail page, click New in the Transaction Items section.
- 3 On the Transaction Item Edit page, complete the required fields. Click Save.

For more information about the fields on this page, see [Transaction Item Fields](#) (on page 478).

Related Topics

See the following topics for related information about transaction items:

- [Transaction Items](#) (on page 476)
- [Managing Transaction Items](#) (on page 477)
- [Transaction Item Fields](#) (on page 478)

Correcting Physical and Electronic Count Discrepancies

To correct discrepancies between physical counts of the inventory and electronic counts of the inventory (as recorded by Oracle CRM On Demand when samples were transferred), samples administrators and end users must create and submit adjustment transactions.

Correcting physical and electronic count discrepancies is also an important step in [Process of Reconciling the Inventory](#) (on page 453).

Before you begin. To correct discrepancies between physical counts of the inventory and electronic counts of the inventory, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Samples administrators and sales representatives can use one or all of the following options to correct discrepancies between physical counts of the inventory and electronic counts of the inventory:

- Creating and submitting a sample adjustment transaction with one or more line items. For more information, see [Creating a New Inventory Adjustment Record](#) (on page 466).
- Adjusting the line item records of previously entered transactions that have not yet been submitted. For more information, see [Adjusting an Existing Inventory Adjustment Record](#) (on page 465).

Dropping Samples During a Sales Call

During a sales call, sales representatives take samples from their inventory and drop them to physicians, pharmacists, clinics, hospitals, and other appropriate contacts. The sales representative must do the following:

- Count each sample that was dropped.
- Verify that the sample is appropriate for the physician and his or her specialty.
- Capture authorized signatures to complete the transaction.

Only products that are categorized as samples (that is, products of category type Samples Dropped or Promotional Items Dropped), which have been allocated to and are present in the sales representative's inventory can be dropped.

Before you begin. To drop samples during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To drop samples during a sales call

- 1 On the Contacts Homepage, open the contact to whom you want to drop samples.
- 2 On the Contact Detail page in the Calls section, click New Call or Auto Call to add a new line item.
 - Clicking New Call brings you to the Call Edit page where you must enter most information manually for the new call record.

Make sure that you specify Call in the Type field. Otherwise, the following related items will not be available to you: Samples Dropped, Promotional Items, Products Detailed.
 - Clicking Auto Call brings you to the Call Detail page where the following field data is filled automatically in for the new call record.
 - The Status field has a value of Planned.
 - The End Date field has a value equal to the Start Date plus 30 minutes.
 - The Type field has a value of Call.
- 3 On the Call Edit or Call Detail page, do the following:
 - a To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.

- b** Enter or update the information.

For more information about the fields on the Call Edit and Call Detail page, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126).

- c** Click Save in the case of the Call Edit page.

- 4** On the Call Detail page in the Samples Dropped section, click New.

- 5** On the Sample Dropped Edit page, click the Lookup icon in the Product field and select a product.

NOTE: Only products of type Samples Dropped (or Promotional Items Dropped if dropping promotional items), which have been allocated to and are present in the sales representative's inventory and are active on the current call date, are available to select.

- 6** Click the Lookup icon in the Lot number (#) field, and select the appropriate lot number for the product selected.

NOTE: Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection. You can skip this step if you are not using lot numbers to track samples.

- 7** Enter the quantity of the sample that you want to drop in the Quantity field. Then click Save.

Provided that all of the following conditions are true when you click Save, then Oracle CRM On Demand generates a *Disbursement* transaction with a line item for each dropped sample for the call, and submits the disbursement transaction to update the sample inventory. If the disbursement transaction is successful, Oracle CRM On Demand changes the status of the call to Submitted.

- All samples exist in the sample inventory for the period indicated by the date and time for the call.
- The period in which the samples are recorded is an unreconciled period. An error message appears if it is a reconciled period.
- A valid lot number is specified for dropped samples that are tracked by lot numbers.
- The quantity value that you enter is not greater than the maximum quantity allowed to drop for a call.
- The maximum quantity allowed to drop during the allocation period is not exceeded when you enter the quantity value.

NOTE: You drop promotional items in a similar way by clicking New in the Promotional Items section of the Call Detail page. You handle products detailed line items in a similar way by clicking New in the Products Detailed section of the Call Detail page.

Related Topics

See the following topics for related information about sample drops:

- [Allocations](#) (on page 481)
- [Managing Allocations](#) (on page 483)
- [Allocation Fields](#) (on page 485)
- [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126)

About Electronic Signatures

Oracle CRM On Demand can store signature data securely, in image format, for dropped samples. Signature images are stored in Oracle CRM On Demand, using standard image formats. The signature image is a series of x- and y-coordinates or strings, which can be stored in the Oracle CRM On Demand database.

Each call activity recorded for samples that are dropped during a sales call must have an associated signature image. It is the responsibility of the sales representative who is dropping the samples to obtain an electronic signature from the person (or company) who receives the samples. The signature can be captured on paper or by an external application (such as a mobile handheld device), and then uploaded to Oracle CRM On Demand through the Web services interface. The sales representative must capture the signature when the samples are dropped. The sales representative cannot deliver the samples without capturing an authorized signature.

Administrators and authorized users can view sample signature images on the Signature Detail page, but they cannot create, update, or delete them. The Signature Detail page lists the four most recently captured signatures for samples dropped. Sample administrators must regularly check the signature images on the Signature Detail page to make sure that the signatures collected from each contact are consistent.

NOTE: Access to the sample signature image is controlled so that only designated roles can access and view sample signature images. Only those roles that have been assigned the Signature privilege can access and view signature images.

Checking Electronic Signatures

Use the following procedure to check the signature associated with a call activity for samples that are dropped. This procedure assumes that the Signature record type is exposed as a related item on the Call Detail page. For more information about exposing related item information, see [Customizing Related Item Layouts](#) (on page 1056).

Access to the actual sample signature image is controlled so that only designated roles can access and view sample signature images. Only roles that are assigned the Signature privilege will be able to access and view signature images.

For more information about signatures, see [About Electronic Signatures](#) (on page 471).

Before you begin. To check electronic signatures, your user role must include the Enable Basic Samples Operations privilege and (if required) the Signature privilege.

To check sample signatures

- 1 On the Contacts Homepage, open the contact that you want.
- 2 On the Contact Detail page in the Calls section, drill down on the Subject field to open the call activity record that you want.
- 3 On the Call Detail page in the Signature section, drill down on the Title field to open the sample signature record that you want to view.

NOTE: You cannot edit an existing signature record, or create a new signature record.

- 4 On the Signature Detail Page, you can review the details of the signature.

The following table provides information regarding some of the fields on the Signature Detail page.

Field	Description
-------	-------------

Field	Description
Signature Header	<p>The Signature Header field displays the following information:</p> <ul style="list-style-type: none"> ■ Contact Last Name. The last name of the recipient of the samples. ■ Contact First Name. The first name of the recipient of the samples. ■ Signature Date. The date that the samples were dropped and the date on which the authorized signature was captured. ■ Address. The address of the recipient who receives the samples. ■ Sales Rep First and Last Name. The first and last name of the sales representative who dropped the samples.
Disclaimer Text	<p>The Disclaimer Text field displays the disclaimer text that is associated with the dropped samples. You cannot access or edit the disclaimer text.</p>
Signature Control	<p>Click this button to access the signature image, which displays the following information:</p> <ul style="list-style-type: none"> ■ Sample Signature System ID. The unique identifier associated with the sample signature. ■ Activity ID. The unique identifier of the call activity record with which the sample signature is associated. ■ Call Date. The date that the samples were dropped and the date on which the authorized signature was captured. ■ Disclaimer Text. The disclaimer text associated with the dropped samples. <p>NOTE: Your user role must include the Signature privilege to open and view the signature captured when samples were dropped. If you have not been granted the Signature privilege, then the Signature Control button is disabled.</p>

Monitoring Sample Activities

The samples administrator is responsible for the samples inventory of the company and making sure that it complies with regulatory rules and regulations.

Before you begin. To monitor sample activities, your user role must be assigned administrative responsibilities and must include the following privileges:

- Enable Basic Samples Operations privilege
- Enable Samples Adjustment privilege

To monitor samples activities, click the list that you want to monitor in the Sample Transaction List section on the Sample Transaction Homepage. The following table describes the purpose of each list.

Sample Transaction List	Filters
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Sample Transaction List	Filters
Disbursement Transactions	Shows all samples that were submitted and dropped. Monitoring this list allows the samples administrator to review all samples that have been dropped.
Sent Transactions	Shows all samples that were submitted and transferred. Monitoring this list allows the samples administrator to review all samples returned or shipments transferred between end users.
Received Transactions	Shows all samples that were submitted and received. Monitoring this list allows the samples administrator to review received shipments between end users.
Adjustment Transactions	Shows all adjustment transactions that have been submitted. Monitoring this list allows the samples administrator to review all types of adjustment transactions that have been submitted by end users and samples administrators to reconcile discrepancies between physical counts and records in Oracle CRM On Demand.
Lost Transactions	Shows all lost samples that were submitted as adjustments. Monitoring this list allows the administrator to review the samples that have been lost.

For information on viewing or creating these lists, see [Working with Lists](#) (on page 69) and [Creating and Refining Lists](#) (on page 73).

To view a list, click the list name.

To create a new list, click New.

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Sample Transaction Fields

Use the Sample Transaction Edit page to add a sample transaction, or update details for an existing sample transaction that has a status of In Progress. The Sample Transaction Edit page shows the complete set of fields for a sample transaction.


TIP: You can also edit sample transactions on the Sample Transaction List page and the Sample Transaction Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the sample transaction fields. Depending on the type of sample transaction that you have open (Transfer In, Transfer Out, Inventory Adjustment, Disbursement, Samples Lost), all of these fields might not be applicable.

Field	Description
Key Transaction Information	
Name	The unique identifier of the sample transaction (this is system generated).
Date	<p>The date for the sample transaction.</p> <p>When you enter a date that falls within an active inventory period, the Inventory Period: Start Date and Inventory Period: End Date fields are automatically populated. An error message displays if you enter a date that does not fall within any existing inventory periods, or a date that is greater than the current system date.</p> <p>Sample transactions cannot be created for reconciled periods. An error message displays if you enter a date that falls within a reconciled period or an inactive period.</p>
Type	<p>The type of sample transaction can be one of the following:</p> <ul style="list-style-type: none"> ■ Transfer Out ■ Inventory Adjustment ■ Samples Lost ■ Disbursement ■ Transfer In <p>Transfer Out, Inventory Adjustment, and Samples Lost are user generated transactions; Disbursement and Transfer In are system generated transactions.</p> <p>NOTE: It is critical that you do not customize or change the order of the Type picklist for Sample Transaction Field Setup as the cascading picklist functionality may be affected.</p>
Status	<p>The status of the sample transaction can be one of the following:</p> <ul style="list-style-type: none"> ■ In Progress ■ Submitted ■ Processed with Discrepancies ■ In Transit ■ Processed ■ Adjusted
Expected Delivery Date	The date that the sample is due to be delivered.
Tracking #	A unique number that you and the customer can use to track the delivery of the sample.
# of Packages Sent	The number of packages that are included in the sample.

Field	Description
Transfer To	<p>The person to whom a transfer out transaction is logged. This person receives the sample and must acknowledge receipt of the sample.</p> <p>When creating a transfer out transaction, this is a required field.</p>
Transfer From	The person who is transferring the samples (that is, the person who creates the Transfer Out transaction).
Inventory Period: Start Date	<p>The start date of the inventory period associated with the sample transaction. This is a read-only field, which is automatically populated only when the date that you enter in the Date field falls within an active inventory period.</p> <p>The inventory period restricts the products and sample lot numbers that are available for selection when adding Transaction Item line items. It also ensures that for the selected inventory period, only valid products and sample lot numbers are available for selection.</p>
Inventory Period: End Date	<p>The end date of the inventory period associated with the sample transaction. This is a read-only field, which is automatically populated only when the date that you enter in the Date field falls within an inactive inventory period.</p> <p>The inventory period restricts the products and sample lot numbers that are available for selection when adding Transaction Item line items. It also ensures that for the selected inventory period, only valid products and sample lot numbers are available for selection.</p>
Adjustment Reason	<p>The reason for creating or adjusting the sample transaction. Reason codes include the following:</p> <ul style="list-style-type: none"> ■ Lost ■ Found ■ Theft ■ Human Error ■ Initial Count ■ Request
Comments	The user can enter additional information about the sample transaction in this field.

Field	Description
Attachment	<p>If this field is exposed on the page, you can attach a file to the sample transaction record. The field initially shows a paper clip icon on the record Edit page:</p>  <p>You can attach a file to the sample transaction record by clicking the paper clip icon on the record Edit page and then selecting the file that you want to upload.</p> <p>After the file is uploaded and the record is saved, the Attachment field on the record Detail page shows the name and size of the attachment file. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file.</p> <p>You can attach only one file to each sample transaction record.</p> <p>For instructions on attaching files to records through the Attachment field, and information about the restrictions on file sizes and file types, see Attaching Files to Records through Attachment Fields (on page 98).</p>
Key Contact Information	
<p>NOTE: This read-only information is populated for disbursement transactions only. Oracle CRM On Demand automatically generates disbursement transactions whenever sales representatives drop or disburse samples during a sales call. For more information, see Dropping Samples During a Sales Call (on page 469) and Viewing Disbursement Transactions (on page 467).</p>	
Contact	The full name of the physician or hospital contact to whom the disbursement was made.
Contact First Name	The first name of the contact to whom the disbursement was made.
Contact Last Name	The last name of the contact to whom the disbursement was made.
Contact Type	The contact type.
Contact Account	The account associated with this contact.
Contact Email	The email address for this contact.

Related Information

See the following topics for related, sample transaction information:

- [Sample Transactions](#) (on page 458)
- [Working with the Sample Transaction Homepage](#) (on page 459)
- [Managing Sample Transactions](#) (on page 461)

Transaction Items

Use the Transaction Item pages to create, update, and track transaction items for samples.

A *transaction item* records the details of the sample or promotional items associated with a sample transaction. For each sample transaction, one or more transaction item line items must exist. This information is used to calculate a running count of inventory for the sales representative. Sample transactions are used in the reconciliation process to account for all samples and promotional items that have been assigned to a sales representative.

Managing Transaction Items

For step-by-step procedures for managing transaction items, see:

- [Modifying the Sample in a Transaction Item](#) (on page 477)
- [Modifying the Sample Lot in a Transaction Item](#) (on page 478)
- [Adding Transaction Items to a Sample Transaction](#) (on page 468)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

- [Transaction Items](#) (on page 476)
- [Transaction Item Fields](#) (on page 478)
- [Product Fields](#) (on page 479)

Modifying the Sample in a Transaction Item

Use the Product Edit page to modify the sample in a transaction item. The Product Edit page shows the complete set of fields for a product.

Before you begin. To modify samples in a transaction item, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample in a transaction item

- 1 On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.

NOTE: The transaction record that you open must have a status of In Progress. Transactions that have a status of Submitted cannot be modified.

- 2 On the Sample Transaction Detail page, go to the Transaction Item line item that you want to modify.
- 3 In the Sample field of the Transaction Item line item, click the Lookup icon to select a different sample to associate with the Transaction Item line item, if required.
- 4 In the Sample field of the Transaction Item line item, click the name of the sample, click Edit on the Product Details page, and then modify the fields as required.

For more information, see [Product Fields](#) (on page 479).

Modifying the Sample Lot in a Transaction Item

Use the Sample Lot Edit page to modify the sample lot in a transaction item. The Sample Lot Edit page shows the complete set of fields for a sample lot.

Before you begin. To modify sample lots in a transaction item, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample lot in a transaction item

- 1 On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.
NOTE: The transaction record that you open must have a status of In Progress. Transactions that have a status of Submitted cannot be modified.
- 2 On the Sample Transaction Detail page, go to the Transaction Item line item that you want to modify.
- 3 In the Lot # field of the Transaction Item line item, click the Lookup icon to select a different sample lot to associate with the Transaction Item line item, if required.
NOTE: Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection.
- 4 In the Lot # field of the Transaction Item line item, click the name of the sample lot, click Edit on the Sample Lot Detail page, and then modify the sample lot fields as required (see [Sample Lot Fields](#) (on page 488) for more information).

Transaction Item Fields

Use the Transaction Item Edit page to add a transaction item or update details for an existing transaction item.

TIP: You can also edit transaction items on the Transaction Item Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the transaction item fields.

Field	Description
Line Number	A unique number that is assigned manually to each item.
Sample	The name of the sample or promotional item.
Lot #	<p>The unique number or name assigned to the sample for tracking purposes. A sample might or might not be tracked by a lot number. This field is optional.</p> <p>NOTE: When adding or updating a transaction item, click the Lookup icon to select a sample lot. Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection. For more information about sample lots, see Sample Lots (on page 486) and Sample Lot Fields (on page 488).</p>
Quantity	<p>The quantity of the sample. This field is required.</p> <p>NOTE: If the quantity value is less than the initial quantity of sample inventory transferred from headquarters, then use the minus sign with the numeric value. This field is important for recording adjustments such as loss, theft, or human error.</p>

Related Topics

See the following topics for related information about transaction items:

- [Transaction Items](#) (on page 476)
- [Managing Transaction Items](#) (on page 477)
- [Adding Transaction Items to a Sample Transaction](#) (on page 468)

Product Fields

Use the Product Edit page to define and manage your company's list of products. The Product Edit page shows the complete set of fields for a product. For information about setting up products for your company, see [Setting Up Company Products](#) (on page 1470).

TIP: You can also edit products on the Product Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the product fields.

Field	Description
Key Product Information	

Field	Description
Product Name	The name of the product.
Product Category	<p>The product category, as defined by product administrator at the company. For example, it can be one of the following:</p> <ul style="list-style-type: none"> ■ Samples Dropped ■ Promotional Item Dropped <p>NOTE: Do not change the seed data for the product category. Some filters in Oracle CRM On Demand have been created for Samples Dropped and Promotional Item Dropped. You can add new product categories, which are based on your customer requirements.</p>
Solution	<p>The product image file associated with this product. The image file is used to describe the product during a sales call.</p> <p>NOTE: This field is available with Oracle CRM On Demand Life Sciences Edition and might not be available for your configuration. If you require this field and it is not available, contact your company administrator.</p>
Part #	The manufacturer part number associated with the product. The company specifies the part number.
Orderable	<p>A check box to indicate how the sample product can be ordered:</p> <ul style="list-style-type: none"> ■ If selected, the sample product can be ordered by the sales representative and can be shipped from the company to the physician, clinic, or hospital. ■ If not selected, the sample can be obtained only when the sales representative makes a sample drop.
Type	<p>The type of product can be one of the following:</p> <ul style="list-style-type: none"> ■ Product. A physical item manufactured by the customer. ■ Service. A value added event that provides a service to the customer - could include such items as consulting time. ■ Training. A value added event that provides education to the customer - includes such items as labs, manuals, hands on training, lectures, and so on.

Field	Description
Status	<p>The company defines the product status. The values include the following:</p> <ul style="list-style-type: none"> ■ Available. The product is available for sample transfers and sample drops. ■ Active. There are active sample transfers and drops for this product. ■ Pending. The product is not ready to be dropped but is in the process of being made available. ■ Bundle. A group of products or services have been packaged together and are dependent on each other. ■ Prototype. The product is not ready for general availability but an example of the product can be examined or studied. ■ Terminated. The product is no longer available for sample transfers and sample drops and will not be available in the future. ■ Closed. This means the same as Terminated, except that the product will be available until there is no product left to transfer or drop.
Additional Information	
Description	A description of the product sample.

Allocations

Use the Allocation pages to create, update, and track allocations for a sample.

The samples administrator of a pharmaceutical company defines an allocation record. This allocation record determines the period in which sample products are given to the sales representative to distribute to clinics, hospitals, or physician contacts. Additionally, the allocation information defines the following:

- The number of samples of a particular product that is allowed to be dropped at a particular time
- The maximum number of samples that a sales representative is allowed to distribute to a given location

This feature allows the samples administrator to set those parameters at the product level and communicate this information to all the sales representatives. Using allocations, you can define the allocation period, allocate samples within that allocation period, view the list of samples available for each allocation period, and set the maximum parameters for distributing that sample during that allocation period.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking allocation information, the Allocation tab might be excluded from your setup.

Working with the Allocation Homepage

The Allocation Homepage is the starting point for managing allocations.

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

Before you begin. To work with allocations, your user role must include the Enable Basic Samples Operations privilege.

Creating an Allocation

The samples administrator creates a new allocation by clicking the New button in the Recently Modified Allocations section. For more information, see [Creating Records](#) (on page 38) and [Allocation Fields](#) (on page 485).

Working with Allocation Lists

The Allocation List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for allocations.

Allocation List	Filters
All Allocations	All allocations to which you have visibility, regardless of who owns the allocation.
Recently Modified Allocations	All allocations with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Allocations

The Recently Modified Allocations section shows the allocations that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to your Allocation Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Allocation Homepage:

- Recently Created Allocations
- Recently Modified Allocations

- [My Recently Created Allocations](#)
- [My Recently Modified Allocations](#)
- Additional report sections (Your company administrator can make report sections available for display on your Allocation Homepage.)

To add sections to your Allocation Homepage

- 1 On the Allocation Homepage, click Edit Layout.
- 2 On the Allocation Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about allocations:

- [Allocations](#) (on page 481)
- [Allocation Fields](#) (on page 485)
- [Managing Allocations](#) (on page 483)

Managing Allocations

For step-by-step procedures for managing allocations, see:

- [Allocating Samples to End Users](#) (on page 484)
- [Modifying the Sample in an Allocation](#) (on page 484)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about allocations:

- [Allocations](#) (on page 481)
- [Working with the Allocation Homepage](#) (on page 481)
- [Allocation Fields](#) (on page 485)

Allocating Samples to End Users

Use the Allocation Detail page to allocate samples to an end user.

For adding multiple allocation records, it is recommended that the samples administrator create an import file (mapping end users to product allocations), and then load the data into Oracle CRM On Demand.

Before you begin. To allocate samples to end users, your user role must include the Enable Basic Samples Operations privilege.

To allocate samples to an end user

- 1 On the Allocation List page, drill down on the Allocation Type field to open the allocation record that you want.
- 2 On the Allocation Detail page, click the Lookup icon beside the Owner field, and select the end user. Click Save.

Modifying the Sample in an Allocation

Use the Product Edit page to modify the sample in an allocation. The Product Edit page shows the complete set of fields for a product.

Before you begin. To modify the sample in an allocation, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample in an allocation

- 1 On the Allocation List page, drill down on the Allocation Type field to open the allocation record that you want to modify.
- 2 On the Allocation Detail page in the Sample field, click the Lookup icon to select a different sample to associate with the allocation record, if required.
- 3 On the Allocation Detail page in the Sample field, click the name of the sample, click Edit on the Product Details page, and then modify the fields as required (see [Product Fields](#) (on page 479) for more information).

Allocation Fields

Use the Allocation Edit page to add an allocation or update details for an existing allocation. The Allocation Edit page shows the complete set of fields for an allocation.

TIP: You can also edit allocations on the Allocation List page and the Allocation Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the allocation fields.

Field	Description
Allocation Type	The allocation name is defined by the samples administrator. It must be unique. Some examples include: <ul style="list-style-type: none"> ■ Sample Allocation ■ Promotional Item Allocation
Active	The status of the allocation can be one of the following: <ul style="list-style-type: none"> ■ Active. Indicates that the end date for the allocation period has not yet occurred. ■ Inactive. Indicates that the allocation period has completed and the end date has been reached.
Owner	The owner of this allocation. This is the person to whom the samples administrator assigns the allocation.
Sample	The product sample associated with this allocation. <p>NOTE: When creating a new allocation record, only products that are categorized as samples (that is, products of the category type, Samples Dropped) can be entered in this field.</p>
Max Qty	The maximum quantity allowed to drop for a call.
Allocation Qty	The maximum quantity allowed to drop during the allocation period.
Start Date	The start date for this allocation.
End Date	The end date for this allocation.
Stop Sampling	A check box to indicate whether to continue delivering samples: <ul style="list-style-type: none"> ■ If selected, then sample drops are no longer allowed. ■ If not selected, then sample drops are allowed.
Order By	This field allows sales representatives to view their allocations in a specified order.

Related Topics

See the following topics for related information about allocations:

- [Allocations](#) (on page 481)
- [Working with the Allocation Homepage](#) (on page 481)
- [Managing Allocations](#) (on page 483)

Sample Lots

Use the Sample Lot pages to create, update, and track sample lots.

A product, as it is being manufactured, is given a lot number. Companies use this lot number to track products. Tracking is essential if a particular product has to be recalled, or if a defect is detected during production. Knowing where all their products are located is critical to many companies. Oracle CRM On Demand provides the option to track the samples being dropped using lot numbers. The samples administrator of a company decides whether to use lot numbers.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking sample lot information, the Sample Lot tab might be excluded from your setup.

Working with the Sample Lot Homepage

The Sample Lot Homepage is the starting point for managing sample lots. This page displays information that is relevant to you.

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

Before you begin. To work with sample lots, your user role must include the Enable Basic Samples Operations privilege.

Creating a Sample Lot

You can create a new sample lot by clicking the New button in the Recently Viewed Sample Lots section. For more information, see [Creating Records](#) (on page 38) and [Sample Lot Fields](#) (on page 488).

Working with Sample Lot Lists

The Sample Lot List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for sample lots.

Sample Lot List	Filters
-----------------	---------

Sample Lot List	Filters
All Sample Lots	<p>All sample lots to which you have visibility, regardless of who owns the sample lot.</p> <p>NOTE: Only sample lots that are being tracked by lot number in the inventory are displayed in the All Sample Lots list (see Sample Lot Fields (on page 488) for more information).</p>
Recently Modified Sample Lots	<p>All sample lots with your name in the Owner field, sorted by the modified date.</p> <p>NOTE: Only sample lots that are being tracked by lot number in the inventory are displayed in the Recently Modified Sample Lots list (see Sample Lot Fields (on page 488) for more information).</p>

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Lots

The Recently Modified Sample Lots section shows the sample lots most recently modified.

Click Show Full List to expand the list.

Adding Sections to Your Sample Lot Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Sample Lot Homepage:

- Recently Created Sample Lots
- Recently Modified Sample Lots
- My Recently Created Sample Lots
- My Recently Modified Sample Lots
- Additional report sections (Your company administrator can make report sections available for display on your Sample Lot Homepage.)

To add sections to your Sample Lot Homepage

- 1 On the Sample Lot Homepage, click Edit Layout.
- 2 On the Sample Lot Homepage Layout page, use the directional arrows to add or remove sections, and to organize the sections on the page.

- 3 Click Save.

Related Topics

See the following topics for related information about sample lots:

- [Sample Lots](#) (on page 486)
- [Sample Lot Fields](#) (on page 488)
- [Managing Sample Lots](#) (on page 488)

Managing Sample Lots

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about sample lots:

- [Sample Lots](#) (on page 486)
- [Working with the Sample Lot Homepage](#) (on page 486)
- [Sample Lot Fields](#) (on page 488)

Sample Lot Fields

Use the Sample Lot Edit page to add a sample lot or update details for an existing sample lot. The Sample Lot Edit page shows the complete set of fields for a sample lot.

TIP: You can also edit sample lots on the Sample Lot List page and the Sample Lot Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the sample lot fields.

Field	Description
Lot Number	The specified manufacturing lot number for the product.
Sample	<p>The name of the sample product.</p> <p>NOTE: When creating a new sample lot record, only products that are categorized as samples (that is, products of the category type, Samples Dropped) can be entered in this field.</p>
Start Date	The date that the sample lot became available.
Expiration Date	The date that the sample lot expires.
Short Days	The number of days for which the samples administrator has determined to stop sampling, prior to the expiration date. This numeric value is used in the calculation of the cut-off date.
Cut Off Date	The calculated date on which the sample lot is no longer valid to drop. This date is calculated by Oracle CRM On Demand by subtracting the number of short days from the expiration date.
Status	<p>This is a read-only field, which indicates whether the sample can be fulfilled. The possible values are as follows:</p> <ul style="list-style-type: none"> ■ Good. Indicates that the current date is before the cut-off date ■ Expired. Indicates that the current date is after the expiration date ■ Short Dated. Indicates that the current date is between the expiration date and cut-off date
Inventory by Lot	<p>A check box that indicates whether the sample lot is being tracked on a lot number basis in the inventory. The company administrator defines this field.</p> <ul style="list-style-type: none"> ■ If selected, then this sample lot will be tracked by lot number in the inventory. ■ If not selected, then this sample lot will not be tracked by lot number in the inventory.
Sample: Part #	The sample product number.
Description	A general description of the sample lot.

Related Topics

See the following topics for related information about sample lots:

- [Sample Lots](#) (on page 486)
- [Working with the Sample Lot Homepage](#) (on page 486)
- [Managing Sample Lots](#) (on page 488)

Sample Disclaimer

Use the Sample Disclaimer pages to create, update, and track disclaimers for a company. When a sales representative captures a signature for a sample that has been dropped, the corporate disclaimer is presented to the physician to view.

A *sample disclaimer* is the text that is displayed to deny responsibility for certain adverse effects and reduce liability for a product sample that is dropped off to a physician or other health care professional. The wording of the text in each disclaimer is carefully written and approved by legal, marketing, or sample compliance officers from the pharmaceutical company, or both. In Oracle CRM On Demand, the text for only one sample disclaimer is active at any time for a company.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking disclaimer information, the Sample Disclaimer tab might be excluded from your setup.

Working with the Sample Disclaimer Homepage

The Sample Disclaimer Homepage is the starting point for managing sample disclaimers. This page displays information that is relevant to you.

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

Before you begin. To work with sample disclaimers, your user role must include the Enable Basic Samples Operations privilege.

Creating a Sample Disclaimer

You can create a sample disclaimer by clicking the New button in the Recently Modified Sample Disclaimers section. All sample disclaimers have a status of Inactive when created. For more information, see [Creating Records](#) (on page 38) and Sample Disclaimer Fields.

Working with Sample Disclaimer Lists

The Sample Disclaimer List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for sample disclaimers.

Sample Disclaimer List	Filters
All Sample Disclaimers	All sample disclaimers to which you have visibility, regardless of who owns the sample disclaimer.
Recently Modified Sample Disclaimers	All sample disclaimers that have been modified recently, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Disclaimers

The Recently Modified Sample Disclaimers section shows the sample disclaimers that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Sample Disclaimer Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Sample Disclaimer Homepage:

- Recently Created Sample Disclaimers
- Recently Modified Sample Disclaimers
- Additional report sections (Your company administrator can make report sections available for display on your Sample Disclaimer Homepage.)

To add sections to your Sample Disclaimer Homepage

- 1 On the Sample Disclaimer Homepage, click Edit Layout.
- 2 On the Sample Disclaimer Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about sample disclaimers:

- [Sample Disclaimer](#) (on page 490)
- [Sample Disclaimer Fields](#) (on page 493)
- [Managing Sample Disclaimers](#) (on page 491)

Managing Sample Disclaimers

For step-by-step procedures for managing sample disclaimers, see the following:

- [Activating a Sample Disclaimer](#) (on page 492)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

- [Sample Disclaimer](#) (on page 490)
- [Sample Disclaimer Fields](#) (on page 493)
- [Working with the Sample Disclaimer Homepage](#) (on page 490)

Activating a Sample Disclaimer

All sample disclaimer records are automatically assigned a status of Inactive when they are created. When all the text in a sample disclaimer record is defined and approved by the appropriate departments within your company, then you can activate the sample disclaimer record.

The following restrictions apply to sample disclaimers:

- Only one sample disclaimer record can be active at any time.
- You cannot make changes to an expired or currently active sample disclaimer.
- Sales representatives, physicians, and other health care professionals can view the sample disclaimer that is currently active during the signature capture process.

Before you begin. To activate sample disclaimers, your user role must include the Enable Basic Samples Operations privilege.

To activate a sample disclaimer record

- 1 On the Sample Disclaimer List page, click Edit to open the sample disclaimer record that you want. You must select a sample disclaimer record that has a status of Inactive.
- 2 On the Sample Disclaimer Edit page, click Activate to activate the sample disclaimer record.

This step does the following:

- Sets the start date for the newly activated sample disclaimer and the end date for the previously active sample disclaimer (if there was one)
- Sets the status of the changes to the previously active sample disclaimer to Expired

NOTE: The Activate button is disabled if you open an Active or Expired sample disclaimer record.

Sample Disclaimer Fields

Use the Sample Disclaimer Edit page to create a sample disclaimer, or update details for an existing sample disclaimer. The Sample Disclaimer Edit page shows the complete set of fields for a sample disclaimer.

TIP: You can also edit sample disclaimers on the [Sample Disclaimer List](#) page and the [Sample Disclaimer Detail](#) page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the sample disclaimer fields.

Field	Description
Key Disclaimer Information	
Disclaimer Text	The disclaimer text that you want to insert.
Status	<p>The status of the disclaimer text, which can be one of the following values:</p> <ul style="list-style-type: none"> ■ Inactive. All sample disclaimer records have a status of Inactive when they are created. ■ Active. When a sample disclaimer record is activated, its status changes to Active. Only one sample disclaimer record can be active at any point in time. ■ Expired. When a new sample disclaimer record is created and activated, the status of the previously active sample disclaimer record changes to Expired.
Start Date	<p>The date when the disclaimer becomes active.</p> <p>This field remains blank when a sample disclaimer record is created. After the sample disclaimer record is activated, Oracle CRM On Demand populates this field with the current date.</p>
End Date	<p>The date when the disclaimer expires.</p> <p>This field remains blank when a sample disclaimer record is created. After the new sample disclaimer record is activated, Oracle CRM On Demand populates this field with the current date.</p>
Description	
Comments	General comments associated with the disclaimer. You can add comments only to inactive sample disclaimers.
Record Information	
Created	The user that created the Sample Disclaimer record.
Modified	The user that modified the Sample Disclaimer record.

Related Information

See the following topics for related information about sample disclaimers:

- [Sample Disclaimer](#) (on page 490)
- [Working with the Sample Disclaimer Homepage](#) (on page 490)
- [Managing Sample Disclaimers](#) (on page 491)

Personalized Content Delivery

This topic introduces the Personalized Content Delivery (PCD) features available with Oracle CRM On Demand Life Sciences Edition.

About Personalized Content Delivery

Personalized Content Delivery (PCD) is Oracle's closed-loop marketing solution for electronic detailing presentations. PCD enables sales and marketing organizations to manage digital content, create messaging plans, and distribute these messaging plans to the field sales force. Sales organizations can then deliver tailored presentations to customers while automatically capturing customer response metrics to be passed back to the marketing organization for closed loop analysis. PCD is required for delivering presentations and capturing customer-response metrics.

Scenario for Using PCD

Oracle CRM On Demand PCD enables users to:

- Manage digital content
- Manage Messaging Plans
- Store Customer Responses to Messaging Plans

The intended users of the Oracle CRM On Demand PCD solution are product managers, sales operations managers, and others who develop collateral for use by a sales force.

The following scenario provides an overview of how the PCD functionality is intended to be used:

1 Manage Digital Content

Digital content (graphics files) are first attached to a solution record. While PCD supports a wide range of graphic formats, the most common format is a SWF file, which enables rich media presentations. A corresponding thumbnail image (typically a PNG, GIF, or JPG file) would also be attached to the same solution record to provide for a compact graphical representation of the larger media file. The solution record includes fields for metadata about the attached file, such as expiration date, and whether it has received marketing and legal approval.

To set up solution records, see [Solutions](#) (on page 278).

2 Manage Messaging Plans

After attaching graphics files to Solution records, users create messaging plans, consisting of a collection of media files arranged to communicate a sales message. Users specify a sequence of

messaging plan items that make up a messaging plan. Each messaging plan item corresponds to a Solution record and its associated digital content, and also includes related media files that a presenter can use to go into more detail on a given topic. Whereas a Solution record consists of a digital media file that can be used for multiple messaging plans, a messaging plan item represents a unique instance of a given Solution media file, with metadata specific to the use of a media file for a particular messaging plan.

To set up a messaging plan and its associated records, see [Messaging Plans](#) (on page 495), [Messaging Plan Items](#) (on page 501), and [Messaging Plan Item Relations](#) (on page 506).

3 Store Customer Response to Messaging Plans

Messaging Plans are delivered in an application external to Oracle CRM On Demand. Oracle CRM On Demand receives audience feedback from the external application and stores this information. Such feedback is stored for discrete periods in the delivery of the messaging plan and can also be associated with predefined responses.

To set up message responses, see [Adjusting Message Responses](#) (on page 136).

Messaging Plans

Use the Messaging Plan pages to create, update, and track messaging plans.

A *messaging plan* is a presentation delivered using a personal computer or tablet computer. Sales users use a messaging plan to describe products and track customer feedback. The messaging plan pages capture various attributes of a messaging plan, such as the product it covers, the expiration date of the messaging plan, and other parameters.

Brand managers, product managers, and sales operation managers create messaging plans. Messaging plans consist of a specific sequence of content, so that sales users deliver presentations that comply with company legal and marketing guidelines.

A messaging plan might contain a number of messaging plan items in a specific sequence, analogous to a traditional presentation consisting of a number of slides. Or, a messaging plan might be one slide communicating a specific message. When creating an activity, sales representatives can review the recommended messaging plans for the activity, for example, a sales call, task, or appointment, to see if there are any recommendations. Messaging plan recommendations are based on the segment matches and objective associations between the messaging plan and the sales call, task, or appointment. For more information, see [Reviewing Recommended Messaging Plans for Activities](#) (on page 498).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include the administration of messaging plan information, the messaging plan tab might be excluded from your setup. Your user role must include the Manage Personalized Content Delivery privilege to work with the messaging plan pages.

Working with the Messaging Plan Homepage

The Messaging Plan Homepage is the starting point for managing messaging plan records. This page contains several sections and displays information that is relevant to you.

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

Creating a Messaging Plan

You can create a new messaging plan by clicking the New button in the Recently Modified Messaging Plans section. For more information, see [Creating Records](#) (on page 38) and [Messaging Plan Fields](#) (on page 499).

Working with Messaging Plan Lists

The Messaging Plan Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for messaging plans.

Messaging Plan List	Filters
All Messaging Plans	All messaging plans to which you have visibility, regardless of who owns the messaging plan.
Recently Modified Messaging Plans	All messaging plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plans

The Recently Modified Messaging Plans section shows the messaging plans that you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to Your Messaging Plan Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Messaging Plan Homepage:

- Recently Created Messaging plans
- Recently Modified Messaging plans

- My Recently Created Messaging plans
- My Recently Modified Messaging plans
- Additional report sections (Your company administrator can make report sections available for display on your messaging plan Homepage.)

To add sections to your Messaging Plan Homepage

- 1 On the Messaging plan Homepage, click Edit Layout.
- 2 On the Messaging plan Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Messaging Plans

For step-by-step procedures for managing messaging plans, see:

- [Adding Books to a Messaging Plan](#) (on page 498)
- [Adding Messaging Plan Items](#) (on page 498)
- [Reviewing Recommended Messaging Plans for Activities](#) (see "Reviewing Recommended Messaging Plans for Activities" on page 498)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plans:

- [Messaging Plans](#) (on page 495)
- [Working with the Messaging Plan Homepage](#) (on page 496)
- [Messaging Plan Fields](#) (on page 499)

NOTE: Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan pages.

Adding Books to a Messaging Plan

Use the following procedure to add books to a messaging plan. When you add a book to a messaging plan, you can then modify or remove the book. This procedure assumes that the book is exposed as a related item on the Messaging Plan Detail page. For more information about exposing related items, see [Customizing Related Item Layouts](#) (on page 1056).

To add a book to a messaging plan

- 1 On the Messaging Plan List page, open the messaging plan that you want.
- 2 On the Messaging Plan Detail page, click Add in the Books section of the page.
- 3 In the book selector, choose the book that you want to add to the messaging plan, and then click OK.
For more information about books, see [Book Management](#) (on page 1177).

Adding Messaging Plan Items

You can add a messaging plan item to a messaging plan. A messaging plan item contains information about the items that make up a messaging plan. For more information on messaging plan items, see [Messaging Plan Items](#) (on page 501).

NOTE: If you do not see the Messaging Plan Item Relations related item section in your Contact Detail page, add this related item section, as described in [Customizing Related Item Layouts](#) (on page 1056), or contact your company administrator.

To add a messaging plan item to a messaging plan

- 1 From the Messaging Plan Detail page, scroll to the Messaging Plan Item section and click New.
- 2 Complete the fields as described in [Messaging Plan Item Fields](#) (on page 504). Then save the record.

Reviewing Recommended Messaging Plans for Activities

During activity creation, sales representatives can record information about the account, contact, or product associated with the activity. Sales representatives can also review the recommended messaging plans for the activity (sales call, task, or appointment) if there are any recommendations. Messaging plan recommendations are based on segment matches and objective associations between the messaging plan and the sales call, task, or appointment as follows:

- If the primary or secondary segment of a messaging plan matches the segment specified for the activity, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with a full gold star.
- If the primary or secondary objective of a messaging plan matches the objective specified for the activity, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with a half gold star.
- If there are no segment or objective matches between the messaging plan and the activity, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with an empty white star.

For more information about sales calls, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126) and [Dropping Samples During a Sales Call](#) (on page 469). For more information about activities, see [Calendar and Activities](#) (on page 117).

Use the following procedure to review the recommended messaging plans for activities.

To review recommended messaging plans for activities

- 1 Select the activity for your visit.
For instruction on selecting activities, see [Finding Records](#). (see "Finding Records" on page 41)
- 2 On the Detail page (Call, Task, or Appointment Detail) for the activity, scroll down to the Calls section, and open the sales call that you want to review.
- 3 On the Call Detail page, scroll down to the Available Message Plans section, and review the list of messaging plans as follows:
 - A full gold star in the Recommendation field indicates a segment match between the messaging plan and the activity.
 - A half gold star in the Recommendation field indicates a match of objectives between the messaging plan and the activity.
 - An empty white star in the Recommendation field indicates that there is no match (segment or objectives) between the messaging plan and the activity.
- 4 Click the message plan name link to open and review the messaging plan.

Messaging Plan Fields

Use the Messaging Plan Edit page to add a messaging plan, or update details for an existing messaging plan. The Messaging Plan Edit page shows the complete set of fields for a messaging plan.

TIP: You can also edit messaging plans on the [Messaging Plan List](#) page and the [Messaging Plan Detail](#) page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the messaging plan fields.

Field	Description
Key Messaging Plan Information	
Name	The name of the messaging plan. (Required.)
Type	The messaging plan category. Some predefined types are: Product Launch and Targeted Message. Use the picklist to choose the type. (Required.)
Product	The product associated with this messaging plan. Use the Lookup icon to select a product. (Required.)
Code	A free-text field that can be used to classify a messaging plan by intent, therapeutic area, or other organizationally defined classification.
Status	The current status of the messaging plan. Possible status values are: Approved, In Progress, Rejected, Released, or Submitted. Use the picklist to select a status. (Required.)
Verify	Indicates that each constituent messaging plan item of the messaging plan has been verified to display properly and consequently has a verification status of Successful. If all the constituent messaging plan items have a verification status value of Successful, the Verify field is set to a value of Successful. Otherwise, the value is set to Failed. This field is set automatically by Oracle CRM On Demand.
Segment	The market segment (that is, the group of accounts) at which the messaging plan is targeted.
NOTE: The Primary Target Objective, Primary Segment, Secondary Target Objective, and Secondary Segment fields are not available by default. To add these fields to the Messaging Plan Detail page, contact your company administrator.	
Primary Target Objective	Indicates the first objective of this messaging plan. Enter your objective, or click the Lookup icon, and select an objective from the list.
Primary Segment	Indicates the primary segment to associate with this messaging plan. The options are: White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Pentamillionaires, and Ultra-High Net Worth.
Secondary Target Objective	Indicates the second objective of this messaging plan. Enter your objective, or click the Lookup icon, and select an objective from the list. NOTE: An error message is displayed when the primary objective and secondary objective are the same, and if a secondary objective is selected without a primary objective.
Secondary Segment	Indicates the secondary segment to associate with this messaging plan. The options are: White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Pentamillionaires, and Ultra-High Net Worth. NOTE: An error message is displayed when the primary segment and secondary segment are the same, and if a secondary segment is selected without a primary segment.

Field	Description
Owner	The user who owns the messaging plan record. By default, this field is set to the user who created the messaging plan. Use the Lookup icon to change the owner. (Required.)
Start Date	The date when the messaging plan becomes visible (MM/DD/YYYY). Use the Calendar icon to select the date.
Expiration Date	The date when the messaging plan is deactivated (MM/DD/YYYY). Use the Calendar icon to select the date.
Release Date	The date when this content can be used in Personal Content Delivery (PCD), (MM/DD/YYYY). Use the Calendar icon to select the date.
Disclosure Mandatory	This check box indicates that a disclosure message must be presented at the beginning of this messaging plan. (Required.)
Enable Followup	This check box is intended for future use.
Lock Sequence	This check box is not used in the current release of Oracle CRM On Demand. (Required.)
Additional Messaging Plan Information	
Audience	The description of the targeted audience for this messaging plan.
Comment	Any general comments on this messaging plan.
Description	The description of this messaging plan record.

Related Information

See the following topics for related messaging plan information:

- [Messaging Plans](#) (on page 495)
- [Working with the Messaging Plan Homepage](#) (on page 496)
- [Managing Messaging Plans](#) (on page 497)

Messaging Plan Items

Use the Messaging Plan Item pages to create, update, and track messaging plan items.

A *messaging plan item* contains information about the items that make up a messaging plan. These items that make up a messaging plan are in a specific sequence, analogous to a traditional presentation consisting of a number of slides.

A *solution* is the multimedia content and graphic files (such as SWF, GIF or JPEG files) used in presentations that underlie a messaging plan item. While a solution can be reused, a messaging plan item is unique to a single messaging plan. The Messaging Plan Item page contains additional attribute information beyond what is associated with a solution.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking messaging plan item information, the Messaging Plan Item tab might be excluded from your setup. Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan Item pages.

Working with the Messaging Plan Item Homepage

The Messaging Plan Item Homepage is the starting point for managing messaging plan item records. This page displays information that is relevant to you.

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

Creating a Messaging Plan Item

You can create a new messaging plan item by clicking the New button in the Recently Modified Messaging Plan Items section. For more information, see [Creating Records](#) (on page 38) and [Messaging Plan Item Fields](#) (on page 504).

Working with Messaging Plan Item Lists

The Messaging Plan Item Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for messaging plan items.

Messaging Plan Item List	Filters
All Messaging Plan Items	All messaging plan items to which you have visibility, regardless of who owns the messaging plan items.
Recently Modified Messaging Plan Items	All messaging plan items with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plan Items

The Recently Modified Messaging Plan Items section shows the messaging plan items you modified most recently.

Click Show Full List to expand the list.

Adding Sections to your Messaging Plan Item Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Messaging Plan Item Homepage:

- Recently Created Messaging Plan Items
- Recently Modified Messaging Plan Items
- My Recently Created Messaging Plan Items
- My Recently Modified Messaging Plan Items
- Additional report sections (your company administrator can make report sections available for display on your Messaging Plan Item Homepage)

To add sections to your Messaging Plan Item Homepage

- 1 On the Messaging Plan Item Homepage, click Edit Layout.
- 2 On the Messaging Plan Item Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Click Save.

Managing Messaging Plan Items

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Adding Messaging Plan Item Relations](#) (on page 504)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plan items:

- [Messaging Plan Items](#) (on page 501)
- [Working with the Messaging Plan Item Homepage](#) (on page 502)
- [Messaging Plan Item Fields](#) (on page 504)

NOTE: Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan Item pages.

Adding Messaging Plan Item Relations

You can add a messaging plan item relation to a messaging plan item. A *messaging plan item relation* is a presentation item that provides optional information to support the primary messaging plan item. For example, if the main item shows the side effects for a new drug, optional related information might show the side effects of an older class of drugs. If the theme from the main item is that a clinical trial had good results, optional details might show numbers from the clinical trial. For more information on messaging plan item relations, see [Messaging Plan Item Relations](#) (on page 506).

NOTE: If you do not see the Messaging Plan Item Relations related item section in your Contact Detail page, add this related item section, as described in [Customizing Related Item Layouts](#) (on page 1056), or contact your company administrator.

To add a messaging plan item relation to a messaging plan item

- 1 From the Messaging Plan Item Detail page, scroll to the Messaging Plan Item Relation section, and click New.
- 2 Complete the fields, as described in [Messaging Plan Item Relations Fields](#) (on page 508). Save the record.

Messaging Plan Item Fields

Use the Messaging Plan Item Edit page to add a messaging plan item, or update details for an existing messaging plan item. The Messaging Plan Item Edit page shows the complete set of fields for a messaging plan item.

TIP: You can also edit messaging plan items on the Messaging Plan Item List page and the Messaging Plan Item Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the Messaging Plan Item fields.

Field	Description
Key Messaging Plan Item Information	

Field	Description
Sequence Number	The order in which this messaging plan item occurs within the messaging plan. (Required.)
Name	The name of the messaging plan item.
Display Name	The name with which the messaging plan item is displayed in a messaging plan.
Solution Name	The name of the digital content that the messaging plan item relation is based on. Use the Lookup icon to select the solution. (Required.)
Solution Name: Verification Status	Indicates whether digital content can be properly displayed. The possible values are: Not Verified, Successful, or Failed. (View-only) The value of this field is inherited from the linked Solution record that contains the digital content file.
Solution Name: Release Date	The date after which the solution content can be used in PCD. (View-only.)
Solution Name: Expiration Date	The date after which the solution content should not be used in PCD. (View-only.)
Disclosure Message	This check box flags a particular asset as a disclosure message. Often times, a messaging plan must be prefaced with a disclosure message or messages to ensure full disclosure of all relevant information and that all legal and regulatory guidelines are satisfied. (Required.)
Type	The messaging plan item category. Use the picklist to select a type. (Required.)
Rating	A qualitative rating of the effectiveness of this item. Use the picklist to select a rating.
Parent Messaging Plan	The messaging plan for which this messaging plan item is a component. Use the Lookup icon to select the parent messaging plan. (Required.)
Status	The current status of the messaging plan item. Use the picklist to select the status. The preconfigured choices are Hide and Show.
Description	A brief description of the content for this item.
Message Plan Item Additional Information	
Synopsis	A brief description for the item.
Speaker Notes	Notes that you can add when presenting this item.

Field	Description
Audience	The targeted user for the content.

Related Topics

See the following topics for related information about messaging plan items:

- [Messaging Plan Items](#) (on page 501)
- [Working with the Messaging Plan Item Homepage](#) (on page 502)
- [Managing Messaging Plan Items](#) (on page 503)

Messaging Plan Item Relations

Use the Messaging Plan Item Relations pages to create, update, and track messaging plan item relations.

A *messaging plan item relation* is a presentation item that provides optional information to support the primary messaging plan item. For example, if the main item shows the side effects for a new drug, optional related information might show the side effects of an older class of drugs. If the theme from the main item is that a clinical trial had good results, optional details might show numbers from the clinical trial. A messaging plan is made up of a number of messaging plan items in a specific sequence, analogous to a traditional presentation consisting of a number of slides. Each messaging plan item might have related items associated with it, which are called *messaging plan item relations*. The Messaging Plan Item Relations page contains information about these supporting presentation items.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking messaging plan item relations, the Messaging Plan Item Relations tab might be excluded from your setup. Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan Item Relations pages.

Working with the Messaging Plan Item Relations Homepage

The Messaging Plan Item Relations Homepage is the starting point for managing messaging plan item relations records. This page contains several sections and displays information that is relevant to you.

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

Creating a Messaging Plan Item Relation

You can create a new messaging plan item relation by clicking the New button in the Recently Modified Messaging Plan Item Relations section. For more information, see [Creating Records](#) (on page 38) and [Messaging Plan Item Relations Fields](#) (on page 508).

Working with Messaging Plan Item Relations Lists

The Messaging Plan Item Relations Lists section shows a number of filtered lists. *Filtered lists* are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for Messaging Plan Item Relations.

Messaging Plan Item Relation List	Filters
All Messaging Plan Item Relations	All messaging plan item relations to which you have visibility, regardless of who owns the messaging plan item relation.
Recently Modified Messaging Plan Item Relations	All messaging plan item relations with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plan Item Relations

The Recently Modified Messaging Plan Item Relations section shows the messaging plan item relations you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to your Messaging Plan Item Relations Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Messaging Plan Item Relations Homepage:

- Recently Created Messaging Plan Item Relations
- Recently Modified Messaging Plan Item Relations
- My Recently Created Messaging Plan Item Relations
- My Recently Modified Messaging Plan Item Relations
- Additional report sections (Your company administrator can make report sections available for display on your Messaging Plan Item Relations Homepage.)

To add sections to your Messaging Plan Item Relations Homepage

- 1 On the Messaging Plan Item Relations Homepage, click Edit Layout.

- 2 On the Messaging Plan Item Relations Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Messaging Plan Item Relations

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plan item relations:

- [Messaging Plan Item Relations](#) (on page 506)
- [Working with the Messaging Plan Item Relations Homepage](#) (on page 506)
- [Messaging Plan Item Relations Fields](#) (on page 508)

NOTE: Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan Item Relation pages.

Messaging Plan Item Relations Fields

Use the Messaging Plan Item Relations Edit page to add a messaging plan item relation, or update details for an existing messaging plan item relation. The Messaging Plan Item Relations Edit page shows the complete set of fields for a messaging plan item relation.

TIP: You can also edit messaging plan item relations on the Messaging Plan Item Relations List page and the Messaging Plan Item Relations Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Messaging Plan Item Relations fields.

Field	Description
Key Messaging Plan Item Relations Information	
Name	The name of the messaging plan item relation.
Display Name	The name used to display the messaging plan item relation in the messaging plan.
Parent MP Item	The parent messaging plan item for which this messaging plan item relation provides the optional backup or detailed information. (Required.)
Description	A brief description of the contents for this item.
Type	The messaging plan item relation category. Use the picklist to select a type. (Required.)
Solution Name	The name of the multimedia or graphic file content on which the messaging plan item relation is based. (Required.)
Synopsis	A brief description for the item.

Related Information

See the following topics for related information about messaging plan item relations:

- [Messaging Plan Item Relations](#) (on page 506)
- [Working with the Messaging Plan Item Relations Homepage](#) (on page 506)
- [Managing Messaging Plan Item Relations](#) (on page 508)

9

Wealth Management

Oracle CRM On Demand provides the following record types for wealth management:

- **Financial Accounts.** Use these pages to manage financial account information.
- **Financial Account Holders.** Use these pages to manage information about holders of financial accounts.
- **Financial Account Holdings.** Use these pages to manage the transactions of a single financial product for a financial account.
- **Financial Plans.** Use these pages to manage the financial plans of a contact or business for one or more specific financial accounts.
- **Financial Products.** Use these pages to manage financial product information.
- **Financial Transactions.** Use these pages to track the transactions for a specific financial account.
- **Portfolios.** Use these pages to manage portfolio accounts.
- **Households.** Use these pages to manage information for a group of related contacts, who live in the same household.

Note: All of these record types are available only with Oracle CRM On Demand Financial Services Edition.

Households

Use the Household pages to create, update, and track household records.

A *household* is a group of contacts generally sharing a common link or association such as a family (parents and children) who live at the same address within the same house. A household allows contacts to be grouped together and can track the contact groupings, allowing a contact to be grouped in to one or more households or contact groups. Financial institutions and individual users, such as bankers, advisors and relationship managers, have many different uses for grouping contacts. The related information for households can be accumulated from the contacts who are linked to the household.

A household provides valuable segmentation information on the household as a whole, as well as a summary of information about the household member contacts. You can use the Households pages to identify and capture demographic information about a household. You can also use the Household pages to review customer's financial accounts, products, and contact information that is associated with that household. This information allows you to assess customers' data.

Grouping all of a client's accounts by household allows a financial institution to identify a client's value to the organization and seek opportunities to cross-sell and upsell additional products and services to the client, such as homeowner's insurance and loans for children's education. In addition, the ability to view all of a customer's financial accounts by household allows a financial institution to view the household's overall financial position.

Subaccounts and Related Information for Households

You can use the Household pages to identify and profile a household. You can also use the Household pages to review a household's subaccounts and other related information including:

- **Contacts.** Contacts can be related to a household. On the Household page, you can view all contacts related to a household. For information on contacts, see [Contacts](#) (on page 194).
- **Claims.** Claims can be related to a household. On the Household page, you can view all claims related to a household. For information on claims, see [Claims](#) (on page 553).
- **Financial Plans.** Financial plans can be related to a household. On the Household page, you can view all financial plans related to a household. For information on financial plans, see [Financial Plans](#) (on page 536).
- **Policy Holders.** Policy holders can be related to a household. On the Household page, you can view all policy holders related to a household. For information on policy holders, see [Policy Holders](#) (on page 577).
- **Financial Account Holders.** Financial account holders can be related to a household. On the Household page, you can view all financial account holders who are related to a household. For information on financial account holders, see [Financial Account Holders](#) (on page 529).
- **Household Team.** Users can be part of the team related to a household. On the Household page, you can view all team members (users) related to a household.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking household information, the Households tab might be excluded from your setup.

Working with the Household Homepage

The Household Homepage is the starting point for managing households.

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

Creating a Household

You can create a household by clicking the New button in the My Recently Viewed Households section. For more information, see [Creating Records](#) (on page 38) and [Household Fields](#) (on page 516).

Working with Household Lists

The Household Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for Households.

Household List	Filters
Recently Modified Households	All households with your name in the Owner field, sorted by the modified date

Household List	Filters
All Households	All households to which you have visibility regardless of who owns the household

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Households

The My Recently Viewed Households section shows the households that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Household Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Household Homepage:

- Recently Created Households
- Recently Modified Households
- My Recently Created Households
- My Recently Modified Households
- One or more report sections (Your company administrator can make report sections available for display on your Household Homepage.)

To add sections to your Household Homepage

- 1 On the Household Homepage, click Edit Layout.
- 2 On the Household Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Information

See the following topics for related Household information:

- [Households](#) (on page 511)
- [Managing Households](#) (on page 514)
- [Household Fields](#) (on page 516)

Managing Households

To manage households, do the following tasks:

- [Profiling Households](#) (on page 514)
- [Tracking Household Members](#) (on page 515)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Transferring Ownership of Records](#) (on page 83)
- [Adding Notes](#) (on page 87)
- [Attaching Files and URLs to Records](#) (on page 94)
- [Deleting and Restoring Records](#) (on page 100)
- [Merging Records](#) (on page 86)
- [Sharing Records \(Teams\)](#) (on page 84)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Household information:

- [Households](#) (on page 511)
- [Working with the Household Homepage](#) (on page 512)
- [Household Fields](#) (on page 516)

Profiling Households

You can profile households by updating the information in household records.

To profile a household

- 1 Select the household.
For instructions on selecting households, see [Finding Records](#) (on page 41).
- 2 On the Household Detail page, click Edit.
- 3 On the Household Edit page, fill in the information. For a description of the fields, see [Household Fields](#) (on page 516).

Tracking Household Members

To track members for households, add them as contacts within the household.

To track household members

- 1 Select the household record.
For instructions on selecting household records, see [Finding Records](#) (on page 41).
- 2 On the Household Details page, scroll down to the Contacts section and click Add.
NOTE: You might want to add the Contacts section to your layout. For information on changing the layout, see [Changing Your Detail Page Layout](#) (on page 619).
- 3 On the Contact List page, click the Lookup icon in the New Contact field. This launches the Search for Contact window.
- 4 In the Search for Contact window, select a contact.
- 5 On the Contact List page, select the relation to the household for the contact in the Relationship drop-down.

Field	Description
New Contact	The contact name for the household. Select the contact in the Search for Contact window.
Relationship	The contact's relationship to the household. You can select many predefined relationships, for example: Head, Spouse, Child, In-Law, 2nd Generation Child, Boss, and so on.
Rollup	<p>Check the Rollup check box to select a subset of contacts to rollup into the household financial totals (for example, Total Net Worth or Total Income). Contacts not selected are not rolled up into any of the totals for households, or for any related list such as Opportunities, Portfolios, Activities, or Notes. Rollup is checked by default.</p> <p>Note: The Rollup check box on the Contact Detail page and the Household Detail page are the same, so a change on one page is</p>

Field	Description
	reflected in the other page.

- 6 Click Save on the Contact List page.
- 7 Drill down in the New Contact field to select a contact, and then select the relation to the household for the contact in the Relationship picklist.

For information on Household fields, see [Household Fields](#) (on page 516).

Household Fields

Use the Household Edit page to add a household or update details for an existing household. The Household Edit page shows the complete set of fields for a household.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields. Many fields on the Household pages are read-only because they are calculated from the contact records linked to the household with the Roll Up field checked. Additive fields, such as Total Assets, are totaled from all contacts with the Roll Up field checked in the household. Non-additive fields, such as addresses, are usually rolled up from the primary contact in the household.

If there are no contact records linked to the household, you can add contacts to the household record, see [Tracking Household Members](#) (on page 515).

Field	Description
Key Household Information	
Household Name	Limit of 50 characters.
Primary	Read-only.
Household Detail Information	
Type	Default values are: Family - Children, Family - No Children, Family - Senior Citizen, Single, Single Parent Family, Family, Extended Family, Unmarried Couple, Empty Nest, Retired, and Other.
Segment	Default values are: White Collar, Blue Collar, Rural, Own Residence, Renter, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth.
Last Activity	Read-only. Reflects the date of the last activity linked to the household.

Field	Description
Head of Household DOB	Read-only.
Additional Information	
Account	Read-only.
Contact	Read-only.
Owner	<p>Generally, the owner can update record details, transfer a record to another owner, or delete the record. However, access levels can be adjusted by the Administrator to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>
Household Financial Profile	
Total Income	The total income for all contacts that roll up into the household. Read-only.
Total Assets	The total assets for all contacts that roll up into the household. Read-only.
Total Expenses	The total expenses for all contacts that roll up into the household. Read-only.
Total Liabilities	The total liabilities for all contacts that roll up into the household. Read-only.
Total Net Worth	The total net worth for all contacts that roll up into the household. Read-only.
Investment Risk Profile	
Risk Profile	Populated from contact record of the head of household. Read-only.
Experience Level	Populated from contact record of the head of household. Read-only.
Investment Horizon	Populated from contact record of the head of household. Read-only.
Current Investment Mix	Populated from contact record of the head of household. Read-only.
Objective	Populated from contact record of the head of household. Read-only.
Primary Goal	Populated from contact record of the head of household. Read-only.

Related Information

See the following topics for related Household information:

- [Households](#) (on page 511)
- [Working with the Household Homepage](#) (on page 512)
- [Managing Households](#) (on page 514)
- [Sharing Records \(Teams\)](#) (on page 84)

Portfolios

Use the Portfolios pages to create, update, and track any type of portfolio. Portfolios can be any type of information related to a contact that you want to track.

Portfolios can represent the following:

- **Financial accounts.** A brokerage account, loan, or a credit card
- **Insurance contracts.** A life insurance policy or an annuity

You can use the Portfolio pages to identify and profile a portfolio.

TIP: You can use the financial account record type and financial account hierarchy to track financial account groups, which are also known as portfolios. For more information about financial accounts, see [Tracking Parent Financial Accounts](#) (on page 528).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Portfolios tab might be excluded from your setup.

Working with the Portfolio Account Homepage

The Portfolio Account Homepage is the starting point for managing portfolio accounts.

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

Creating a Portfolio Account

You can create a portfolio account by clicking the New button in the My Recently Viewed Portfolios section. For more information, see [Creating Records](#) (on page 38) and [Portfolio Account Fields](#) (on page 522).

Working with Portfolio Account Lists

The Portfolio Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for portfolio accounts.

Portfolio List	Filters
----------------	---------

Portfolio List	Filters
All Portfolio Accounts	All portfolio accounts to which you have visibility
Recently Created Portfolios	All portfolio accounts to which you have visibility, sorted by the created date
Recently Modified Portfolios	All portfolio accounts to which you have visibility, sorted by the modified date
My Recently Modified Portfolios	All portfolio accounts that you recently modified.
My Recently Created Portfolios	All portfolio accounts that you recently created.
My Portfolio Accounts	All portfolio accounts with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Portfolio Accounts

The My Recently Viewed Portfolios section shows the portfolio accounts that you viewed most recently.

Adding Sections to Your Portfolio Account Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Portfolio Account Homepage:

- Recently Created Portfolios
- Recently Modified Portfolios
- My Recently Created Portfolios
- My Recently Modified Portfolios
- One or more report sections (Your company administrator can make report sections available for display on your Portfolio Account Homepage.)

To add sections to your Portfolio Account Homepage

- 1 On the Portfolio Account Homepage, click Edit Layout.
- 2 On the Portfolio Account Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.

- 3 Click Save.

Related Information

See the following topics for related portfolio account information:

- [Portfolio Account Fields](#) (on page 522)
- [Managing Portfolio Accounts](#) (on page 520)

Managing Portfolio Accounts

To manage portfolio accounts, do the following tasks:

- [Tracking Key Contacts for Portfolio Accounts](#) (on page 521)
- [Specifying Portfolio Subaccounts](#) (on page 521)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Linking Records to Your Selected Record](#) (on page 61) (including referrals)
- [Sharing Records \(Teams\)](#) (on page 84)
- [Transferring Ownership of Records](#) (on page 83)
- [Adding Notes](#) (on page 87)
- [Attaching Files and URLs to Records](#) (on page 94)
- [Deleting and Restoring Records](#) (on page 100)
- [Renaming Record Types](#) (on page 1097)
- [Merging Records](#) (on page 86)
- [Managing Calendars and Activities](#) (on page 119)
- [Process of Setting Up Books](#) (on page 1185)
- [Creating Web Applets](#) (on page 1061)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Portfolio Account information:

- [Working with the Portfolio Account Homepage](#) (on page 518)
- [Portfolio Account Fields](#) (on page 522)

Tracking Key Contacts for Portfolio Accounts

To track key contacts for portfolio accounts, add them as contacts linked to the portfolio account record.

To track key contacts for portfolio accounts

- 1 Select the portfolio account record.
For instructions on selecting portfolio accounts, see [Finding Records](#) (on page 41).
- 2 On the Portfolio Account Details page, scroll down to the Contacts section and click Add.
NOTE: You might want to add the Contacts section to your layout. For more information, see [Changing Your Detail Page Layout](#) (on page 619).
- 3 On the Contact List page, click the Lookup icon next to the Name column.
- 4 In the Lookup window, you can click New to create a new contact record or select an existing contact.
- 5 On the Contact List page, fill in the information as required.
- 6 Save the record.

Specifying Portfolio Subaccounts

You can indicate portfolio account hierarchies, such as a mutual fund that is within a life insurance policy or a brokerage account, by specifying a parent-child relationship. First create the parent portfolio account, and then select that account as the parent for the child or portfolio subaccount.

Portfolios have one-to-many relationship with portfolio subaccounts. For example, you can have many mutual fund or stock subaccounts for the brokerage portfolio account.

To create a portfolio subaccount

- 1 Select the parent portfolio account.
For information on selecting portfolio accounts, see [Finding Records](#) (on page 41).

- 2 On the Portfolio Account Details page, scroll to the Portfolio Sub-Accounts section and click New.
NOTE: You might have to add the Portfolio Sub-Accounts section to your layout. For information on changing the layout, see [Changing Your Detail Page Layout](#) (on page 619).
- 3 Complete the fields in the Portfolio Account Edit page that is launched.
- 4 Save the record.

To specify the parent portfolio account

- 1 Select the child portfolio subaccount.
For instructions on selecting portfolio accounts, see [Finding Records](#) (on page 41).
- 2 On the Portfolio Account Edit page, click the Lookup icon next to the Parent Portfolio Account field.
- 3 In the Lookup window, select the parent portfolio account.
- 4 Save the record.

Portfolio Account Fields

Use the Portfolio Account Edit page to add a portfolio account or update details for an existing portfolio account. The Portfolio Account Edit page shows the complete set of fields for a portfolio account.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Account Information	
Account Number	Required field. Limit of 100 characters.
Institution	Lookup field for the institution linked with this portfolio account.
Product	Lookup field for the product linked with this portfolio account.
Account Type	A picklist of available account types. Default values are: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings, and Other.
Primary Contact	Read-only.
Account	Lookup field for the account linked with this portfolio account.

Field	Description
Revenue	Revenue linked with this portfolio account.
Purchase Date	The date that the financial account is opened.
Cancelled/Sold Date	The date that the account is closed. If this is an individual holding, it may be the date that all shares are sold.
Status	Status of the portfolio account. Default values are: Active, Pending, Quote, Terminated, and Closed.
Parent Portfolio Account	The parent portfolio account for the current portfolio account.
Owner	<p>Generally, the owner can update record details, transfer a record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>
Primary Group	<p>Primary group of the portfolio owner.</p> <p>For releases previous to release 13, this field is used to define Group visibility to Portfolio records. It is recommended that you use the book functionality to replace this capability. For more information, see Process of Setting Up Books (on page 1185).</p>
Policy Information	
Risk Class	Defines the risk level of the portfolio. Limit of 50 characters.
Premium	The cost of the insurance policy in your currency units.
Face Value	The face value of the insurance policy in your currency units.
Effective Date	The start date for the insurance policy.
Expiration Date	The expiry date for the insurance policy.
Investment Information	
Total Asset Value	The value of all your investments in your currency units.
Valuation Date	The date of the valuation of your total assets.
Loan Information	
Loan Amount	The value of your loan in your currency units.
Annual % Rate	The interest rate for your loan.
Maturity	The date on which the loan is due for payment.
Term	Read-only. The concatenation of Term Length and Term Unit.
Term Length	The period of time over which the loan is amortized, usually expressed in months.

Field	Description
Term Unit	The picklist of possible term units. The default values are: Day, Week, Month, and Year.
Credit Card Information	
Credit Limit	The maximum credit available for the account.
Annual % Rate	The annual interest rate charged on charges placed on the balance.

Related Information

See the following topics for related Portfolio Account information:

- [Working with the Portfolio Account Homepage](#) (on page 518)
- [Managing Portfolio Accounts](#) (on page 520)

Financial Accounts

Use the Financial Account pages to create, update, and track any type of financial account. Financial accounts are typically the financial accounts of a contact or business that the financial institution manages. However, financial accounts can also track all financial accounts of a contact or business, including those accounts at other financial institutions.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Financial Accounts tab might be excluded from your setup.

A *financial account* is a record of the financial transactions between financial institutions. It contains financial products for which the financial institution has a specific fiduciary responsibility. Financial accounts provide a structure for financial institutions to manage both contact and business relationships.

NOTE: Within Oracle CRM On Demand Financial Services Edition, *Account* is renamed *Business Account*. Business accounts represent a legal entity such as a business, company, or trust. They provide parent and child relationships to support divisions, departments, and other complex legal structures.

You use financial accounts to track any financial accounts types, such as savings, checking, mortgage, certificates of deposit, credit cards, demand deposit accounts, investments, loans, retirement, education, and so on.

Using financial accounts, financial institutions can move from financial account-centric to client and household-centric relationships. Using this feature, you can access high-level financial account information that is contained in the Financial Account Type, Balance, and Joint fields to support client and household-centric relationships, including activities, opportunities, service requests, and calendars. Financial accounts also support accounts hierarchies and subaccounts. These hierarchies allow the grouping of accounts into portfolios. You use the grouping of accounts to group financial accounts into portfolios. The following figures show some examples of hierarchies. Figure 1 shows a parent and child relationship for a financial account. Figure 2 shows a portfolio account and financial account relationship. Figure 3 shows a financial account and subaccount relationship.

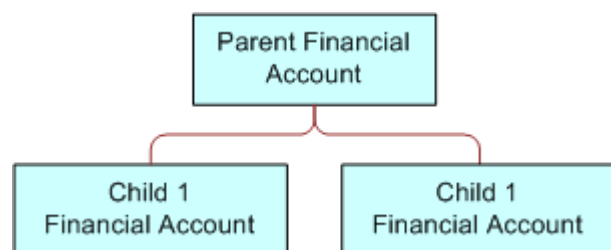


Figure 1: Parent and Child Relationship for Financial Account

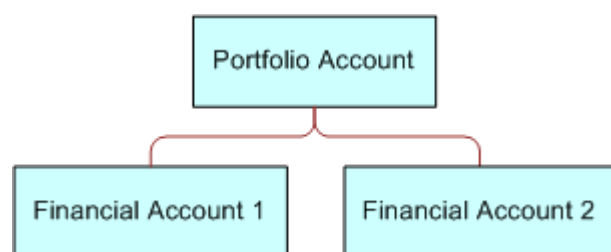


Figure 2: Portfolio Account and Financial Account Relationship

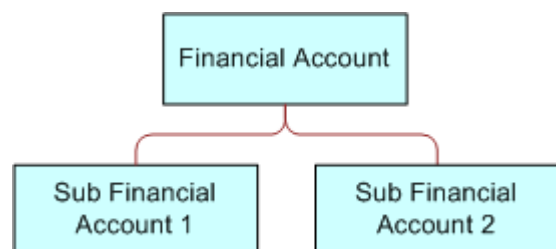


Figure 3: Financial Account and Subaccount Relationship

You can use the Financial Account pages to identify and profile a financial account. You can also use the Financial Account pages to review a financial account's subaccounts and other related information including:

- [Financial Account Holders](#) (on page 529)
- [Financial Account Holdings](#) (on page 533)
- [Financial Transactions](#) (on page 545)

- [Financial Plans](#) (on page 536)
- [Policies](#) (on page 572)
- [Opportunities \(on page 210\)](#). On the Financial Account pages, you can view all opportunities related to a financial account.
- Activities. On the Financial Account pages, you can view all activities related to a financial account.
- [Service Requests \(on page 270\)](#). On the Financial Account pages, you can view all service requests related to a financial account.
- [Leads \(on page 156\)](#). On the Financial Account pages, you can view all leads related to a financial account.

Working with the Financial Account Homepage

The Financial Account Homepage is the starting point for managing financial accounts.

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

Creating a Financial Account

You can create a financial account by clicking the New button in the Recently Modified Financial Accounts section. For more information, see [Creating Records](#) (on page 38) and [Financial Account Fields](#) (on page 528).

Working with Financial Account Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for financial accounts.

Financial Account List	Filters
All Financial Accounts	All financial accounts to which you have visibility
Recently Modified Financial Accounts	All financial accounts that you recently modified.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Accounts

The Recently Modified Financial Accounts section shows the financial accounts that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Financial Account Homepage, depending on what your company administrator has made available for display on your Financial Account Homepage.

The following procedure describes how to add sections to your Financial Account Homepage.

To add sections to your Financial Account Homepage

- 1 On the Financial Account Homepage, click Edit Layout.
- 2 On the Financial Account Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Financial Accounts

To manage financial accounts, do the following tasks:

- [Tracking Parent Financial Accounts](#) (on page 528)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related financial account information:

- [Working with the Financial Account Homepage](#) (on page 526)

■ [Financial Account Fields](#) (on page 528)

Tracking Parent Financial Accounts

To allow tracking of a financial account's parent financial account, add the parent financial account to the Parent Financial Account Field on the child financial account.

To track a parent financial account

- 1 Select the financial account.
For information on selecting financial accounts, see [Finding Records](#) (on page 41).
- 2 On the Financial Account Detail page, click Edit.
- 3 On the Financial Account Edit page, select the Parent Financial Account field, and select a financial account.

Financial Account Fields

Use the Financial Account Edit page to add a financial account, or update details for an existing financial account. The Financial Account Edit page shows the complete set of fields for a financial account.

TIP: You can indicate financial account hierarchies, such as a retirement financial account, which is a subsidiary of a portfolio financial account, by selecting Financial Account. For more information about indicating hierarchies, see [Tracking Parent Financial Accounts](#) (on page 528).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Account Profile	
Financial Account Number	The number of the financial account. This field has a limit of 50 characters.
Financial Account Type	The financial account type such as Savings, Credit, Mortgage, Investment, Wealth, Education, Insurance.
Primary Account	The check box is used to indicate that this financial account is the primary financial account.
Home Branch	The home branch for the financial account within the financial institution.
Financial Account	The name of the financial account. This field has a limit of 50 characters.

Field	Description
Open Date	The date on which the financial account was opened at the financial institution.
Joint	The check box used to specify that the financial account has joint ownership. More than one contact shares the ownership of the financial account.
Held Away	The check box is used to indicate that this financial account is being held away. <i>Held away</i> means that this financial account is not held by this financial institution, but is held at another financial institution.
Balance	The currency field representing the financial account's balance.
Balance as of	The date and time when the balance was last updated.
Financial Account Details	
Integration ID	The integration ID of the external information about the financial account. This field has a limit of 50 characters.
Held Away Institution	The name of the financial institution at which this financial account is being held away at.
Parent Financial Account	The parent financial account for this child financial account.
Financial Account Integration	
Description	The detailed description of the financial account.
External ID	The external source ID of the external information about the financial account. This field has a limit 50 characters.
External Last Updated	The date and time when the data for this financial account was last updated (from the external source).
External Source	The source of the external information about the financial account holding, for example, an application name, database name, integration name, and so on.

Related Topics

See the following topics for related Financial Account information:

- [Working with the Financial Account Homepage](#) (on page 526)
- [Managing Financial Accounts](#) (on page 527)

Financial Account Holders

Use the Financial Account Holder pages to create, update, and track the relationship between a financial account and its holders. A *financial account holder* is any contact who has a relationship with the financial account (typically, the legal owner of the financial account.)

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account holder information, the Financial Account Holder tab might be excluded from your setup.

A financial account holder record tracks the relationships between contacts and financial accounts, enabling a complete understanding of which contacts are related to which financial accounts, and which financial accounts are related to which contacts.

Using financial account holders, financial institutions and users can track the relationship between contacts and financial accounts, and can track specific attributes and details of the relationship. Financial account holders track the role of a contact in relation to a financial account, such as the legal owner, guardian, advisor, benefactor, and so on.

Working with the Financial Account Holder Homepage

The Financial Account Holder Homepage is the starting point for managing financial account holders.

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

Creating a Financial Account Holder

You can create a financial account holder by clicking the New button in the Recently Modified Financial Account Holders section. For more information, see [Creating Records](#) (on page 38) and [Financial Account Holder Fields](#) (on page 532).

Working with Financial Account Holder Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for financial account holders.

Financial Account Holder List	Filters
All Financial Account Holders	All financial account holders to which you have visibility, regardless of who owns the financial account holder
Recently Modified Financial Account Holders	All financial account holders, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Account Holders

The Recently Modified Financial Account Holders section shows the financial account holders that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Holders Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Financial Account Holder Homepage, depending on what your company administrator has made available for display on your Financial Account Holder Homepage.

The following procedure describes how to add sections to your Financial Account Holder Homepage.

To add sections to your Financial Account Holder Homepage

- 1 On the Financial Account Holder Homepage, click Edit Layout.
- 2 On the Financial Account Holder Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Information

See the following topics for related financial account holder information:

- [Managing Financial Account Holders](#) (on page 531)
- [Financial Account Holder Fields](#) (on page 532)

Managing Financial Account Holders

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- [Working with the Financial Account Holder Homepage](#) (on page 530)
- [Financial Account Holder Fields](#) (on page 532)

Financial Account Holder Fields

Use the Financial Account Holder Edit page to add a financial account holder, or to update details of an existing financial account holder. The Financial Account Holder Edit page shows the complete set of fields for a financial account holder.

TIP: You can also edit financial account holder information on the Financial Account Holder List page and the Financial Account Holder Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Account Holder Profile	
Financial Account Holder Name	The name of the financial account holder (usually a contact). This field has a limit of 100 characters.
Financial Account	The financial account with which the financial account holder is associated.
Role	The role of the financial account holder. A financial account holder can have more than one role. Some example roles are: Legal Guardian, Owner, Lawyer, and Influencer.
Primary Contact	Indicates whether the financial account holder is the primary contact for the financial account.
Joined	The date on which the financial account holder was first associated with the financial account. This might be different from the Open Date on the financial account. For example, a legal guardian might be assigned to (or given responsibility for) a financial account, after the date when the financial account was opened.
External ID	The external source ID of the external information about the financial account holder. This field has a limit of 50 characters.
External Source	The source of the external information about the financial account holder, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this financial account holder was last updated (from the external source).

Related Topics

See the following topic for related information:

- [Working with the Financial Account Holder Homepage](#) (on page 530)

Financial Account Holdings

Use the Financial Account Holding pages to create, update, and track financial products held by a specific financial account. Financial account holdings are typically the total of all financial account transactions of a single financial product for a financial account.

Financial account holdings enable you to know which financial products are held by each financial account. Financial account holdings can be used to track all types of financial products, such as the following:

- Physical assets (for example, house, art, and car)
- Financial instruments (for example, bond, stock, and mutual fund)
- Financial services and loans (for example, mortgage, line of credit)
- Any other instrument defined by you within financial products

Using financial account holdings, financial institutions can deliver summary information about customer financial accounts from their middle-office or back-office applications. This information provides views that are based on clients or households. Detailed information about the financial account holdings is available to you within Oracle CRM On Demand when you are managing the relationship with the client, such as the quantity, prices, performance, and important dates (such as the purchase date).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Financial Account Holding tab might be excluded from your setup.

Working with the Financial Account Holding Homepage

The Financial Account Holding Homepage is the starting point for managing financial account holdings.

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

Creating a Financial Account Holding

You can create a financial account holding by clicking the New button in the Recently Modified Financial Account Holdings section. For more information, see [Creating Records](#) (on page 38) and [Financial Account Holding Fields](#) (on page 535).

Working with Financial Account Holding Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for financial account holdings.

Financial Account Holding List	Filters
All Financial Account Holdings	All financial account holdings to which you have visibility, regardless of who owns the financial account holding
Recently Modified Financial Account Holdings	All financial account holdings, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Account Holdings

The Recently Modified Financial Account Holdings section shows the financial account holdings that were most recently modified.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Holding Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Financial Account Holding Homepage, depending on what your company administrator has set up.

The following procedure describes how to add sections to your Financial Account Holding Homepage.

To add sections to your Financial Account Holding Homepage

- 1 On the Financial Account Holding Homepage, click Edit Layout.
- 2 On the Financial Account Holding Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Financial Account Holdings

For step-by-step procedures that are common to many record types, see:

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- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related information:

- [Financial Account Holding Fields](#) (on page 535)

Financial Account Holding Fields

Use the Financial Account Holding Edit page to add a financial account holding, or update details for an existing, financial account holding. The Financial Account Holding Edit page shows the complete set of fields for a financial account holding.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some fields.

Field	Description
Financial Account Holdings Profile	
Financial Account	The financial account associated with the financial account holding.
Financial Product	The financial product associated with the financial account holding.
Financial Account Holdings Name	The unique name of the financial account holding.
Quantity	The number of financial product units of the holdings of this financial product for this financial account. This information usually comes from an external source.
Purchase Price	The purchase price of the holdings of this financial product for this financial account. This information usually comes from an external source.
Purchase Date	The date when the holdings of this financial product for this financial account were purchased. This information usually comes from an external source.
Value	The value of the holdings (that is, the purchase price multiplied by the

Field	Description
	quantity). This information usually comes from an external source.
Performance	The percentage gain or loss of the holdings of this financial product for this financial account. This information usually comes from an external source.
Financial Account Holdings Integration	
Integration ID	The integration ID of the external information about the financial account holdings. This field has a limit of 50 characters.
External ID	The external source ID of the external information about the financial account holdings. This field has a limit of 50 characters.
External Source	The source of the external information about the financial account holding, for example, an application name, database name, integration name, and so on.
External Last Updated	The date and time when the data for this financial account holding was last updated (from an external source).

Financial Plans

Use the Financial Plan pages to create, update, and track financial plans for a financial account. *Financial plans* are typically the financial plan of a contact or business for one or more specific financial accounts that a financial institution manages.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial-account plan information, the Financial Plan tab might be excluded from your setup.

A financial plan enables high-level financial planning by providing access to information like the status, stage of plan, and approvals. It also provides links to the middle-office and back-office applications. Batch feeds and updates from Web services are commonly used to integrate middle-office and back-office information in Oracle CRM On Demand.

Using financial plans, financial institutions can integrate customer relationship management with financial planning tasks, workflows, and deliverables throughout the entire financial-planning lifecycle. Using this feature, you can track activities, opportunities, service requests and leads for a financial plan to enable client and household-centric financial planning.

You can use the Financial Plan pages to identify and profile a financial plan. You can also use the Financial Plan pages to review a financial plan's subaccounts and other related information including:

- **Opportunity.** For more information, see [About Opportunities and Forecasts](#) (on page 210).
- **Activity.** For more information, see [Activity Fields](#) (on page 143).
- **Service Request.** For more information, see [Managing Service and Communications](#) (on page 269).
- **Lead.** For more information, see [Leads](#) (on page 156).

Working with the Financial Plan Homepage

The Financial Plan Homepage is the starting point for managing financial plans.

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

Creating a Financial Plan

You can create a financial plan by clicking the New button in the Recently Modified Financial Plans section. For more information, see [Creating Records](#) (on page 38) and [Financial Plan Fields](#) (on page 538).

Working with Financial Plan Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for financial plans.

Financial Plan List	Filters
All Financial Plans	All financial plans to which you have visibility regardless of who owns the financial plan.
Recently Modified Financial Plans	All financial plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Plans

The Recently Modified Financial Plans section shows the financial plans that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Plan Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Financial Plan Homepage, depending on which sections your company administrator has made available for display on your Financial Plan Homepage.

The following procedure describes how to add sections to your Financial Plan Homepage.

To add sections to your Financial Plan Homepage

- 1 On the Financial Plan Homepage, click Edit Layout.
- 2 On the Financial Plan Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Financial Plans

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- [Working with the Financial Plan Homepage](#) (on page 537)
- [Financial Plan Fields](#) (on page 538)

Financial Plan Fields

Use the Financial Plan Edit page to add a financial plan or update details for an existing financial plan. The Financial Plan Edit page shows the complete set of fields for a financial plan.

TIP: You can also edit financial plans on the Financial Plan List page and the Financial Plan Detail page. For more information on updating records, see [Updating Record Details](#)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Financial Plan fields.

Field	Description
-------	-------------

Field	Description
Financial Plan Profile	
Financial Plan Name	The name of the financial plan.
Type	The financial plan type. Examples are: retirement, portfolio, wealth, education, and so on.
Financial Account	The financial account with which the plan is associated.
Status	The financial plan status. Examples are: In Process, Active, Approved, Under Review by Management, Under Review by Customer, and so on.
Sent to Contact	Select the check box to indicate whether this financial plan has been sent to the contact.
Approved by Contact	Select the check box to indicate whether this financial plan has been approved by the contact.
Financial Plan Summary	
External Source	The source of the external information about the financial plan, for example, an application name, database name, integration name, and so on. This field is limited to 50 characters.
External Last Updated	The date and time when the data for this financial plan was last updated (from the external source).
Integration ID	The integration ID for this financial plan.
Description	The detailed description of the financial plan. This field is limited to 16350 characters.

Related Information

See the following topics for related, financial plan information:

- [Working with the Financial Plan Homepage](#) (on page 537)
- [Managing Financial Plans](#) (on page 538)

Financial Products

Use the Financial Products pages to create, update, and track any type of financial product.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial product information, the Financial Products tab might be excluded from your setup.

A *financial product* in Oracle CRM On Demand can be a specific physical good or service that a financial institution offers to its customers, or a grouping of financial products, but can also refer to any financial product from any financial institution.

Financial products can be used to track financial product types, such as loans, direct deposits (checking and savings accounts), market interest deposits (or money market accounts), time deposits (or certificates of deposits), and so on. Financial products can also be equities, derivatives, separate accounts, and hedge or mutual funds.

Using financial product records, financial institutions can view the details about financial products, including high-level product details, URL links to financial product Web sites, or catalogs. Using this feature, you can access the latest financial product details and related information about activities, opportunities, service requests, and calendars for your customers.

The financial product record type also supports financial-product hierarchies. These hierarchies allow the grouping of financial products into groups, for example, bundled offerings, mutual funds, or any other multihierarchy or multigroup that is required.

Some examples of financial-product hierarchies are shown in the following figures.

Figure 4 shows an example of a mutual fund hierarchy.

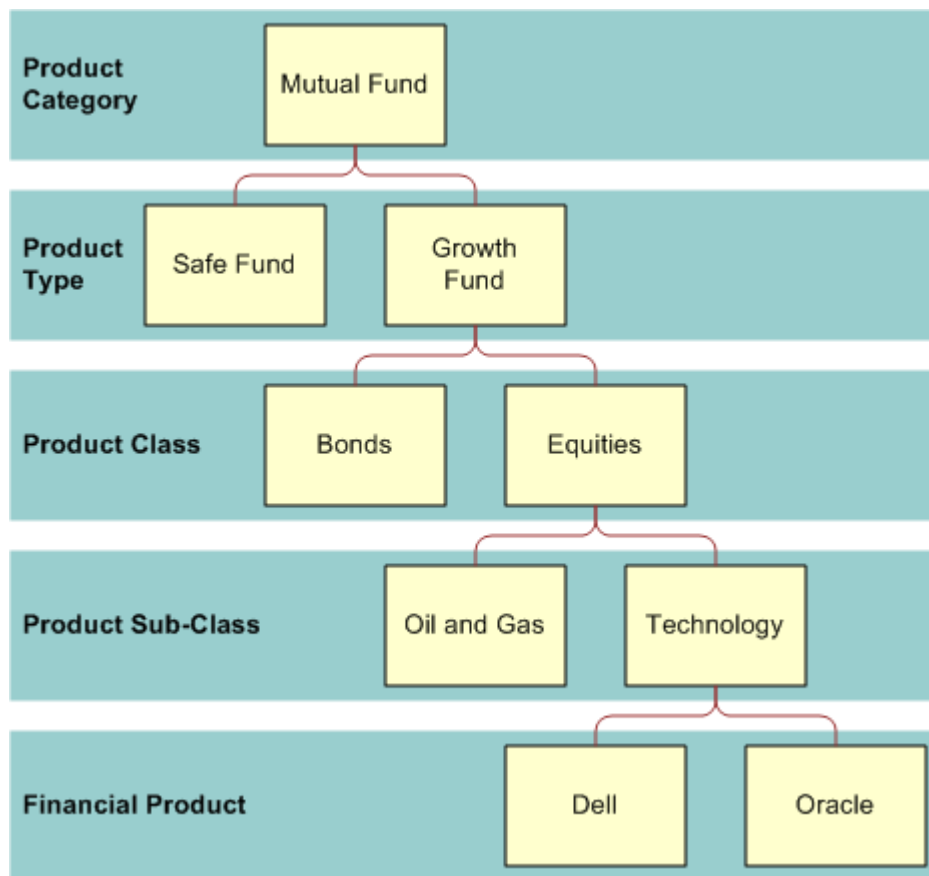


Figure 4: Mutual Fund Hierarchy Example

Figure 5 shows an example of an insurance policy hierarchy.

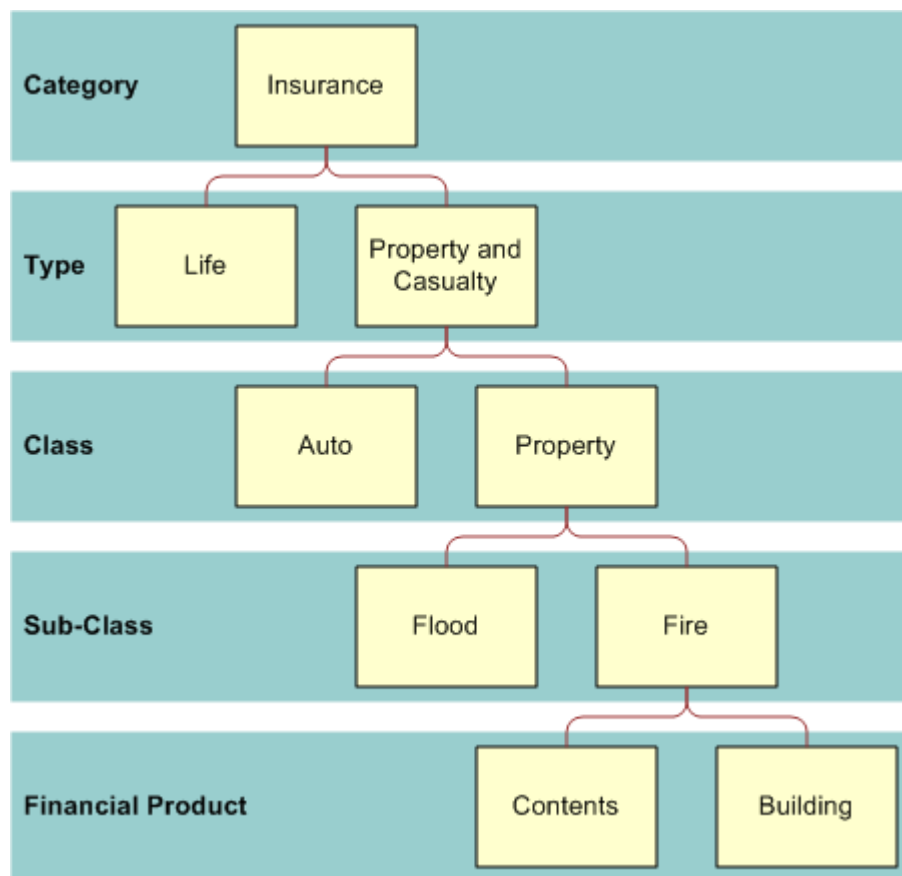


Figure 5: Insurance Policy Hierarchy Example

Working with the Financial Products Homepage

The Financial Products Homepage is the starting point for managing financial products.

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

Creating a Financial Product Record

You can create a financial product record by clicking the New button in the Recently Modified Financial Products section. For more information, see [Creating Records](#) (on page 38) and [Financial Products Fields](#) (on page 543).

TIP: You can indicate financial product hierarchies, such as an equity that is a subsidiary of a mutual fund by selecting the Parent Financial Product field. For information on financial product hierarchies, see [Tracking Parent Financial Products](#) (on page 543).

Working with Financial Product Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for financial products.

Financial Product List	Filters
All Financial Products	All financial products to which you have visibility regardless of who owns the financial products.
Recently Modified Financial Products	All financial products with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Products

The Recently Modified Financial Products section shows the financial products that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Product Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Financial Product Homepage, depending on which sections your company administrator has made available for display on your Financial Product Homepage.

The following procedure describes how to add sections to your Financial Product Homepage.

To add sections to your Financial Product Homepage

- 1 On the Financial Product Homepage, click Edit Layout.
- 2 On the Financial Product Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Financial Products

To manage financial products, do the following task:

- [Tracking Parent Financial Products](#) (on page 543)

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related financial product information:

- [Working with the Financial Plan Homepage](#) (on page 537)
- [Financial Product Fields](#) (see "[Financial Products Fields](#)" on page 543)

Tracking Parent Financial Products

To allow tracking of a financial product's parent-financial product, add the parent financial product to the Parent Financial Product Field on the child financial product.

To track a parent financial product

- 1 Select the financial product.
For more information on selecting a financial product, see [Finding Records](#) (on page 41).
- 2 On the Financial Product Detail page, click Edit.
- 3 On the Financial Product Edit page, select the Parent Financial Product field, and select a financial product.

Financial Products Fields

Use the Financial Products Edit page to add a financial product or update details for an existing financial product. The Financial Products Edit page shows the complete set of fields for a financial product.

TIP: You can also edit financial products on the Financial Products List page and the Financial Products Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Financial Product fields.

Field	Description
Financial Product Profile	
Financial Product Name	Common name of the financial product. Examples are: Oracle Corporation, Mutual Fund X, Gold Saving, Best Mortgage, and so on.
Category	Category of financial product. (The recommended hierarchy is as follows: type, category, class, subclass, financial product, child financial product, more children, if necessary.)
Type	Type of financial product. Examples: Growth Fund, Safe Fund.
Class	Class of financial product. Examples: Equities, Bonds.
Sub-Class	Subclass of the financial product. Examples: Technology, Oil & Gas.
Parent Financial Product	Parent financial product of this product.
Financial Product ID	Financial product ID that the financial institution uses to identify a financial product in its financial product hub or equivalent entity.
MDM Product Hub ID	Financial product ID that the financial industry or external company uses to identify a financial product in an external master data management (MDM) financial product hub.
Current Price	Price of the financial product. The price can come from an external source such as market pricing, or internally, from a price list.
Price Source	Source of the price information for the financial product, for example, an application name, database name, integration name, and so on.
Current Price Last Updated	Date and time when the price for this financial product was last updated (from the price source).
Product Catalog	
Product URL	URL for the catalog location of this financial product. It is usually an external financial product and URL.
Product Overview	Summary or introduction information about the financial product. This field has a limit of 16350 characters.
Product Catalog	URL for a financial product catalog that contains this financial product. The URL is usually an internal financial product URL.

Field	Description
Financial Product Overview	
External ID	External source ID of the external information about the financial-product holder. This field has a limit of 50 characters.
External Source	Source of the external information about the financial product, for example, an application name, database name, integration name, and so on.
External Last Updated	Date and time when the data for this financial product was last updated (from the external source).

Related Topics

See the following topics for related, financial product information:

- [Financial Products](#) (on page 539)
- [Working with the Financial Products Homepage](#) (on page 541)
- [Managing Financial Products](#) (on page 543)

Financial Transactions

Use the Financial Transactions pages to create, update, and track any type of financial transaction for a specific financial account. *Financial transactions* are the individual transactions of a financial account for all financial products.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial transaction information, the Financial Transaction tab might be excluded from your setup.

The financial transaction records enable you to determine which financial accounts have which transactions in relation to all financial products. This information provides a complete view of financial transactions, organized by financial account. You can use financial transaction records to track all types of financial product transactions, such as a buy, sell, big ticket, redemption, deposit, withdrawal, and any other instrument defined by you within financial products.

Using financial transactions, financial institutions can deliver summary information from their middle-office or back-office applications about customer financial accounts. This information provides views that are based on clients or households. The detailed information about the financial transactions, such as quantity, prices, and important dates (such as purchase dates) is available to you within Oracle CRM On Demand when you are managing the relationship with the client.

Working with the Financial Transaction Homepage

The Financial Transaction Homepage is the starting point for managing financial transactions.

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

Creating a Financial Transaction

You can create a financial transaction by clicking the New button in the Recently Modified Financial Transaction section. For more information, see [Creating Records](#) (on page 38) and [Financial Transaction Fields](#) (on page 547).

Working with Financial Transaction Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for financial transactions:

Financial Transaction List	Filters
All Financial Transactions	All financial transactions to which you have visibility, regardless of who owns the financial transaction
Recently Modified Financial Transactions	All financial transactions, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Transactions

The Recently Modified Financial Transactions section shows the financial transactions that were most recently modified, sorted by the modified date.

To expand the list, click Show Full List.

Adding Sections to Your Financial Transaction Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Financial Transaction Homepage, depending on what your company administrator has set up.

The following procedure describes how to add sections to your Financial Transaction Homepage.

To add sections to your Financial Transaction Homepage

- 1 On the Financial Transaction Homepage, click Edit Layout.
- 2 On the Financial Transaction Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Financial Transactions

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Financial Transaction Fields

Use the Financial Transaction Edit page to add a financial transaction, or to update details of an existing financial transaction. The Financial Transaction Edit page shows the complete set of fields for a financial transaction.

TIP: You can also edit financial transaction information on the Financial Transaction List page and the Financial Transaction Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Transaction Profile	
Financial Account	The financial account with which the financial transaction is associated.
Financial Product	The financial product with which the financial transaction is associated.

Field	Description
Transaction Type	The type of financial transaction. Some examples are: a buy, sell, big ticket, redemption, and so on.
Quantity	The number of financial product units for this financial transaction. This information usually comes from an external source.
Transaction ID	The ID of the financial transaction. This field has a limit of 50 characters.
Transaction Period	The period of the financial transaction. Some examples are: big tickets for date, month, quarter, and so on.
Transaction Price	The price of the financial product for this financial transaction. This information usually comes from an external source.
Transaction Date Time	The date and time of the financial transaction. This information usually comes from an external source.
Value	The value of the financial transaction (that is, the price multiplied by the quantity). This information usually comes from an external source.
Financial Transaction Integration	
Transaction Source	The source that your financial institution uses to identify a financial transaction in the middle-office or back-office application.
Integration ID	The integration ID of the external information about the financial transaction. This field has a limit of 50 characters.
External ID	The external source ID of the external information about the financial transaction. This field has a limit of 50 characters.
External Source	The source of the external information about the financial transaction, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this financial transaction was last updated (from the external source).

10 Insurance

Oracle CRM On Demand provides the following record types for insurance information:

- **Claims (on page 553).** Use these pages to manage information about insurance claims.
- **Coverages (on page 559).** Use these pages to manage the monetary limits and risks covered by an insurance policy.
- **Damages (on page 563).** Use these pages to manage information about damage to the insured property of a contact.
- **Insurance Properties (on page 566).** Use these pages to manage information about insured property.
- **Involved Parties (on page 569).** Use these pages to manage information about contacts involved in insurance claims.
- **Policies (on page 572).** Use these pages to manage information about insurance policies.
- **Policy Holders (on page 577).** Use these pages to manage information about holders of insurance policies.
- **Broker Profile (on page 580).** Use these pages to manage information about brokers.

Note: All of these record types are available only with Oracle CRM On Demand Financial Services Edition.

Managing Insurance

To manage insurance, perform the following processes:

- [Process of Performing Channel Planning](#) (on page 550)
- [Process of Producing Claims First Notice of Loss](#) (on page 550)
- [Process of Recruiting and Establishing Agent-Broker Relationships](#) (on page 550)
- [Process of Managing Agent-Broker Relationships](#) (on page 551)
- [Process of Planning Sales and Budgeting](#) (on page 551)
- [Process of Converting Insurance Leads to Clients with the Producer Success Model](#) (on page 552)
- [Process of Managing Service Requests](#) (on page 551)
-

Note: Some of these processes are performed in Oracle CRM On Demand, while others are performed outside of Oracle CRM On Demand.

Process of Performing Channel Planning

Channel planning entails developing a strategy and planning activities performed by a channel manager for the channels under his or her responsibility.

To perform channel planning, do the following tasks:

- 1 Create a business plan, see [Business Planning](#) (on page 243).
- 2 Create objectives for a business plan, see [Objectives](#) (on page 253).
- 3 Manage plan accounts, see [Plan Accounts](#) (on page 258).
- 4 Manage plan contacts, see [Plan Contacts](#) (on page 262).
- 5 Manage plan opportunities, see [Plan Opportunities](#) (on page 265).

Process of Producing Claims First Notice of Loss

First notice of loss involves producing customer claims reports, which include information about the claim and claimant. This report includes the coverage verification, which the call center agent provides. The call center agent validates the policy and coverage information.

To create a claims first notice of loss, perform the following tasks:

- 1 Validate the policy and coverage information provided by the claimant, see [Policies](#) (on page 572).
- 2 Create the claims record, see [Claims](#) (on page 553).
- 3 Enter information about the first notice of loss, see [Claims](#) (on page 553).

Process of Recruiting and Establishing Agent-Broker Relationships

Setting up agent-broker relationships includes the planning and execution of marketing campaigns that are targeted at potential agents, as well as setting up new agents.

To recruit new agents and set up agent-broker relationships, perform the following tasks:

- 1 Create a campaign record, see [Creating Records](#) (on page 38) and [Campaign Fields](#) (on page 154).
- 2 Associate potential agents with a campaign, see [Targeting Contacts for Campaigns](#) (on page 152).
- 3 Execute the marketing campaign, see [Process of Handling Campaigns](#) (on page 147).
- 4 Manage applications from agents and approve new agents.

- 5 Set up the new approved agents, see [Creating Records](#) (on page 38) and [Partner Fields](#) (on page 319).

Process of Managing Agent-Broker Relationships

Managing agent-broker relationships involves communicating with agents and monitoring agent-broker relationships, updating information about agent demographics, monitoring credentials, book maintenance, and so on.

To manage agent-broker relationships, perform the following tasks:

- 1 Update information about agents and agencies, see [Updating Record Details](#) (on page 60).
- 2 Monitor credentials for agents and agencies, see [Managing Partner Accounts](#) (on page 316).
- 3 Manage the business plan, see [Managing Business Plans](#) (on page 249).
- 4 Monitor the opportunities and service requests from agents and agencies, see [Managing Opportunities](#) (on page 214) and [Managing Service Requests](#) (on page 273).

Process of Planning Sales and Budgeting

Insurance sales-planning includes sales planning for the year, quarter, or another period. It also includes managing sales plans, for example, managing sales budgets, managing sales forecasts, and territories.

To plan sales and budgeting, perform the following tasks:

- 1 Perform the sales planning for the year, quarter, or another period, see [Business Planning](#) (on page 243).
- 2 Manage the sales budgets and quota, see [Forecasts](#) (on page 228).
- 3 Manage the sales forecasts, see [Forecasts](#) (on page 228).
- 4 Manage the territories, see [Territory Management](#) (on page 1208).

Process of Managing Service Requests

Managing service requests involves handling general inquiries and resolving single service requests from start to finish. It also includes evaluating service issues and prioritizing requests.

To manage service requests, perform the following tasks:

- 1 Create the service request, see [Service Requests](#) (on page 270).

- 2 Assign or escalate a service request, see [Assigning Service Requests](#) (on page 273) or [Escalating Service Requests](#) (on page 275).
- 3 Work with solutions for a service request, see [Adding Solutions to Service Requests](#) (on page 275).
- 4 Close the resolved service request, see [Closing Resolved Service Requests](#) (on page 276).

Process of Converting Insurance Leads to Clients with the Producer Success Model

In Oracle CRM On Demand, you can use workflow rules to specify that one or more actions must be performed automatically each time a specified event occurs. You can configure as many workflow rules as you want to implement your business processes.

The Producer Success Model (PSM) in Oracle CRM On Demand is a framework that uses workflow rules to automate the creation of activities, allowing insurance agents or financial advisors to follow up their leads and stay in touch with their clients on a regular basis.

In the Producer Success Model, the following terms are used:

- **Producer.** A *producer* is an insurance agent or financial advisor.
- **Client.** A *client* is a contact with whom your company maintains a relationship on a long-term basis so that you can monitor changes in the client's situation and identify opportunities to cross sell additional products to the client. Clients usually also seek advice on which products fit their needs.

The Producer Success Model uses workflow rules to do the following:

- Create a task to call the lead on the next working day every time a lead record is created.
- Create a follow-up task when a producer updates the value in the Call Result field in the Task Detail page after making a call to a lead or a client.

The types of calls that producers make to leads or clients include the following:

- **Referral calls.** Calls that producers must make to follow up on leads.
- **Birthday calls.** Calls that producers make to existing leads or clients on their birthday.
- **Review calls.** Calls that producers make to leads or clients when it has been six months since the last call with the lead.

A producer can capture the result of these calls in the Call Result field on the Task Detail page. The values for the Call Result field include the following:

- **No Reach.** The lead is unreachable.
- **Stay In Touch.** The lead or contact does not want to talk today, but the lead wants the producer to stay in touch.
- **Dead File.** The lead does not want to talk today and does not want to be contacted again.
- **Appointment.** The lead or client is ready for an appointment.

Depending on the result of the calls, the workflow will create different followup tasks. For example, if the result of the call is No Reach, the workflow creates a task to call the same lead or client the next day. If the

result of the call is Stay in Touch, the workflow creates a task to call the lead or client six months from now or one week prior to the birthday, whichever is sooner.

NOTE: The Producer Success Model requires the configuration of workflow rules and actions. For details, see the configuration documentation for Oracle On Demand Financial Services Edition.

To convert insurance leads to clients with the Producer Success Model, perform the following tasks:

- 1** Create a new lead record for the referral.
A workflow rule automatically creates a task to call the lead on the next working day.
- 2** In the Activity List page, view the daily call list of referral calls and call the lead, see [Working with Activity Lists](#) (on page 121).
- 3** Record the call result information in the Call Result field.
Depending on the call result, the workflow creates a followup task.
- 4** Schedule an appointment to meet the lead, see [Scheduling Appointments with Others](#) (on page 138).
- 5** Meet with the qualified lead and collect additional information.
- 6** Upgrade the lead to a prospect by selecting Prospect from the Lead Type picklist, see [Leads Fields](#) (on page 170).
- 7** Offer products to meet the prospect's needs and create an opportunity if the customer is interested, see [Working with the Opportunity Homepage](#) (on page 212).
- 8** Conduct a closing interview and sell the products.
- 9** When the customer purchases the product, upgrade the contact to a client by selecting Client from the Contact Type picklist.
- 10** On the Contact Detail page, set the Call Frequency field to 1-2 Times/Year. For more information on the Create Task workflow, see [Creating Workflow Actions: Create Task](#) (on page 1228).

Claims

Use the Claim pages to create, update, and track any type of claim. Claims are typically the claims of a contact or business that an insurance company manages.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking claims information, the Claims tab might be excluded from your setup.

A *claim* is a formal, written demand to an insurance company to reimburse the loss of, or damage to, an insured object.

Understanding a customer's claim history, including the current claim status, can help sales and service personnel become more knowledgeable about this important aspect of the insurer-customer relationship. Insurers can also use the Claim pages to record critical information quickly regarding the first notice of loss, and accurately route the claim to the appropriate personnel.

The claim record type supports all types of first-notice-of-loss claims, such as auto, property, general liability, and so on. A claim can have parent claims, so all types of claim structures and hierarchies are supported, for example, you can organize claims into claim groups.

You can use the Claim Detail page to identify and capture profile and detailed information about a claim. You can also use the Claim Detail page to review a claim's child claims and other related information including:

- [Involved Parties](#) (on page 569)

- [Damages](#) (on page 563)

- Activities

An activity can be related to a claim. You can view all activities related to a claim on the Claim Detail page.

- Service requests

A service request can be related to a claim. You can view all service requests related to a claim on the Claim Detail page.

Working with the Claim Homepage

The Claim Homepage is the starting point for managing claims. This page contains several sections and displays information that is relevant to you.

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

Creating a Claim

You can create a claim by clicking the New button in the Recently Modified Claims section. For more information, see [Creating Records](#) (on page 38) and [Claim Fields](#) (on page 556).

Working with Claims Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for claims.

Claims List	Filters
All Claims	All claims to which you have visibility, regardless of who owns the claim.
Recently Modified Claims	All claims, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Claims Section

The Recently Modified Claims section shows the claims that were most recently modified, sorted by the modified date. To expand the list, click the Show Full List link. The following procedure describes how to add sections to the Claims Homepage.

Adding Sections to Your Claims Homepage

If your user role includes the Personalize Homepage privilege, you can add additional sections to your Claims Homepage, depending on which sections your company administrator has made available for display on your Claims Homepage.

To add sections to your Claims Homepage

- 1 On the Claims Homepage, click the Edit Layout link.
- 2 On the Claims Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Information

See the following topics for related claims information:

- [Claim Fields](#) (on page 556)
- [Managing Claims](#) (on page 555)

Managing Claims

Click a topic to see step-by-step procedures to do the following:

- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Tracking Parent Claims](#) (on page 556)

For additional procedures that are common to all records, see [Working with Records](#) (on page 38).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in picklists. So, the information you see might differ from the

standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all the procedures described in the preceding list.

Related Information

See the following topics for related claims information:

- [Working with the Claims Homepage](#) (see "[Working with the Claim Homepage](#)" on page 554)
- [Claim Fields](#) (on page 556)

Tracking Parent Claims

To allow tracking of a parent claim, add the parent claim to the Parent Claim field on the child claim record.

To track a parent claim

- 1 Select the claim.
For information on selecting a claim, see [Finding Records](#) (on page 41).
- 2 On the Claim Detail page, click Edit.
- 3 On the Claim Edit page, select the Parent Claim field, and select a claim.

Claim Fields

Use the Claim Edit page to add a new claim, or to update details for an existing claim. The Claim Edit page shows the complete set of fields for a claim.

TIP: You can also edit a claim on the Claim List page and the Claim Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Claim Profile	
Claim #	The claim identifier.
Line of Business	The line of insurance business, such as auto, property, general liability,

Field	Description
	workers compensation, life.
Loss Code	The code for a particular loss, for example, insurance companies can assign 100 for auto accident, 200 for theft, and so on.
Loss Type	The type of the loss, which is related to the loss code. Examples of loss type are: auto accident, theft, and so on.
Report Date	The date when the insured person reported the claim for the accident.
Loss Date and Time	The date of the accident, or the date of the loss.
Currency	The currency for the claim.
Closed Date	The date when the claim was closed.
Event #	The number that identifies an event. Insurance companies typically categorize a catastrophic event. Some examples of event numbers are: 1002 for Hurricane Ike, 1003 for Hurricane Andrew, and so on.
Status	The status of the claim, for example, loss report, open, or reviewed, and closed.
Claim Details	
Kind of Loss	The type of loss, such as fire, theft, injury, wind, flood, hail, or other.
Category of Loss	The category of loss that most insurance companies use to categorize the loss. Some examples are: A. dwelling; B. other structures; C. personal property; D. loss of use.
Location of Loss	The location of the loss, such as in parking garage, in shopping mall, and so on.
Amount of Loss	The loss amount that the customer has incurred. If the total of a given loss exceeds the liability amount, the customer might have to pay the rest.
Liability Source	The source of the liability that caused this claim. Some examples are: injured employee, property of employee damaged, injured private person, property of private person, slip and fall, or vehicular injury.
Amount of Liability	The amount that must be paid if there is a loss.
Relationship to Insured	The relationship of the injured to the insured. Some examples are: employer, supervisor, or colleague.
Place of Injury	The location where the injury occurred.
Date Employer Aware of Injury	The date the employer became aware of an employee injury.
Date Employer Aware of Claim	The date when the employer became aware of an employee claim.

Field	Description
# of People Injured	The number of people injured in the accident. Some of these people might be employees, and some might not.
# of Employee Injured	The number of employees injured in the accident.
Part of Body Injured	The part of the body that is injured, such as hand, leg, neck, and so on.
Type of Injury	The injury type, such as burn, fracture, sprain, repetitive stress.
Medical Injury Code	The code for a particular medical injury, such as IDC-9, IDC-10.
Ability to Work	Indicates whether the employee can still work because of this injury.
Class of Employee	An employee class, such as secretary, manager, and so on.
Injured During Working Hours ?	Indicates whether the injury occurred during working hours or not.
Hospital Name	The name of the hospital that treated the claimant's injury.
Time of Death	The time when the injured person died.
Police/ Coroner Report #	The report number of the police or coroner's report related to a worker's compensation claim.
Claim Integration	
External System Id	Tracks the external source ID of the external information for this claim. This field has a limit of 50 characters.
External Source	The source of the external information about the claim, for example, an application name, database name, integration name, and so on.
External Last Update	Tracks the date and time of the last external update of data of this claim. The date and time when the data for this policy was last updated (from the external source).
Claim Policy	
Policy	The insurance policy that is linked to this claim.
Reported By	The designation of the person who reported the accident. Some examples are: named insured, driver of insured vehicle, or agent.
Reporter Contact Info	The contact information of the person reporting the accident.
Conditions	The conditions when the accident occurred, such as weather conditions, for example, <i>It was raining that day.</i>
At Fault	Identifies who is at fault. Some examples are: insured driver and other driver.
Police/Fire Department	The police or fire station where the report was written.
Report #	The report number that is related to the accident.

Field	Description
Comments	The detailed description of the claim.
Loss Description	The description of the loss, for example, car hit by a truck.
Business Account	The business account that is linked to this claim.
Address	The address where the claim occurred. The address might be different from any other address in Oracle CRM On Demand, and is not related to a contact or business address, or a property address. This address is required and is relevant and appropriate only for this claim record.
City	The city where the claim occurred. The city might be different from any other city in Oracle CRM On Demand, and might not be related to a contact or business city record, or property city. The city name is required and is relevant and appropriate only for this claim record.
State	The state (in jurisdictions such as the United States that use states) or province (in jurisdictions such as Canada that use provinces) where the claim occurred. For example, CA for California, or ON for Ontario.
ZIP/Postal Code	The ZIP code (in the United States) or the postal code (in other jurisdictions) of the location of the accident.

Related Information

See the following topics for related claims information:

- [Working with the Claims Homepage](#) (see "[Working with the Claim Homepage](#)" on page 554)
- [Managing Claims](#) (on page 555)

Coverages

Use the Coverage pages to create, update, and track any type of insurance coverage. Coverages are typically the monetary limits and risks covered in an insurance policy for a contact.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking coverage information, the Coverage tab might be excluded from your setup.

Coverage is the monetary limits and risks that are covered in an insurance policy. To track coverages for the policies, you add them as coverages to the policy. You can use coverage to track all types of coverage, such as a collision, bodily injury, fire, and so on. You can use the Coverage pages to identify and profile coverages by capturing coverage information, such as the type of coverage, the individual limit, the total limit, deductible values, and so on.

Working with the Coverage Homepage

The Coverage Homepage is the starting point for managing coverage records.

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

Creating a Coverage Record

You can create a coverage record by clicking the New button in the Recently Modified Coverages section. For more information, see [Creating Records](#) (on page 38) and [Coverage Fields](#) (on page 561).

Working with Coverage Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for coverages.

Coverage List	Filters
All Coverages	All coverages to which you have visibility, regardless of who owns the coverage.
Recently Modified Coverages	All coverages with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Coverages

The Recently Modified Coverages section shows the coverages you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Coverage Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Coverage Homepage, depending on which sections your company administrator has made available for display on your Coverage Homepage.

To add sections to your Coverage Homepage

- 1 On the Coverage Homepage, click the Edit Layout link.
- 2 On the Coverage Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Information

See the following topics for related coverage information:

- [Coverage Fields](#) (on page 561)
- [Managing Coverages](#) (on page 561)

Managing Coverages

Click a topic to see step-by-step procedures to do the following:

- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)

For additional procedures that are common to all records, see [Working with Records](#) (on page 38).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in picklists. Therefore, the information that you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related coverage information:

- [Working with the Coverage Homepage](#) (on page 560)
- [Coverage Fields](#) (on page 561)

Coverage Fields

Use the Coverage Edit page to add a coverage record, or to update details for an existing coverage record. The Coverage Edit page shows the complete set of fields for a coverage record.

TIP: You can also edit a coverage record on the Coverage List page and the Coverage Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Coverage Profile	
Coverage Name	The unique name of the coverage.
Policy	The policy linked to this coverage.
Coverage	The type of coverage that the customer purchased in the policy to cover his or her liability. Some examples of coverage are: collision, comprehensive, bodily injury, medical payment.
Coverage Status	The status of the coverage, such as Pending, Open, and Closed.
Currency	The currency of the coverage.
Insured Property	The insurance property linked to the coverage record.
Individual Limit	The limit for an individual coverage. For example, the maximum amount that can be paid for a collision coverage might be \$100,000.
Total Limit	The total limit that can be paid out. For example, if the insured is involved in a collision between two cars, the total limit that might be paid out under the collision coverage for both cars could be limited to \$300,000.
Coverage Product	The insurance product associated with this coverage.
Coverage Detail	
Deductible	The amount that the customer must pay first before the insurance company pays. (The term <i>deductible</i> is also known as <i>excess</i> in some countries, such as the United Kingdom and Ireland.)
Begin	The date from which the coverage is in effect.
End	The date that the coverage ends.
Insured Amount	The amount that is insured.
Coverage Integration	
External System Id	Tracks the external source ID of the external information about the coverage. This field has a limit of 50 characters.
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the coverage record. This field has a limit of 50 characters.

Field	Description
External Last Update	The date and time when the data for this policy was last updated (from the external source).

Related Information

See the following topics for related coverage information:

- [Working with the Coverage Homepage](#) (on page 560)
- [Managing Coverages](#) (on page 561)

Damages

Use the Damage pages to identify and capture damage information, such as damage description and damage amount. *Damage* is impairment to property resulting in a loss of value. Damage is used in insurance claims to track the damage to property covered in a policy.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking damages information, the Damage tab might be excluded from your setup.

Working with the Damage Homepage

The Damage Homepage is the starting point for managing damages.

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

Creating a Damage Record

You can create a damage record by clicking the New button in the Recently Modified Damages section. For more information, see [Creating Records](#) (on page 38) and [Damage Fields](#) (on page 565).

Working with Damage Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for damages.

Damage List	Filters
All Damages	All damages to which you have visibility, regardless of who owns the damage record.

Damage List	Filters
Recently Modified Damages	All damages, sorted by the modified date.

To view a list, click on the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Damages

The Recently Modified Damages section shows the damage records that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Damage Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Damage Homepage, depending on what your company administrator has made available for display on your Damage Homepage.

The following procedure describes how to add sections to your Damage Homepage.

To add sections to your Damage Homepage

- 1 On the Damage Homepage, click Edit Layout.
- 2 On the Damage Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Topics

See the following topics for related damages information:

- [Damage Fields](#) (on page 565)
- [Managing Damages](#) (on page 564)

Managing Damages

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)

- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related damage information:

- [Working with the Damage Homepage](#) (on page 563)
- [Damage Fields](#) (on page 565)

Damage Fields

Use the Damage Edit page to add a damage record, or update the details for an existing damage record. The Damage Edit page shows the complete set of fields for a damage record.

TIP: You can also edit damage records on the Damage List page and the Damage Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Damage Profile	
Claim	The claim linked to the damage record.
Insurance Property	The insured property linked to the damage record.
Damage Name	The unique name of the damage. This field has a limit of 50 characters.
Damaged Property Description	The description of the damaged property, for example, car BMW. This field has a limit of 16,350 characters.
Damage Description	The description of the damage, for example, <i>front-right light is damaged</i> . This field has a limit of 16,350 characters.
Currency	The currency for the damage.

Field	Description
Property #	The number of the property, for example, property 1, property 2, and so on. For example, if a policy has three cars, you can number the cars as follows: 1 is Toyota Corolla, 2 is Mazda Miata, and 3 is Hyundai Pony.
Damaged Property Type	The type of property, such as motorcycle, motor home, private passenger, house, and so on.
Estimate Amount	An estimate of the amount of damage on the insured property.
Damage Integration	
External System Id	Tracks the external source ID of the external information about the damage record. This field has a limit of 50 characters.
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the damage record. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this policy was last updated (from the external source).

Related Topics

See the following topics for related damage information:

- [Working with the Damage Homepage](#) (on page 563)
- [Managing Damages](#) (on page 564)

Insurance Properties

Use the Insurance Properties pages to create, update, and track insurance properties accounts. An insurance properties record allows contacts to be grouped together and their related information to be rolled up from the contacts who are linked to the insurance property.

An *insurance property* is a tangible asset to which a contact or business owner has a legal title. The owner purchases the insurance policy to protect the physical property against loss from theft, fire, and other perils. This term (insurance property) is also used in a claim. The owner can specify which insurance property is damaged in an incident. You can use an insurance property record to track all types of insured property, such as a car, a boat, jewelry, a house, and so on.

You can use the Insurance Property pages to identify and profile insurance property by capturing information such as make, model, construction year, license number, and so on. You can also use the Insurance Property pages to review other related information. For more information, see [Coverages](#) (on page 559) and [Damages](#) (on page 563).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking insurance property information, the Insurance Properties tab might be excluded from your setup.

Working with the Insurance Property Homepage

The Insurance Property Homepage is the starting point for managing insurance property records.

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

Creating an Insurance Property Record

You can create an insurance property record by clicking the New button in the Recently Modified Insurance Properties section. For more information, see [Creating Records](#) (on page 38) and [Insurance Properties Fields](#) (on page 568).

Working with Insurance Property Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists that are available for insurance properties.

Insurance Property List	Filters
All Insurance Properties	All insurance properties to which you have visibility
Recently Modified Insurance Properties	All insurance properties with your name in the Owner field, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Insurance Properties Section

The Recently Modified Insurance Properties section shows the insurance properties that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Insurance Property Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Insurance Property Homepage, depending on which sections your company administrator has made available for display on your Insurance Property Homepage.

The following procedure describes how to add sections to your Insurance Property Homepage.

To add sections to your Insurance Property Homepage

- 1** On the Insurance Property Homepage, click Edit Layout.
- 2** On the Insurance Property Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3** Click Save.

Managing Insurance Properties

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Insurance Properties Fields

Use the Insurance Property Edit page to add an insurance property record or update the details of an existing insurance property. The Insurance Property Edit page shows the complete set of fields for an insurance property.

TIP: You can also edit an insurance property on the Insurance Property List page and the Insurance Property Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Property Profile	
Policy	The policy linked to the insurance property.
Sequence	The sequence number for the insurance property. For example, you might have three cars for a policy, sequence number 1 might be for Toyota Corolla, 2 for Mazda Miata, and 3 for a Hyundai car.
Type	The type of the insurance property, such as a motorcycle, a motor home, a private passenger car, a family home, and so on.
Description	A detailed description of the insurance property. This field has a limit of 16,350 characters.
Amount	The amount insured for the insurance property.
Currency	The currency for the insurance property.
Property Integration	
External ID	Tracks the external source ID of the external information about the claim. This field has a limit of 50 characters.
External Source	The source of the external information about the insurance property, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external system. This field has a limit of 50 characters.

Involved Parties

Use the Involved Party pages to create, update, and track any type of involved party. The involved party tracks the relationship between contacts and claims.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking involved party information, the Involved Parties tab might be excluded from your setup.

An *involved party* is a contact involved in an insurance claim. Each contact might have a role in a claim. You can use the Involved Parties tab to track the contact's relationship with the claims. Some examples of the role of contacts in a claim are: claimant, insured driver, and lawyer. You can use the Involved Party pages to identify and profile an involved party.

Working with the Involved Party Homepage

The Involved Party Homepage is the starting point for managing involved parties.

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

Creating an Involved Party Record

You can create an involved party record by clicking the New button in the Recently Modified Involved Parties section. For more information, see [Creating Records](#) (on page 38) and [Involved Party Fields](#) (on page 571).

Working with Involved Party Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists.

Involved Party List	Filters
All Involved Parties	All involved parties to which you have visibility, regardless of who owns the involved party.
Recently Modified Involved Parties	All involved parties with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Involved Parties

The Recently Modified Involved Parties section shows the involved parties whom you modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Involved Party Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Involved Party Homepage, depending on which sections your company administrator has made available for display on your Involved Party Homepage.

The following procedure describes how to add sections to your Involved Party Homepage.

To add sections to your Involved Party Homepage

- 1 On the Involved Party Homepage, click Edit Layout.

- 2 On the Involved Party Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Involved Parties

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Involved Party Fields

Use the Involved Party Edit page to add an involved party, or update the details of an existing involved party. The Involved Party Edit page shows the complete set of fields for an involved party.

TIP: You can also edit an involved party on the Involved Party List page and the Involved Party Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Involved Party fields.

Field	Description
Involved Party Profile	
Claim	The claim linked to this involved party.
Contact	Contact name for the claim.
Involved Party Name	The unique name of the involved party.
Role	The role of the contact in the claims. Some examples are: adverse claimant, claimant, witness, lawyer, and insured spouse.

Field	Description
Currency	The currency for the involved party.
Role in Accident	The role of the involved party in the accident. Some examples are: driver, passenger, and pedestrian.
Location	The location of the claimant when the accident happened. Some examples are: in involved vehicle, in uninvolved vehicle, and pedestrian.
Involved Party Details	
Injury Summary	The summary of the injury to the involved party. This field has a limit of 250 characters.
Injury Description	The detailed description of the injury to the involved party. This field has a limit of 16,350 characters.
Involved Party Integration	
External System ID	Tracks the external source ID of the external information about the involved party. This field has a limit of 50 characters.
External Source	The source of the external information about the involved party, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the involved party.
External Last Update	The date and time at which the data for this involved party was last updated (from the external source).

Policies

Use the Policy pages to create, update, and track any type of insurance policy. Policies are generally the policies of a contact or business that the insurance company manages, but can also track all policies of a contact or business, including those at other insurance companies.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking policy information, the Policy tab might be excluded from your setup.

A *policy* is a written agreement between the insurer and the policy holder, in which the insurer commits to providing the insurance benefit on the occurrence of an insurable event, and in which the policyholder commits to paying the premium. Policies provide a structure for insurers to manage both contact and business relationships.

The policy record type enables insurers to move from policy-centric relationships to client and household-centric relationships by having access to high-level policy information. The policy information (for example, type, status, and effective date within Oracle CRM On Demand) supports engagements of

client-household centric relationships, such as activities, claims, and calendar. You can use the policy record type to track all types of policies, such as auto, property, general liability, and other types of policies. A policy can have parent policies, thus all types of policy structures and hierarchies are supported. These policy hierarchies support the grouping of policies into policy groups, providing the flexibility to enable any policy structure that is required.

Profile and Related Information About Policies

You can use the Policy pages to identify and capture profile and detailed information about a policy. You can also use the Policy pages to review a policy's child policies and other related information including:

- [Policy Holders](#) (on page 577)
- [Claims](#) (on page 553)
- [Insurance Properties](#) (on page 566)
- [Coverages](#) (on page 559)
- **Activities.** An activity can be related to a policy. On the Policy Homepage you can display activities related to a policy. For more information, see [Working with the Policy Homepage](#) (on page 573).
- **Service requests.** A service request can be related to a policy. On the Policy Homepage, you can display service requests related to a policy. For more information about service requests, see [Service Requests](#) (on page 270).

Working with the Policy Homepage

The Policy Homepage is the starting point for managing policies.

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

Creating a Policy

You can create a policy by clicking the New button in the Recently Modified Policy section. For more information, see [Creating Records](#) (on page 38) and [Policy Fields](#) (on page 575).

Working with Policy Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for policies.

Policy List	Filters
All Policies	All policies to which you have visibility, regardless of who owns the record

Policy List	Filters
Recently Modified Policies	All policies with your name in the Owner field, sorted by the modified date.
My Policies	Policies with your name in the Owner field.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Policies

The Recently Modified Policies section shows the policies that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Policy Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Policy Homepage, depending on which sections your company administrator has made available for display on your Policy Homepage.

The following procedure describes how to add sections to your Policy Homepage.

To add sections to your Policy Homepage

- 1 On the Policy Homepage, click Edit Layout.
- 2 On the Policy Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Managing Policies

To manage policies, do the following task: [Tracking Parent Policies](#) (on page 575).

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

■ [Working with Attachments](#) (on page 91)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Tracking Parent Policies

To allow tracking of a policy's parent policy, add the parent policy to the Parent Policy Field on the child policy.

To track a parent policy

- 1 Select a policy.

For information on selecting a policy, see [Finding Records](#) (on page 41).

- 2 On the Policy Detail page, click Edit.

- 3 On the Policy Edit page, select the Parent Policy field, and select a policy.

Policy Fields

Use the Policy Edit page to add a policy or update the details of an existing policy. The Policy Edit page shows the complete set of fields for a policy.

You can also edit a policy record on the Policy List page and the Policy Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

TIP: You can indicate policy hierarchies, in which a policy is a child of another policy, by selecting a parent policy within a policy record. For information on tracking parent policies, see [Tracking Parent Policies](#) (on page 575).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the policy fields.

Field	Description
Policy Profile	
Policy #	The policy number that is usually generated by the policy system.
Policy Type	The type of the policy, such as auto, property, general liability, workers compensation, or life.

Field	Description
Status	The policy status, such as new business, in force, pending, terminated, renewal, or quote.
Sub Status	The policy substatus, such as not submitted, broker review, cancelled, or expired.
Currency	The currency for the policy.
Effective Date	The date from which the policy is effective.
Expiration Date	The date when the policy expired.
Cancelled Date	The date when the policy was cancelled.
Rate State	The rate that can be applied to a policy in a particular state.
Rate Plan	The rate plan for this policy. Each insurance company might have different rate tiers for a policy. Some example values are: 01, 02, 03, and so on.
Policy Integration	
External System ID	Tracks the external source ID of the external information about the policy. This field has a limit of 50 characters.
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the policy. This field has a limit of 50 characters.
External Last Updated	The date and time at which the data for this policy was last updated from the external source.
Policy Agent	
Primary Agency	The primary agency that initiated the policy.
Primary Agent	The primary agent who handles this policy.
Referral Source	The referral source, such as the Internet, direct mail, magazine ad, and client referral.
Producer Code	The code for the producer who brought this policy to the insurer.
Face Amount	The amount stated on the insurance policy to be paid upon death or maturity.
Total Premium	The total premium for this policy.
Billing Status	The status of the policy billing, such as billed, lapsed,

Field	Description
	or paid.
Invoice Due Date	The date the policy invoice is due.
Term	The term of the policy, for example, 1 year, 2 year, and so on.
Policy Pay Method	The method that the customer uses to pay for the policy, such as cash, charged, check, or electronic fund transfer.

Policy Holders

Use the Policy Holder pages to create, update, and track any type of policy holder. A *policy holder* is typically the contact who owns the policy that the insurance company manages.

A policy holder record is used to track the relationship between contacts and policies. It captures all types of roles that the contact can have in a policy. Example roles are: insured, primary driver, beneficiary, and so on. You can create other roles, as needed. For information about setting up fields and field values, see [Creating and Editing Fields](#) (on page 1043).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking policy holder information, the Policy Holders tab might be excluded from your setup.

Working with the Policy Holder Homepage

The Policy Holder Homepage is the starting point for managing policy holders.

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

Creating a Policy Holder

You can create a policy holder by clicking the New button in the Recently Modified Policy Holders section. For more information, see [Creating Records](#) (on page 38) and [Policy Holder Fields](#) (on page 579).

Working with Policy Holder Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for policy holders.

Policy Holder List	Filters
All Policy Holders	All policy holders to which you have visibility, regardless of who owns the policy holder
Recently Modified Policy Holders	All policy holders, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Policy Holders

The Recently Modified Policy Holders section shows the policy holders that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Policy Holder Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Policy Holder Homepage, depending on which sections your company administrator has made available for display on your Policy Holder Homepage.

The following procedure describes how to add sections to your Policy Holder Homepage.

To add sections to your Policy Holder Homepage

- 1 On the Policy Holder Homepage, click Edit Layout.
- 2 On the Policy Holder Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Topics

See the following topics for related information:

- [Managing Policy Holders](#) (on page 579)
- [Policy Holder Fields](#) (on page 579)

Managing Policy Holders

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- [Working with the Policy Holder Homepage](#) (on page 577)
- [Policy Holder Fields](#) (on page 579)

Policy Holder Fields

Use the Policy Holder Edit page to add a policy holder, or to update details of an existing policy holder. The Policy Holder Edit page shows the complete set of fields for a policy holder.

TIP: You can also edit policy holder information on the Policy Holder List page and the Policy Holder Detail page. For more information on updating records, see [Updating Record Details](#) (on page 60).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Policy Holder Profile	
Policy	The policy linked to this policy holder.
Contact Holder	The contact name for the policy.
Policy Holder Name	The unique name of the policy holder.
Role	The role of the contact in this policy. Some example roles are: insured, primary driver, and beneficiary.
Currency	The currency of the policy holder.

Field	Description
Insured Type	The insured type for each contact in the policy, such as primary, or secondary.
Percentage	The percentage of the policy that the holder owns. For example, for a life policy, customers can receive the proceeds of the policy, based on this percentage.
Policy Holder Integration	
External System ID	The external source ID of the external information about the policy holder. This field has a limit of 50 characters.
External Source	The source of the external information about the policy holder, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.
Integration ID	The integration ID of the external information about the policy holder. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this policy holder was last updated (from the external source).

Related Topics

See the following topic for related information:

- [Working with the Policy Holder Homepage](#) (on page 577)

Broker Profile

The Broker Profile tab represents any insurance broker who sells or services insurance products. Every year, the channel manager usually meets with each broker and creates a new broker profile for the year. The broker profile captures demographic information about a broker for a particular year.

The Broker Profile pages in Oracle CRM On Demand enable you to capture demographic information about the partner, such as the broker name, address, phone numbers, fax number, Web site, revenue, description of business, and so on. The broker profile is a child of the partner. For more information about partners, see [Partners](#) (on page 314).

Working with the Broker Profiles Homepage

The Broker Profile Homepage is the starting point for managing broker profiles.

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

Creating a Broker Profile

You can create a broker profile by clicking the New button in the Recently Modified Broker Profile section. For more information, see [Creating Records](#) (on page 38) and [Broker Profile Fields](#) (on page 582).

Working with Broker Profiles Lists

The Broker Profiles Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for broker profiles.

Broker Profile List	Description
All Broker Profiles	Displays all records to which you have visibility, regardless of who owns the list. It does not filter broker profiles.
Recently Modified Broker Profiles	Filters all broker profiles, sorted by the modified date.
All National Broker Profiles	Filters all broker profiles where Sub Channel is set to National.
My Broker Profiles	Filters broker profiles with your name in the Owner field.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, therefore you cannot edit or delete them.

Viewing My Recently Modified Broker Profiles Section

The My Recently Modified Broker Profiles section shows the broker profile requests that you own and were recently modified. To expand the list, click Show Full List.

Adding Sections to Your Broker Profiles Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Broker Profiles Homepage:

- Broker Profiles Lists

- My Recently Modified Broker Profiles
- My Broker Profiles
- All National Broker Profiles.

To add sections to the Broker Profiles Homepage

- 1 On the Broker Profiles Homepage, click Edit Layout.
- 2 On the Broker Profiles Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page. Then click Save.

Managing Broker Profiles

For additional procedures that are common to all records, see [Working with Records](#) (on page 38).

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Broker Profile Fields

Use the Broker Profile Edit page to add a broker profile or update details for an existing broker profile. The Broker Profile Edit page shows the complete set of fields for a broker profile.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information, described in this table.

The following table provides additional information regarding some fields.

Field	Description
Demographic Information	
Broker Profile Name	The name of the broker profile. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on.
Partner	The name of the broker who has this profile.
Sub Channel	The description of the broker coverage. The options include: Globals, Locals, Nationals, Regionals, and Wholesalers.
Segmentation	The description of the broker segmentation. The options include: Commercial, Growth, and Retail.
Broker Profile Year	The year during which a broker profile is valid.
Phone Number	The phone number of the broker.
Fax Number	The fax number for the broker.
Website	The URL address for the broker.
Country	The country in which the broker is based.
Address 1	The address of the broker location.
Address 2	The address of the broker location.
City	The city in which the broker is based.
Province	The state (in jurisdictions such as the United States that use states) or province (in jurisdictions such as Canada that use provinces) where the broker is located, for example, <i>CA</i> for California, or <i>ON</i> for Ontario.
Post Code	The ZIP code (in the United States) or the postal code (in other jurisdictions) of the location of the broker.
Miscellaneous	
Company Overview	Overview of the broker.
Company Historic and Future Growth	The description of the broker history and future growth.

Insurance

Field	Description
Territory/Regional Structure	The description of the broker territory and regional structure.

11 Automotive

Oracle CRM On Demand provides the following record types that provide automotive information:

- **Vehicles.** Use these pages to track the sales history and service history of vehicles.
- **Dealers.** Use these pages to manage dealer information.

Note: These record types are available only with Oracle CRM On Demand Automotive Edition.

Dealers

Use the Dealers home pages to create, update, and track dealer records.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking dealer information, the Dealer tab might be excluded from your setup.

Working with the Dealer Homepage

The Dealer Homepage is the starting point for managing dealers.

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

Creating a Dealer

You can create a dealer by clicking the New button in the My Recently Viewed Dealers section. For more information, see [Creating Records](#) (on page 38) and [Dealer Fields](#) (on page 587).

Working with Dealer Lists

The Dealer Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for dealers.

Dealer List	Filters
All Dealers	All dealers to which you have visibility regardless of who

Dealer List	Filters
	owns the dealer.
My Dealers	Dealers with your name in the Owner field.
Recently Modified Dealers	All dealers with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Dealers

The My Recently Viewed Dealers section shows the dealers that you viewed most recently.

To expand the list, click Show Full List.

Viewing Dealer-Related Opportunities

The Dealer-Related Opportunities section shows the top opportunities that are assigned to you.

To expand the list of dealer-related opportunities, click Show Full List.

Adding Sections to Your Dealer Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Dealer Homepage:

- Recently Created Dealers
- Recently Modified Dealers
- My Recently Created Dealers
- My Recently Modified Dealers
- One or more report sections (your company administrator can make report sections available for display on your Dealer Homepage)

To add sections to your Dealer Homepage

- 1 On the Dealer Homepage, click Edit Layout.
- 2 On the Dealer Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

Related Information

See the following topics for related dealer information:

- [Dealer Fields](#) (on page 587)
- [Managing Dealers](#) (on page 587)

Managing Dealers

To manage dealers, do the following tasks:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Transferring Ownership of Records](#) (on page 83)
- [Adding Notes](#) (on page 87)
- [Attaching Files and URLs to Records](#) (on page 94)
- [Deleting and Restoring Records](#) (on page 100)
- [Managing Calendars and Activities](#) (on page 119)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related dealer information:

- [Dealers](#) (on page 585)
- [Dealer Fields](#) (on page 587)
- [Working with the Dealer Homepage](#) (on page 585)
- [Reports](#) (on page 675)

Dealer Fields

Use the Dealer Edit page to add a dealer or update details for an existing dealer. The Dealer Edit page shows the complete set of fields for a dealer.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Dealer Information	
Name	Name of the automobile dealer. Limit of 100 characters.
Phone number	The dealer's phone number.
Dealer Type	The dealer type, for example, Truck Dealer. Limit of 20 characters.
Site	The dealer's Web site. Limit of 50 characters.
Billing Address 1, 2, 3	The dealer's billing address.
Billing City	None.
Billing Country	The country specified in the dealer's billing address. The default valid values are the names of all the countries in the world. The valid value for the U.S. is <i>USA</i> . Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data. For more information, see About Countries and Address Mapping (on page 1286).
Billing PO Box/Sorting Code	If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township. For more information, see About Countries and Address Mapping (on page 1286).
Billing Province	If your file contains non-U.S. addresses, then map the following address items or their equivalents for the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast. For more information, see About Countries and Address Mapping (on page 1286).
Billing US State	The default valid values are standard two-letter abbreviations for all the U.S. states, which take all capital letters. Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data.
Billing Zip/Post Code	None.
Shipping Address 1, 2, 3	The dealer's shipping address. For information on how to map address fields on a country-by-country basis, see About Countries and Address Mapping . (see " About Countries and Address Mapping " on page 1286)
Shipping City	None.

Field	Description
Shipping Country	The default valid values are the names of all the countries in the world. The valid value for the U.S. is <i>USA</i> . Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data. For more information, see About Countries and Address Mapping (on page 1286).
Shipping PO Box/Sorting Code	If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township. For more information, see About Countries and Address Mapping (on page 1286).
Shipping Province	If your file contains non-U.S. addresses, then map the following address items or their equivalents for the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast. For more information, see About Countries and Address Mapping (on page 1286).
Shipping US State	The default valid values are standard two-letter abbreviations for all the U.S. states, which take all capital letters. Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data.
Shipping Zip/Post Code	None.
E-mail	The dealer's contact email address. Limit of 50 characters.
Additional Information	
Status	The status of the dealer, for example, Active.
Parent Dealer	The parent dealer of the current dealer record.
Currency	The currency of issue.
Ranking	The ranking of a dealer relative to other dealers, typically for sales or service purposes. Limit of 22 characters.
Owner	Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects which records are included in reports you or your managers run.
URL	The dealer's Universal Resource Locator (URL). Limit of 100 characters.
Parent Site	Parent dealer's Web site. Limit of 50 characters.
Stage	The phase of the application and contracting process for the dealer. Default values are: Active, Application Pending, Candidate, and Contract Pending.

Custom Fields

NOTE: Company administrators, whose role includes the Customize Application privilege, typically create custom fields.

Any custom field that is created in an Account record appears as the same custom field in the Dealer record, because a Dealer record inherits a custom field in an Account record. However, any custom field that is created in a Dealer record does not automatically appear in the Account record.

If you want to see the same custom field in both the Account view and the Dealer view, your company administrator can create the custom field in the Account record, and make it visible to both the Account view and the Dealer view.

If you do not want to see the same custom field in both the Account view and the Dealer view, your company administrator can create the Account-specific custom field in the Account record, and make the custom field visible only in the Account view.

For more information on custom fields, see [About Custom Fields](#) (on page 1039).

Related Information

See the following topics for related Dealer information:

- [Dealers](#) (on page 585)
- [Working with the Dealer Homepage](#) (on page 585)
- [Managing Dealers](#) (on page 587)

Vehicles

Use the Vehicles pages to create, update, and track vehicles.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking vehicle information, the Vehicles tab may be excluded from your setup.

Working with the Vehicle Homepage

The Vehicle Homepage is the starting point for managing vehicles.

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

Creating a Vehicle

You can create a vehicle by clicking the New button in the My Recently Viewed Vehicles section. For more information, see [Creating Records](#) (on page 38) and [Vehicle Fields](#) (on page 598).

Working with Vehicle Lists

The Vehicle Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists, based on different criteria. These custom lists appear above the standard set of lists.

The following table describes the standard lists for vehicles.

Vehicle List	Filters
All Vehicles	All vehicles, sorted by the vehicle identification number (VIN)
All Recently Modified Vehicles	All vehicles, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see [Creating and Refining Lists](#) (on page 73).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Vehicles

The My Recently Modified Vehicles section shows the vehicles that you viewed most recently.

Viewing Vehicle-Related Service Requests

The Vehicle-Related Service Request section shows this information:

- **Service Number.** The service requests assigned to you. Click SR Number to review the service request.
- **Subject.** The title of the service request.
- **Asset.** The asset corresponding to the service request.
- **Show Full List.** Expands the list of vehicle-related service requests.

To expand the list, click Show Full List.

Adding Sections to Your Vehicle Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Vehicle Homepage:

- Recently Created Vehicles
- Recently Modified Vehicles
- My Recently Created Vehicles
- My Recently Modified Vehicles
- One or more report sections (Your company administrator can make report sections available for display on your Vehicle Homepage.)

Complete the following task to add sections to the Vehicle Homepage.

To add sections to your Vehicle Homepage

- 1** On the Vehicle Homepage, click Edit Layout.
- 2** On the Vehicle Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
- 3** Click Save.

Related Information

See the following topics for related Vehicle information:

- [Vehicle Fields](#) (on page 598)
- [Managing Vehicles](#) (on page 592)

Managing Vehicles

The following topics describe optional configuration that can be performed by your company administrator when managing vehicles in Oracle CRM On Demand:

- [Enabling a Vehicle Product Type](#) (on page 594)
- [Enabling Vehicle Association on Service Requests](#) (on page 593)

Click a topic to see step-by-step procedures to do the following:

- [Updating Vehicle Ownership](#) (on page 596)
- [Tracking Service requests for Vehicles](#) (on page 595)
- [Tracking Sales Histories of Vehicles](#) (on page 596)
- [Tracking Service Histories of Vehicles](#) (on page 597)
- [Tracking Financial Information for Vehicles](#) (on page 598)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

- [Creating Records](#) (on page 38)
- [Updating Record Details](#) (on page 60)
- [Linking Records to Your Selected Record](#) (on page 61)
- [Working with Lists](#) (on page 69)
- [Working with Records](#) (on page 38)
- [Adding Notes](#) (on page 87)

- [Transferring Ownership of Records](#) (on page 83)
- [Tracking Assets](#) (on page 188) (includes linking vehicles to accounts)
- [Attaching Files and URLs to Records](#) (on page 94)
- [Deleting and Restoring Records](#) (on page 100)
- [Tracking Assets](#) (on page 188) (includes linking vehicles to accounts)
- [Renaming Record Types](#) (on page 1097)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Vehicle information:

- [Vehicles](#) (on page 590)
- [Vehicle Fields](#) (on page 598)
- [Working With the Vehicle Homepage](#) (on page 590)
- [Reports](#) (on page 675)

Enabling Vehicle Association on Service Requests

The default service request layout does not display vehicle association. However, your company administrator can configure a custom service request page layout by completing the following procedure.

To display vehicle association on a service requests record

- 1 From any page, click Admin, click Application Customization, click Service Requests, and click Service Request Page Layout.
- 2 In the Page Layout list, do one of the following:
 - Click the Edit link for an existing layout to modify it.
 - Click the New Layout button to create a new layout.
 - Click the Copy link to copy an existing layout.

The Page Layout Wizard is displayed.

NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link that you click.

- 3** In Step 1 Layout Name, enter a name for the layout and a description (optional).
- 4** In Step 2 Field Setup, select the field characteristics as necessary.
- 5** In Step 3 Field Layout, make sure that the Vehicle field is available on the Service Request Page Layout.
- 6** Click Finish to exit the Wizard.
You now must assign the new custom layout to a user role, using the Role Management Wizard.
- 7** Click Admin, click User Management and Access Controls, then click Role Management:
- 8** Find the role to which you want to assign the custom service request page layout, and click Edit.
- 9** In Step 6 of the wizard, change the Page Layout Name to the custom service request page layout for the service request record.
- 10** Click Finish to exit the wizard.

NOTE: By enabling Vehicle association, you can also update the Vehicle Search page layout to alter the association selection that a user sees. For more information, see [Managing Search Layouts](#) (on page 1064).

Enabling a Vehicle Product Type

Normally, to add products, your company administrator uses the Content Management portion of the Admin tool. For Vehicles, the administrator can update the product record with the Product Type field set to Vehicle. Note that the Product Type for Vehicle records is not displayed in the product default layout. To enable the Product Type for a vehicle, your company administrator can create a custom product page layout by completing the steps in the following procedure.

To display the product type for a vehicle record

- 1** From any page, click Admin, click Application Customization, click Product, click Product Page Layout, and copy the Product Page Standard Layout to a new layout.
- 2** Complete the Page Layout Wizard for the Product:
 - a** In Step 1, provide a name for your layout.
 - b** In Step 2, check the Required box for the Product Type.
 - c** In Step 3, make sure that the Product Type field is listed in the Key Product Information section on the right.
 - d** Click Finish to exit the wizard.
- 3** Assign the new custom layout to a user role as required using the Role Management Wizard.

- a** Click Admin, click User Management and Access Controls, then click Role Management:
- b** Find the role that you want to assign to the custom product page layout and click Edit.
- c** In Step 6 of the wizard, change the Page Layout Name to the custom product page layout for the Product record.
- d** Click Finish to exit the wizard.

The user whose role has been modified can create a product record with the Product Type field by using the Content Management functionality. For more information on adding products, see [Setting Up Company Products](#) (on page 1470).

For more information, see [Setting Up Company Products](#) (on page 1470).

Tracking Service Requests for Vehicles

When you want to review, update, or create a service request for a vehicle, update the vehicle record or create the service request for the associated vehicle.

To track the service request for a vehicle

- 1** Select the vehicle that you want to track.

For more information on selecting vehicles, see [Finding Records](#) (on page 41).

- 2** On the Vehicle Detail page, scroll down and click New in the Service Request title bar.

NOTE: When creating a service request, selecting a dealer allows the user to change from all contacts search to contracts for the related dealer. You can change the filter to run a query as you require.

- 3** On the Service Request Edit page, fill in the information.

The following table describes some field information for service histories.

Field	Comments
Service Number	Oracle CRM On Demand generates this number.
Subject	The title or short description of this activity.
Priority	The priority of the service request, such as 1-ASAP, 2-High, or 3-Medium.
Status	The status of the service request, such as Opened, Pending, or Closed.
Opened Time	Indicates the time when the service request was opened. Oracle CRM On Demand generates this number.
Contact	The contact related to the service request.
Dealer	The dealer related to the service request.

Field	Comments
Owner	The owner of the service request.

NOTE: When creating a service request, selecting a dealer changes all contacts to only those contacts who are associated with the dealer by default. The filter can be changed to query all contacts.

Updating Vehicle Ownership

When a vehicle is sold, update the vehicle record to track the vehicle ownership.

- 1 Select the vehicle.
For instructions on selecting vehicles, see [Finding Records](#) (on page 41).
- 2 On the Vehicle Detail page, click Edit in the title bar.
For information on the fields in the Vehicle Details page, see [Vehicle Fields](#) (on page 598).
- 3 On the Vehicle Edit page, update the Owned By field in the Vehicle record.
- 4 Save the record:
 - To save this record and then open the Vehicle Detail page (where you can link information to this record), click Save.
 - To save this record and then open the Edit page (where you can create another vehicle record), click Save & New Vehicle.

Tracking Sales Histories of Vehicles

When you want to review, update, or create a sales history for a vehicle, update the vehicle record.

To track the vehicle's sales history

- 1 Select the vehicle.
For instructions on selecting vehicles, see [Finding Records](#) (on page 41).
- 2 On the Vehicle Detail page, scroll down to the Sales History section, and click Add in the title bar.
NOTE: If the Sales History section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper right corner of the page, and add the Sales History section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- 3 On the Sales History Edit page, fill in the information.
The following table describes some field information for sales histories.

Field	Comments
-------	----------

Field	Comments
Sales Number	System-generated number.
Currency Code	Defaults to your currency.
Owner First Name	When you select the last name, this field is filled in.
Owner Last Name	Owner of the vehicle.

- 4 Save the record.

Tracking Service Histories of Vehicles

When you want to review, update, or create a service history for a vehicle, update the vehicle record. The service history can include service requests and other services related to the vehicle.

To track the vehicle's service history

- 1 Select the vehicle.

For instructions on selecting vehicles, see [Finding Records](#) (on page 41).

- 2 On the Vehicle Detail page, scroll down and click Add in the Service History title bar.

NOTE: If the Service History section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Service History section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- 3 On the Service History Edit page, fill in the information.

The following table describes some field information for service histories.

Field	Comments
SH #	Service History number which has a limit of 30 characters. Oracle CRM On Demand generates this number.
SR #	Service request record linked to this service history. Limit of 64 characters.
Owner Last Name	Owner of the vehicle. Limit of 50 characters.
Service Date	Default is today's date.
Currency Code	Defaults to your currency. Limit of 20 characters.
Service Name	A name or number linked with the service history record. Limit of 100 characters.
Make	The manufacturer or brand name of the vehicle. Read-only.

Field	Comments
Owner First Name	When you select the last name, this field is filled in. Limit of 50 characters.
Service Provider	Dealer or other service provider who serviced the vehicle. Limit of 100 characters.
Description	This field has a limit of 16,350 characters.

- 4 Save the record.

Tracking Financial Information for Vehicles

You can track the financial information for a vehicle.

To track the financial information for a vehicle

- 1 Select the vehicle.

For instructions on selecting vehicles, see [Finding Records](#) (on page 41).

- 2 On the Vehicle Detail page, scroll down and click Add in the Financial Information title bar.

NOTE: If the Financial Information section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper right corner of the page, and add the Financial Information section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- 3 On the Financial Information Edit page, fill in the information.

The following table describes some field information for financial information.

Field	Comments
Financial Detail #	System-generated number. Limit of 15 characters.
Finance Provider	Limit of 30 characters.

Vehicle Fields

Use the Vehicle Edit page to add a vehicle or update details for an existing vehicle. The Vehicle Edit page shows the complete set of fields for a vehicle.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Vehicle Information	
VIN	Vehicle identification number (VIN). Limit of 100 characters.
Make	The manufacturer or brand name of the vehicle. Default values include: Metro Motors, Toyota, and Unknown Make.
Model	Model of the vehicle. Default values are: 4Runner and Tacoma.
Year	The year that the vehicle was manufactured. This is a numerical picklist and does not accept non-numerical characters.
Product Name	<p>The name of the product.</p> <p>Typically, to add products, your company administrator uses Content Management functionality. For Vehicles, the company administrator can update the product record with the Product Type field set to Vehicle. Note that the Product Type is not exposed in the product default layout.</p> <p>The procedure to expose Product Type for vehicles is described in Exposing a Vehicle Product Type (see "Enabling a Vehicle Product Type" on page 594).</p>
Trim	The trim for the vehicle. Default values are: 2WD and Prerunner.
Door	The number of doors for the vehicle. The default values are: 2 Door, 3 Door, and 4 Door.
Exterior Color	The color of the vehicle.
Vehicle Currency	The currency designation for the vehicle price, for example, U.S. dollars (USD).
Additional Vehicle Information	
Used/New	Whether the vehicle is new or used.
Product Type	<p>The type of vehicle. Limit of 30 characters.</p> <p>NOTE: This field is read-only.</p>
Interior Color	Color of the vehicle's interior, for example, Red.
Transmission	The vehicle's transmission type. The default values are: Auto, Manual, and Option.
Engine	The vehicle's engine type. The default values are: 4 Cylinder, 6 Cylinder, 8 Cylinder, 10 Cylinder, and Option.
Body	The vehicle's body type, for example, Coupe or Cabriolet.
Owned By	The vehicle ownership type, for example, Business or Company Car.
Contact	<p>The contact person for the vehicle. Limit of 100 characters.</p> <p>NOTE: This field is read-only.</p>

Field	Description
Account	The account linked with the vehicle.
Account Site	The location of the account. Limit of 50 characters. NOTE: This field is read-only.
Selling Dealer	Name of the dealer selling the vehicle. Limit of 100 characters.
Servicing Dealer	Name of the dealer servicing the vehicle. Limit of 100 characters.
MSRP	The manufacturer's suggested retail price (MSRP) in the currency used in the Vehicle record. Limit of 22 characters.
Dealer Invoice Price	The dealer's invoice price in the currency used in the Vehicle record. Limit of 22 characters.
Status	The current status of the vehicle, for example, Production.
Location	The location of the vehicle, for example, Dealer Lot.
Current Mileage	The current number of miles that appears on the vehicle's odometer. Limit of 22 characters (number).
Warranty Type	The type of warranty that is provided with the vehicle, for example, Full or Extended.
License Number	The owner's license number. Limit of 30 characters.
License State	The state for which the license is issued.
Description	Limit of 250 characters.

Note: To configure any of the picklist fields, for example Model, Trim, Door, your company administrator can customize the application for the picklist values as described in [Changing Picklist Values](#) (on page 1054).

Custom Fields

NOTE: Company administrators, whose role includes the Customize Application privilege, typically create custom fields.

Any custom field that is created in an Asset record appears as the same custom field in the Vehicle record. A Vehicle record inherits a custom field in an Asset record. However, any custom field created in a Vehicle record does not automatically appear in the Asset record.

If you want to see the same custom field in both the Asset view and the Vehicle view, your company administrator can create the custom field in the Asset record, and make it visible to both the Asset view and the Vehicle view.

If you do not want to see the same custom field in both the Asset view and the Vehicle record, your company administrator can create the Asset specific custom field for the Asset, and make the custom field visible only in the Asset view.

For more information on custom fields, see [About Custom Fields](#) (on page 1039).

Additional Fields

Several fields do not appear on the Vehicle Detail page by default: Part #, Purchase Date, Purchase Price, Quantity, Ship Date, Install Date, Expiration Date, Notify Date, Product Category, and Contract.

Your company administrator can change the definitions of these fields as required. For more information on changing field definitions, see [Creating and Editing Fields](#) (on page 1043). To make the fields visible, your company administrator must include these fields in the page layout. For more information on making these fields visible on a page, see [Customizing Static Page Layouts](#) (on page 1057).

Related Information

See the following topics for related Vehicle information:

- [Working With the Vehicle Homepage](#) (on page 590)
- [Managing Vehicles](#) (on page 592)

12 Personalizing Your Application

You can use the My Setup pages to personalize Oracle CRM On Demand. For step-by-step instructions, click one of these topics:

- [Updating Your Personal Details](#) (on page 604)
- [Setting Your Default Search Record Type](#) (on page 612)
- [Setting Your Theme](#) (on page 612)
- [Setting Your Record Preview Mode](#) (on page 613)
- [Changing Your Language Setting](#) (on page 614)
- [Viewing Audit Trail Fields](#) (on page 614)
- [Managing Your Quota](#) (on page 615)
- [Reviewing Your Sign In Activity](#) (on page 615)
- [Changing Your Password](#) (on page 616)
- [Setting Up Your Security Questions](#) (on page 616)
- [Adding Delegated Users](#) (on page 617)
- [Reviewing Your PIM Sync Client Activity](#) (on page 618)
- [Granting Sign In Access to Technical Support](#) (on page 618)
- [Displaying Your Tabs](#) (on page 619)
- [Changing Your Detail Page Layout](#) (on page 619)
- [Changing Your Homepage Layouts](#) (on page 620)
- [Changing Your Action Bar Layout](#) (on page 621)
- [Setting Up Your Calendar](#) (on page 622)
- [Accessing the Data and Integration Tools](#) (on page 622)
- [Embedding a Favorite Lists Widget](#) (on page 624)
- [Embedding a Message Center Widget](#) (on page 625)
- [Embedding a Reports Widget](#) (on page 625)
- [Embedding a Simple List Widget](#) (on page 626)

Related Topics

See the following topics for related information about personalizing your application:

- [About On Demand Widgets](#) (on page 623)
- [Importing Your Contacts](#) (on page 198)
- [Using the Offline Client](#) (on page 628)
- [Synchronizing with PIMs](#) (on page 637)
- [Adding Emails from Microsoft Outlook and Lotus Notes](#) (on page 654)

Updating Your Personal Details

You can update your personal details, such as your address and phone number. Your company administrator controls the layout and information that you see on your Personal Detail page, consequently there might be differences between the following descriptions and what you see.

NOTE: Changes made to your Default Language, Currency, Time Zone, and Country on the Personal Profile pages are not reflected in all reports and analyses until you sign out and sign in again.

To update your personal details

- 1 In the upper right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 In the Personal Detail section, click Edit.
- 5 In the Personal Edit form, update the information, then save the record.

Note: You must sign out and in again to activate some of the changes (Language, Locale, Time Zone, and Currency).

The following table describes some fields you can review or update.

Field	Description
Key User Information	
First Name	The first name of the user. Limit of 50 characters. This is a required field.
Last Name	The last name of the user. Limit of 50 characters. This is a required field.
Middle Name	The middle name of the user. Limit of 50 characters.
Mr./Ms.	The salutation of the user.

Field	Description
Status	This read-only field indicates the status of the user. Only active users can access Oracle CRM On Demand.
Reports To	This read-only field indicates the manager of the user. NOTE: Depending on how your company administrator sets up the user page layouts for your company, you might see the Reports To (Alias) field instead of the Reports To field. The Reports To (Alias) field shows the short identifier for the manager of the user.
Job Title	This read-only field shows the job title of the user
Region	The region or area where the user is located. Limit of 40 characters.
Subregion	A further refinement of the region or area where the user is located. Limit of 40 characters.
Role	This read-only field indicates the role assigned to the user in Oracle CRM On Demand. User roles define the features in Oracle CRM On Demand that a user has the privileges to use, the set of permissions the user is given to work with protected information, and the user interface settings that display information.
Primary Group	The group to which this user has been added. Read-only.
User Detail Information	
Alias	A short identifier for the user that is used to assign or show ownership on specific record types. For example, enter the user's preferred name or nickname. This is a required field and is set up by the company administrator.
User ID	A unique system identifier for a user used in conjunction with Company Sign In ID to sign in to the application. This is a required field, which the company administrator sets up.
Email	The complete email address for a user, such as isample@rightequip.com. The email address is used for system notifications such as a reset password notification. This is a required field, which the company administrator sets up.
Secondary Email	The secondary email address for the user.
Work Phone #	The user's work telephone number. This is a required field.
Cellular Phone #	The user's cellular phone number.
Company Sign In ID	The company to which the user belongs. This is a default field and is set up at the time the company is created.
User Sign In ID	The ID with which the user signs in to the application. The ID is a combination of the Company Sign In ID and the User ID, separated by a forward slash. The User Sign in ID is a required field and is set up by

Field	Description
	the company administrator.
Contact Preferences	
Never Call	Select this check box if you do not want to receive calls from Oracle CRM On Demand Marketing.
Never Mail	Select this check box if you do not want to receive mail from Oracle CRM On Demand Marketing.
Never Email	Select this check box if you do not want to receive email messages from Oracle CRM On Demand Marketing.
Always Send Critical Alerts	<p>If this check box is selected, you receive email messages containing important information from Oracle CRM On Demand. These messages include:</p> <ul style="list-style-type: none"> ■ Critical information about product updates and service changes for Oracle CRM On Demand and related products ■ Instructions and schedules for upgrades to major new releases ■ High priority or emergency communications to supplement normal support processes (for example, in the case of a hardware failure) <p>This field cannot be updated on your Personal Details page. Only company administrators have the ability to update this check box for users, from the User Details page.</p> <p>NOTE: This check box is not used to determine which users receive the system alerts issued by Oracle CRM On Demand Customer Care, such as reminders for upcoming scheduled maintenance.</p>
User Geographic Information	
Language, Locale, Currency, Time Zone	<p>Your company administrator sets up the default settings for these items. You can override the defaults by clicking the picklist for each item, and selecting the value that you want.</p> <p>For more information on these fields, see About Profile Settings for Users (on page 610).</p> <p>You must sign out and sign in again to activate any change to your language, locale, currency, or time zone.</p>
User Security Information	

Field	Description
Reporting Subject Areas	<p>Use this picklist to set your visibility to real-time report records in Oracle CRM On Demand Answers. These reports provide real-time analyses of data. You can select one of the following values:</p> <p>Manager Visibility - Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows you to see your own data, plus data shared with you by the Account and Opportunity Team.</p> <p>If you do not define the Reporting Subject Areas setting, the company-wide setting that is set up by your company administrator applies. For more information on reports, see Reports (on page 675), particularly the About Visibility to Records topic.</p>
Historical Subject Areas	<p>Use this picklist to set your visibility to records for the Analytics subject areas in Oracle CRM On Demand Answers. Analytics reports have to do with historical or trend analysis, or contain more complex calculations than those found in real-time reports. You can select one of the following values:</p> <p>Manager Visibility - Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows you to see your own data, plus data shared with you by the Account and Opportunity Team.</p> <p>Full Visibility - This setting combines Manager Visibility, Team Visibility, and books.</p> <p>If you do not define the Historical Subject Areas setting, the company-wide setting that is set up by your company administrator applies. For more information on reports, see Reports (on page 675), particularly the About Visibility to Records topic.</p>
Role-Based Can Read All Records	<p>Use this picklist if you want Oracle CRM On Demand Answers reporting to use the Can Read All Records setting on record-type basis, as defined on the Record Type Access page within the Role management wizard. For example, if the Can Read All Records visibility setting is selected by your company administrator for your user role on a given record type, (by clicking Admin, User Management and Access Controls, Role Management, then editing a role and clicking Record Type Access), you can view all records of that record type in Oracle CRM On Demand Answers, provided the Role-Based Can Read All Records setting is enabled either through the Company Profile or your User Profile.</p> <p>See About the Role-Based Can Read All Records Setting (on page 611) for guidance on when and how to enable the Role-Base Can Read all Records.</p> <p>If you do not select Role-Based Can Read All Records, then Oracle CRM On Demand Answers reporting uses the visibility set on Reporting Subject Areas and Historical Subject Areas fields.</p>

Field	Description
External Identifier for Single Sign On	Read-only. For more information, see Setting Up Your Company Profile and Global Defaults (on page 996).
Last Sign In	A system-generated field. For information on reviewing all your sign-in attempts, see Reviewing Your Sign In Activity (on page 615).
Communications Settings	
Display Click-to-Dial Popup	This check box is for users who are set up with Oracle Contact On Demand. Oracle Contact On Demand renders phone numbers as links that you can click on the List and Detail pages. If you select the Display Click-to-Dial Popup check box, and then click a phone number link, you are prompted with a Click-To-Dial window before the Oracle Contact On Demand places the call. For more information about placing internal or external calls, see Placing Calls (on page 298).
Display Communication Homepage Inbox for	Select a value from the menu to determine the period during which the Communication Homepage inbox displays activities, for example, Last Month, Last Day, and so on. Oracle CRM On Demand filters these activities. The filter is based on the activity start time. The shorter the period the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all communications. You must log out and log in again for this change to take effect.
Display Communication Homepage recently completed activities for	Select a value from the menu to determine the period during which the Communication Homepage displays the recently completed activities, for example, Last Month, Last Day, and so on. Oracle CRM On Demand filters these activities. The filter is based on the activity end time. The shorter the period, the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all activities. You must log out and log in again for this change to take effect.
Additional Information	
Theme Name	This picklist allows you to select the available application-wide themes for your application. A theme changes the look and feel of the application, including its background color, hyperlinks, and icons. Several predefined themes are available. However, your company administrator can create custom themes in Oracle CRM On Demand. A blank value indicates that you have to use the theme that your company administrator has set in the company profile. For more information on creating custom themes, see Creating New Themes (on page 1093).
Default Search Record Type	This picklist allows you to change the default search record type to display in the Action bar search. (For example, change Contact to Account or another record type that you can access.) The action bar search box defaults to this record type every time you sign in to the application regardless of where you left it the last time you were

Field	Description
	signed into the application.
Show Welcome Page on Sign In	This check box allows you to specify whether the Oracle CRM On Demand Welcome Page is displayed when you sign in to the application.
Enable Sync of Team Contacts	Determines if you want Oracle PIM Sync On Demand to include the synchronizing of contacts that the user owns, as well as all the contacts that the user has access to using Contact Teams. Selecting this option prevents duplicate records from being created, because each team member is synchronizing with the same contact record in Oracle CRM On Demand. For more information about sharing records, see Sharing Records (Teams) (on page 84). For more information about Oracle PIM Sync On Demand, see Synchronizing with PIMs (on page 637).
Record Preview Mode	<p>This picklist allows you to enable the record preview functionality and to specify how the preview window opens. Depending on the setting you select, the preview window opens when you hover your pointer over a link to a record, or when you click on a preview icon that appears when you hover your pointer over a link to a record. The preview window shows the first section of the Detail page of the record. You also have the option of disabling the record preview functionality by selecting Off in this field.</p> <p>The record preview setting can be specified at company level by your company administrator, and by each user. Your personal setting overrides the default setting for the company. If this field is blank, the default record preview setting for the company is used.</p>
Head-up Display	<p>If the head-up display functionality is enabled, links to the related information sections of the page (such as linked records sections) are available in the head-up display at the bottom of your browser window. You can click the links to go to the related information sections without having to scroll down the page. You can collapse the head-up display by clicking the minus icon (-) in the display; to expand the display again, click the plus icon (+). Your expand or collapse setting in the head-up display is maintained for all record types until you change it again, even if you sign out of the application and sign in again.</p> <p>You can also remove the head-up display completely from your Detail pages, by turning off the functionality in your personal profile.</p> <p>NOTE: The head-up display functionality can be turned on or off at company level, and by each individual user. Your personal setting overrides the company setting. The colors in the head-up display are determined by the theme you are using. For more information about choosing a theme, see Setting Your Theme (on page 612).</p>

About Profile Settings for Users

Each company has at least one designated company administrator who sets up and customizes Oracle CRM On Demand for the entire organization. Company administrators set up some defaults that every user inherits initially, but each user can override these initial default settings. The following table describes what the settings affect.

Setting Name	Description
Time Zone	The application supports Universal Time Code (UTC) so that all times and dates are shown according to the user's time zone. For example, an appointment scheduled for 11:00 a.m. PST displays as 2:00 p.m. for a user whose setting is EST, because of the three-hour time difference.
Locale	The Locale setting determines the formatting for numbers, currencies, phone numbers, times, and dates. For example, users who select the German - Germany locale setting see currency amounts that display 110.000,00, whereas users who select the English - United States setting see the same amount as 110,000.00. Users should select the format they are most comfortable with.
Language	The Language setting allows users to change the language for the user interface, online help, and tutorials. Depending on the company's default language, users may see certain items in reports in a language other than their default.
Currency	<p>The Currency setting provides the default currency amount linked with all new records the user creates. When a user views revenue reports, they display in the user's default currency. If a manager sees cumulative revenue from users with different currencies, she sees the amount in her default currency (company administrators must set up exchange rates for this to occur).</p> <p>However, forecasts are always rolled up to the company's default currency. For example, a user with U.S. dollars as his default currency sees his forecast converted to euros, if his company's currency is euros.</p>
Country	The Country setting on the user profile controls the template that is used to display the default country-specific address fields when the user creates a new record with an address. For example, if the Country field on the user's profile is set to France, then when the user creates a record with an address, such as an account record, the French template is used to display address fields that are specific to France for both the shipping and billing addresses when the new record page first opens. Oracle CRM On Demand has address templates specific to over 60 countries.

Setting Name	Description
Phone	<p>The Phone formatting is determined by the Locale setting. The application adjusts for out-of-the-area phone numbers so that users see the entire sequence they need to dial. For example, a user in the U.S. is required to dial 011 when dialing internationally. Therefore, when a user enters +44 3333 333 333 for the United Kingdom, the number displays as 011 +44 3333 333 333.</p> <p>NOTE: Users should enter the prefix plus sign (+) before international numbers.</p> <p>Phone fields have a phone icon next to them. Clicking on the icon opens a phone verification window, which allows users to verify if the application has correctly identified the number: country code, city/area code, local number, and any extension for the number. Closing that window prompts the application to enter the correct dialing sequence.</p> <p>Additionally, if users want to determine the country code for a country, they can click the phone icon, select the country, and save the information. The country code for the country displays in the Phone field.</p>

NOTE: When these settings are changed, the user must sign out and sign in again for Oracle CRM On Demand to display data with the new settings.

About the Role-Based Can Read All Records Setting

Your company administrator sets up the Role-Based Can Read All Records check box in the Company Profile page, but a user can override this setting in the user's User Profile page. Depending on how the Role-Based Can Read All Records check box is set up, Oracle CRM On Demand Answers reporting uses the visibility set on an object basis on the user's role definition, or the visibility set on the Reporting Subject Areas and Historical Subject Areas fields on the Company Profile and User Profile pages. For more information on company and user profiles, see [About Profile Settings for Companies and Users](#) (see "About Profile Settings for Users" on page 610).

The following table provides information on when and how to enable the Role-Based Can Read All Records setting.

Role-Based Can Read All Records Setting		Visibility of Role Record Type
Company Profile Setting	User Profile Setting	
Yes	Yes	Enabled
Yes	No	Disabled
Yes	NULL	Enabled (displays the company profile setting by default)
NULL	Yes	Enabled

Role-Based Can Read All Records Setting		Visibility of Role Record Type
NULL	NULL	Disabled (displays the company profile setting by default)
NULL	No	Disabled

To update your personal profile, see [Updating Your Personal Details](#) (on page 604).

To update the company profile (company administrators only), see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).

Setting Your Default Search Record Type

You can set your default search record type from your personal profile information. For example, you might want to modify your default search record type for your targeted searches from a Contact record to an Account record. For more information on using searches with Oracle CRM On Demand, see [Finding Records](#) (on page 41). To set your default search record type, complete the steps in the following procedure.

To set your default search record type

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 In the Personal Detail page, click Edit.
- 5 In the Personal Edit page, scroll down to the Additional Information section.
- 6 Select the record type that you want in the Default Search Record Type picklist.
- 7 Save the record.

Note: You must sign out and sign in again to Oracle CRM On Demand to see the changes.

Setting Your Theme

You can set your UI Theme from your personal profile information to one of the several predefined themes in Oracle CRM On Demand or to a custom theme already created by your company administrator. For more information on creating new themes, see [Creating New Themes](#) (on page 1093). A blank theme indicates that your company administrator has set a theme for your company. In this case, you must use the company theme.

To set your theme, complete the steps in the following procedure. When you specify a theme, it takes precedence over any other theme that is specified at the role or company level.

To set your theme

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link, and click Edit.
- 4 Scroll down to the Additional Information section.
- 5 Select the theme that you want in the Theme Name picklist.

Setting Your Record Preview Mode

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

- My Homepage
- Record Homepages
- Record List pages
- Record Detail pages (including lists of related records)
- Action bar

The preview window shows the first section of the Detail page of the record. You can set your record preview mode in your Personal Details page. Depending on the setting you select, the preview window opens when you rest your pointer on a link to a record, or when you click a preview icon that appears when you rest your pointer on a link to a record. You can also disable the record preview functionality.

Your company administrator can specify the record-preview setting at company level, and each user can also specify the record-preview setting in their Personal Details page. Your personal setting overrides the default setting for the company. If you do not change the record preview setting on your Personal Details page, the default record preview setting for the company is used.

To set your record preview mode, complete the steps in the following procedure.

To set your record preview mode

- 1 In the upper-right corner of any page, click My Setup.
- 2 In the Personal Profile section, click Personal Profile.
- 3 In the Personal Information section, click My Profile.
- 4 In the Personal Detail page, click Edit.
- 5 In the Personal Edit page, scroll down to the Additional Information section.
- 6 In the Record Preview Mode field, select the mode that you want from the picklist.

If you want to use the default record preview setting for the company, select the blank option from the picklist.

- 7 Save the record.

Changing Your Language Setting

The language setting in your personal details controls the language that you see in the user interface, online help, and tutorials. Your company administrator initially specifies your language, but you can change this setting in your personal details. Depending on the company's default language, you might see certain items in reports in a language other than the language you set as your default.

To change your language setting, complete the steps in the following procedure.

To change your language setting

- 1 In the upper-right corner of any page, click My Setup global link.
- 2 In the Personal Profile section, click Personal Profile.
- 3 In the Personal Information section, click My Profile.
- 4 In the Personal Detail page, click Edit.
- 5 In the Personal Edit page, scroll down to the User Geographic Information section.
- 6 Select the language that you want in the Language picklist.
- 7 Save the record.
- 8 Sign out of Oracle CRM On Demand, and sign back in again to activate the change.

Viewing Audit Trail Fields

To view the activity of software applications, such as Web services and Oracle PIM Sync On Demand, complete the steps in the following procedure.

To view audit trail fields

- 1 In the upper-right corner of any page, click the My Setup global link.
 - 2 In the Personal Profile section, click the Personal Profile link.
 - 3 In the Personal Information section, click the My Profile link.
 - 4 Scroll down to the Audit Trail section to review the fields that are enabled for audit.
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Managing Your Quota

Either you or your company administrator can set up your quotas. As an end user, you do not require any special privilege, however your company administrator requires the Manage Users and Access privilege to set up your quota.

You can review and modify existing quotas or enter new quotas and calculate them by:

- Entering a yearly quota, which the system spreads evenly over the year
- Entering a quota for each month, which the system totals for the year

You can make a quota active at any time. After you activate a quota, Oracle CRM On Demand uses the quota information to populate fields in the Forecasting pages. It saves your targets for each year, allowing you to review your target history, and compare your forecasts with your quotas. For additional information, see [Managing Quotas](#) (on page 235).

NOTE: You can have more than one active quota per year. Since only active quotas are used when creating your forecast, make sure that you activate all of the quotas that you want included in your forecast.

To define your quota

- 1 In the upper-right corner of any page, click the My Setup global link.
 - 2 In the Personal Profile section, click the Personal Profile link.
 - 3 In the Personal Information section, click the My Profile link.
 - 4 In the Personal Detail page, scroll to the Quotas section.
 - 5 In the Quotas section, click New Quota.
 - 6 In the Edit Quota form, enter the Quota Begins and Name for the quota.
 - 7 Do one of the following:
 - To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
 - To add the monthly quotas together, enter an amount for each month and click Sum.
- NOTE:** Clicking Sum adds all monthly quota entries and displays the total in the Total field.
- 8 Save the record.

Reviewing Your Sign In Activity

You can review all of your sign in activity, for example, the number of times you signed into the application.

To review sign in activity

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 In the Personal Detail page, scroll down to the Sign In History section to review your sign-in activity.
This activity includes your sign-in activity from other applications, including Oracle CRM On Demand Integration for Office, Oracle Outlook Email Integration On Demand, and so on.

Changing Your Password

Oracle CRM On Demand allows you to change your password at any time, provided that your role includes the Reset Personal Password privilege.

Note: If your company has implemented a solution where you must use Single Sign-On (SSO) to access Oracle CRM On Demand, you must reset your password using that solution, and not in Oracle CRM On Demand.

To change your password

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the Password Update link.
- 4 In the Password Update page, review the password policy before making any changes to your password.
Typically, the password policy is set by the company administrator and is subject to change.
- 5 In the Password Update section, fill in the fields.
- 6 Save the record.

Setting Up Your Security Questions

If you forget your password for Oracle CRM On Demand, your security questions are used. You set up your security questions when you sign in to Oracle CRM On Demand for the first time. However, you can change your security questions and answers at any time.

What Happens If You Forget Your Password?

If you forget your password for Oracle CRM On Demand, you can click the Can't Access Your Account? link on the Oracle CRM On Demand Sign-In page, and then click the I Forgot My Password link to reset your password. Oracle CRM On Demand then sends an email to you that contains a temporary link to the application. When you access the temporary link, you are required to answer your security questions for authentication. When you answer the questions correctly, then you can set up your password in Oracle CRM On Demand. For more information about resetting your password if you forget it, see [Retrieving Your User Sign-In ID or Resetting Your Password](#) (on page 112).

NOTE: If you forget your user sign-in ID, you can also use the Can't Access Your Account? link on the Oracle CRM On Demand Sign-In page to submit a request to have your user sign-in ID sent to you by email.

The following procedure describes how to set up your security questions.

To set up your security questions

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 On the Personal Profile page, click the My Security Questions link.
- 4 On the My Security Questions page, if you are not setting up your security questions for the first time, enter your password for Oracle CRM On Demand in the Current Password field.
- 5 Select the questions, and enter the answers.
NOTE: An answer cannot exceed 100 characters.
- 6 Save the record.

TIP: Take note of the security questions and answers that you set up, so that you have the information readily available if you forget your password.

Adding Delegated Users

You can allow a user to act as a delegate for you by adding that user to your delegated users list. Your delegated users gain owner access to the records owned by you. User delegation is a useful feature that allows users who support multiple people to see all of the records belonging to those people. Your company administrator typically enables this feature.

NOTE: Your company administrator can also appoint delegated users for you. For more information on how company administrators appoint delegated users, see [Adding Delegates for Users \(Administrator\)](#) (on page 1125).

To add delegated users

- 1 In the upper-right corner of any page, click the My Setup global link.

- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 Scroll down to the Delegated Users section, and click Add Users.
NOTE: If you do not see the Delegated Users section, your company administrator can add it to your view.
- 5 In the Delegated Users Edit page, click the Lookup icon to select the users that you want to add to the Delegated Users list.
- 6 If you want to designate a role for this user, select a role from the Delegated User Role picklist.
- 7 Click Save.

Related Information

[About User Delegation](#) (on page 1124)

Reviewing Your PIM Sync Client Activity

You can review your PIM Sync client activity to track how often you synchronize records between Oracle CRM On Demand and PIM (Personal Information Manager) applications, such as Microsoft Outlook and Lotus Notes. For more information, see [Synchronizing with PIMs](#) (on page 637).

NOTE: Your company administrator sets up Oracle PIM Sync On Demand, as well as clients such as Oracle Outlook Email Integration On Demand and Oracle Offline On Demand for your company.

To review PIM Sync client activity

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 Scroll down to the Audit Trail section to review your PIM Sync client activity.

Granting Sign In Access to Technical Support

You can grant permission to a technical support representative to access your Oracle CRM On Demand session. This access might be necessary to allow the technical support representative to troubleshoot a problem.

To grant sign in access to others

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the Sign In Access link.
- 4 On the Sign In Access page, enter a date and time range for the period of time you are allowing that person to have access to your session.
- 5 Save the record.

Note: If you want to terminate sign in access prior to the Access End Date that you specified, and you have already granted access using this feature, enter a new date and time range with dates that are in the past.

Displaying Your Tabs

The tabs across the top of your pages provide the starting point for managing your data. The role your company administrator assigns to you determines what tabs are available to you and the order in which they initially appear.

NOTE: You can personalize your tabs only if the Personalize Tabs privilege is enabled for your role. For more information, contact your company administrator.

To change your tab order

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Layout Personalization section, click the Personal Layout link.
- 3 In the Personal Tab Layout section, click the Tab Layout link.
- 4 In the Available Tabs section, select the tab you want to add, and then click the right arrow button to move it from the Available Tabs section to the Selected Tabs section.
NOTE: You can select more than one tab at a time by holding down the SHIFT or CTRL key when you click to select the tabs.
- 5 In the Selected Tabs section, select one tab at a time and use the arrows to move the tab up or down until it appears in the order you want.
- 6 Save the record.

Changing Your Detail Page Layout

Your company administrator determines the type and order of the related information that appears on each Detail page. Related information shows the different records, such as notes or activities, that can be linked to

the selected record. For example, notes and activities are related information that can be linked to opportunities or contacts.

You can change the order of the related information or hide any related information that you are not using. Changing these settings affects only your view of the application.

NOTE: Your company administrator might have disabled the layout permissions for the Detail page. In this case, the Personal Layout section indicates that you do not have permission to view the Layout Edit page.

To edit the layout of your Detail pages

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Layout Personalization section, click the Personal Layout link.
- 3 In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.
- 4 In the Available Related Information section, select the related information section you want to appear and use the right arrow to move it to the Displayed Related Information section.
TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key on your keyboard when you click to select the selections.
- 5 In the Displayed Related Information section, select one section at a time and use the arrows to move the related information section up or down until it appears in the order you want.
- 6 Save the record.

NOTE: From your Detail pages, you can also edit the page layout by clicking the Edit Layout link in the upper right corner. Clicking the Edit Layout link on a Detail page takes you to the Personal Layout page for that Detail page.

Changing Your Homepage Layouts

If your user role includes the Personalize Homepages privilege, you can add and remove sections from your Homepage layouts (My Homepage, Account Homepage, Contact Homepage, Lead Homepage, Opportunity Homepage, and Service Request Homepage). Your company administrator configures the Homepage layouts that you see by default.

NOTE: You can also personalize Homepages by clicking the Edit Layout link on each Homepage.

To change your Homepage Layout

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Layout Personalization section, click Personal Layout.

- 3 In the Personal Layout page, in the Personal Homepage Layout section, click the Homepage Layout that you want to modify (for example My Homepage Layout).
- 4 In the Available Sections section of the page, select the section that you want to display on your Homepage and use the arrows to move the section to the Left Side section or the Right Side section.
TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key when you click to select the sections.
- 5 In the Left Side or Right Side section, select one section at a time and use the arrows to move the section up or down until it appears in the order you want on the Homepage.
- 6 Save the record.

Changing Your Action Bar Layout

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

If the Action bar is available to your user role, then it appears on the left side of all Oracle CRM On Demand pages by default. You can hide and show the Action bar as required. For more information, see [Showing or Hiding the Action Bar](#) (on page 32).

If the Personalize Action Bar privilege is enabled for your role, then you can display or hide any of the Action bar sections, including Web applets, that your company administrator has made available in the Action bar layout for your user role. For more information about your user-role settings, contact your company administrator.

To change your Action bar layout

- 1 In the upper-right corner of any page, click the My Setup global link.
 - 2 In the Layout Personalization section, click Personal Layout.
 - 3 In the Personal Layout page, in the Personal Action Bar Layout section, click Action Bar Layout.
 - 4 In the Personal Layout page, use the arrows to move the sections as follows:
 - Move the sections you want to appear in the Action bar from the Available Sections section to the Displayed Sections section
 - Move the sections you do not want to appear in the Action bar from the Displayed Sections section to the Available Sections section.
- NOTE:** For the Action bar to show in Oracle CRM On Demand, there must be at least one section in the Displayed Sections section of the page.
- 5 Scroll to the Customize Favorites section and select the appropriate option to have new favorites added to the start or the end of a favorites list (Favorite Records and Favorite Lists), depending on your preference. For more information on Favorite Records, see [Favorite Records Page](#) (on page 68). For more information on Favorite Lists, see [Favorite Lists Page](#) (on page 80).

- 6 Save the record.

Setting Up Your Calendar

To set up your calendar, complete the steps in the following procedure. For more information on calendars, see [Calendar and Activities](#) (on page 117).

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

To set up your calendar

- 1 In the upper right corner of any page, click the My Setup global link.
- 2 In the Calendar Setup section, click Calendar Settings.
- 3 To select the calendar view you would like to display by default on the calendar home page:
 - a Click Default Calendar View.
 - b From the Default Calendar View drop-down, select a calendar view.
- 4 To share your calendar with another user:
 - a Click Share Calendar.
 - b In My Calendar Share List, click Add Users.
 - c In the Grant New Users window, use the Lookup icon to add users with whom you want to share your calendar.
- 5 To set up custom group calendar views:
 - a Click Manage Group Views.
 - b In My Custom Views, click Add.
 - c Complete the fields in the Manage View window.

Setting up custom group calendar views allows you to manage your view to other users availability. When you create a new appointment, go to the Group Calendar tab and select the Calendar group you or your company administrator created to view availability.

- 6 Save the record.

Accessing the Data and Integration Tools

On your Personal Homepage, you can find links to tools that allow you to import data and to integrate data in Oracle CRM On Demand with other applications.

NOTE: Your company administrator sets up and enables access to the available clients. The clients include: Oracle PIM Sync On Demand, Oracle Outlook Email Integration On Demand, and Oracle Offline On Demand.

To access the data and integration tools

- 1** In the upper right corner of any page, click the My Setup global link.
- 2** In your Personal Homepage, in the Data and Integration Tools section, click the link for the tool you want to use:
 - To import your contacts, click Data and Integration Tools, then click Import Your Contacts.
For more information, see [Importing Your Contacts](#) (on page 198).
 - To use Oracle Offline On Demand (the Offline client), click Data and Integration Tools, then click Oracle Offline On Demand.
For more information, see [Using the Offline Client](#) (on page 628).
 - To synchronize contacts, appointments, and tasks between Oracle CRM On Demand and a Personal Information Manager (PIM), click Data and Integration Tools, then click Oracle PIM Sync On Demand.
For more information, see [Synchronizing with PIMs](#) (on page 637).
 - To link specific emails to account, contact, lead, opportunity or service request records in Oracle CRM On Demand, click Data and Integration Tools, then click Oracle Outlook Email Integration On Demand.
For more information, see [Adding Emails from Microsoft Outlook and Lotus Notes](#) (on page 654).
 - To embed a widget, click Embed CRM On Demand Content.
For more information, see the following topics:
 - [Embedding a Favorite Lists Widget](#) (on page 624)
 - [Embedding a Message Center Widget](#) (on page 625)
 - [Embedding a Reports Widget](#) (on page 625)
 - [Embedding a Simple List Widget](#) (on page 626)

Related Topic

See the following topic for related information about data and integration tools:

- [About On Demand Widgets](#) (on page 623)

About On Demand Widgets

Oracle CRM On Demand provides you with HTML code that you can use to embed a number of On Demand widgets in desktop applications that support Web widgets. You can also embed Web widgets in portals, or in any standalone Web page. A Web widget is a portable piece of third-party code that can be embedded in HTML. If your company administrator has made this feature available to you, HTML code that you can use to

embed On Demand widgets in other applications is provided in the Embed CRM On Demand Content page in Oracle CRM On Demand.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears. Then, you can enter your sign-in details to access your Oracle CRM On Demand Favorite Lists, Message Center, and so on. You can open Oracle CRM On Demand in a new browser window by clicking Open Application.

Note: This feature is available in your Oracle CRM On Demand application only if it is enabled by your company administrator. To confirm if this feature is enabled in your Oracle CRM On Demand application, click the My Setup global link. If the feature is enabled, the Embed On Demand Content link is available on your Personal Homepage. If your company administrator has not assigned you permission to use On Demand widgets, and you try to sign in to an On Demand widget, the sign-in attempt fails.

The following On Demand widgets are available:

- **Favorite Lists Widget.** This On Demand widget displays your favorite Oracle CRM On Demand lists, for example, All Opportunities, My Accounts, and so on. Favorite Lists are located in the Action Bar of the Oracle CRM On Demand Homepage. For more information on embedding the Favorite Lists Widget, see [Embedding a Favorite Lists Widget](#) (on page 624).
- **Message Center Widget.** This On Demand widget allows you to access messages received in Oracle CRM On Demand without requiring you to first sign in to Oracle CRM On Demand. The Message Center is located in the Action Bar of the Oracle CRM On Demand Homepage. For more information on embedding the Message Center Widget, see [Embedding a Message Center Widget](#) (on page 625).
- **Reports Widget.** This On Demand widget displays reports created in Oracle CRM On Demand. For more information on embedding the Reports Widget, see [Embedding a Reports Widget](#) (on page 625).
- **Simple List Widget.** This On Demand widget displays a one-column list of shortcuts to Oracle CRM On Demand records. For more information on embedding the Simple List Widget, see [Embedding a Simple List Widget](#) (on page 626).

Embedding a Favorite Lists Widget

You can embed your favorite lists from Oracle CRM On Demand (for example, All Opportunities, My Accounts, and so on) in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages.

NOTE: This feature is available to you in Oracle CRM On Demand only if the feature is enabled by your company administrator.

To embed Favorite Lists

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.
- 3 From the Favorite Lists Widget section, copy the HTML code to your application.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.

- 4 Enter your Oracle CRM On Demand sign-in details to access your Favorite Lists data.

TIP: You can use the Add to Google button to quickly add this On Demand widget to iGoogle.

Embedding a Message Center Widget

You can embed the Oracle CRM On Demand Message Center in desktop applications that support Web widgets. You can also embed it in portals and in standalone Web pages. Using the Message Center widget, you can access messages received in Oracle CRM On Demand without logging in to Oracle CRM On Demand. The Message Center is located in the Action Bar of the Oracle CRM On Demand Homepage.

NOTE: This feature is available to you in Oracle CRM On Demand only if the feature is enabled by your company administrator.

To embed Message Center

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.
- 3 From the Message Center Widget section, copy the HTML code to your application.
When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.
- 4 Enter your Oracle CRM On Demand sign-in details to access the messages in your Message Center.
- 5 Click Refresh to access the new messages.

TIP: You can use the Add to Google button to quickly add this On Demand widget to iGoogle.

Embedding a Reports Widget

You can embed reports and dashboards from Oracle CRM On Demand in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages without requiring you to log in to the Oracle CRM On Demand application.

NOTE: This feature is available to you in Oracle CRM On Demand only if the feature is enabled by your company administrator.

To embed reports and dashboards

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.

- 3 In the Reports Widget section, in the Type field, select Single Report or Dashboard.
- 4 In the Path field, enter the paths of the reports (or dashboards) that you want to display.
NOTE: These paths must be separated by colons (:). For more information on creating report paths, see [Creating Homepage Custom Reports](#) (on page 1066).
- 5 Click Show New HTML.
- 6 Copy the HTML code to your application.
When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.
- 7 Enter your Oracle CRM On Demand sign-in details to access your reports or dashboards.

For more information on reports, see [Reports](#) (on page 675). For more information on dashboards, see [Dashboards](#) (on page 961).

Embedding a Simple List Widget

This On Demand widget allows you to embed a simple list of records in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages without requiring you to log in to the Oracle CRM On Demand application. The Simple List widget displays shortcuts to lists for the standard record types except Fund and Fund Request.

NOTE: This feature is available in your Oracle CRM On Demand application only if it is enabled by your company administrator.

To embed Simple Lists

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.
- 3 In the Simple List Widget section, select a list from the menu.
- 4 Copy the HTML code to your application.
When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.
- 5 Enter your Oracle CRM On Demand sign-in details to access your list.
- 6 To view a different list, click Configure.

NOTE: This action changes the available list for the duration of the session. You can change the list as many times as you want during your session. However, the list reverts to the original list after you log out of your session.

13 Working with Other Applications

Oracle CRM On Demand works with these applications to provide additional functionality:

- **Oracle Offline On Demand**

You can copy accounts (and their linked contacts and opportunities), tasks, and appointments to Oracle Offline On Demand (the Offline client) on your laptop or desktop. This allows you to work offline, disconnected from the Internet. When you reconnect to the Internet, you can upload your changes to your company's Oracle CRM On Demand application.

- **Oracle PIM Sync On Demand**

You can copy your contacts, tasks, and appointments from Oracle CRM On Demand to Microsoft Outlook and Lotus Notes, and conversely. After updating those records, you can run a synchronization session to keep those records consistent between the two applications. You use Oracle PIM Sync On Demand to perform the synchronization.

- **Microsoft Outlook and Lotus Notes Email Integration**

Through Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand, you can link specific emails to account, contact, lead, opportunity or service request records in Oracle CRM On Demand. This feature allows you to store critical emails with the records to which they relate.

- **Microsoft Word**

You can use your Oracle CRM On Demand data to create mail merges and mass email in Microsoft Word using Oracle CRM On Demand Integration for Office.

- **Microsoft Excel**

You can create refreshable offline Microsoft Excel reports containing your Oracle CRM On Demand data using Oracle CRM On Demand Integration for Office.

- **Segmentation Wizard**

You can use the Segmentation Wizard to generate contact segments (that is, lists of contacts) based on a combination of account, contact, opportunity, and service request fields in Oracle CRM On Demand.

Checking Your System Requirements

Make sure your computer meets the system requirements before you install the software. For more information, see the [Oracle CRM On Demand Web site](http://crmondemand.oracle.com/en/products/system-requirements/index.html) <http://crmondemand.oracle.com/en/products/system-requirements/index.html>.

NOTE: For additional system requirement information you can refer to the individual download page for each of the desktop integration clients.

To check the system requirements

- 1 From any page in Oracle CRM On Demand, click the My Setup link.
- 2 On the Personal Homepage, click the Data & Integration Tools link.
- 3 On the Data & Integration Tools page, click the link in the section for the application you are interested in.
- 4 In the System Requirements section on the page that appears, make sure your hardware and software meet the listed requirements.

Using the Offline Client

Using Oracle Offline On Demand (the Offline client), you can do much of your work, such as adding accounts, updating opportunities linked to accounts, marking tasks as completed, and setting up appointments, while you are disconnected from the Internet.

To work with the Offline client, you first install the client on your laptop or desktop computer, as described in [Installing the Offline Client](#) (on page 630). Then, you copy or download the records from Oracle CRM On Demand to your computer. When you download records, you can limit the records that you want to include, based on the criteria that you set up.

After downloading, you can view or update those records as well as create new records while working offline. The user interface (UI) for Offline client is similar to Oracle CRM On Demand UI, but Offline client offers a subset of the functionality that Oracle CRM On Demand has. The following features are not supported in the Offline client:

- **Business Process Management.** Because the Offline client operates as a disconnected client, it does not support server-based functions, such as workflows, field validation, custom default values, or postdefault values. For more information, see [About Field Management](#) (on page 1033).
- **Page Layouts.** Based on the limits in Microsoft Excel, the maximum number of fields that can be displayed in the Offline client page layout is 250. Because the Offline client inherits page layouts from the online page layout defined for the user, this limit affects the Offline client as well.
- **Tab Display.** To download records successfully to the Offline client, the corresponding record type tab must be displayed as part of the user's online tab layout. For example, if you want to download accounts to the Offline client, then the Accounts tab must be displayed in Oracle CRM On Demand for the user.

When you reconnect to the Internet, you can upload the new record information to Oracle CRM On Demand at your company. The process of keeping both sets of records consistent is called *synchronization*.

NOTE: To use the Offline client, the administrator must set the Enable Offline Access privilege in your user role.

Related Topics

See the following topics for related information:

- [What Records You Can Use Offline](#) (on page 629)
- [Installing the Offline Client](#) (on page 630)
- [Downloading Records to Your Offline Client](#) (on page 633)
- [Uploading Records From Your Offline Client](#) (on page 636)
- [About Conflict Resolution with the Offline Client](#) (on page 636)

What Records You Can Use Offline

You can download a subset of the total information that you have access to in Oracle CRM On Demand. The following table shows you what record types you can download or upload, and the records that are linked to those records.

This primary record type	Contains the secondary record types when downloaded or uploaded	Which also contains the following tertiary record types
Accounts	<ul style="list-style-type: none"> ■ Opportunities 	<ul style="list-style-type: none"> ■ Contacts ■ Appointments ■ Tasks
	<ul style="list-style-type: none"> ■ Contacts 	
	<ul style="list-style-type: none"> ■ Completed Activities 	
	<ul style="list-style-type: none"> ■ Open Activities 	
Contacts	<ul style="list-style-type: none"> ■ Accounts 	<ul style="list-style-type: none"> ■ Opportunities ■ Contacts ■ Appointments ■ Tasks
	<ul style="list-style-type: none"> ■ Opportunities 	<ul style="list-style-type: none"> ■ Contacts ■ Appointments ■ Tasks
	<ul style="list-style-type: none"> ■ Open Activities 	
	<ul style="list-style-type: none"> ■ Completed Activities 	
	<ul style="list-style-type: none"> ■ Contact Relationships 	
Opportunities	<ul style="list-style-type: none"> ■ Contacts 	<ul style="list-style-type: none"> ■ Accounts

This primary record type	Contains the secondary record types when downloaded or uploaded	Which also contains the following tertiary record types
		<ul style="list-style-type: none"> ■ Contacts ■ Appointments ■ Tasks
	<ul style="list-style-type: none"> ■ Open Activities 	
	<ul style="list-style-type: none"> ■ Completed Activities 	

Installing the Offline Client

All users except those with the Service Representative or Service Manager roles have the Enable Offline Access privilege enabled by default, to allow them to install Oracle Offline On Demand (the Offline client) on their desktop or laptop computer. Your company administrator can set up the Service Representative and Service Manager roles with the privilege required to install the Offline client using role management.

Before you begin. Make sure your computer meets the system requirements specified for Oracle Offline On Demand in Oracle CRM On Demand. For information on how to check the system requirements, see [Working with Other Applications](#) (on page 627).

To install the Offline client

- 1 Sign in to Oracle CRM On Demand.
- 2 Click the MySetup link at the top of any page.
- 3 On the Personal Homepage, click the Data & Integration Tools link.
- 4 On the Data & Integration Tools page, click the Oracle Offline On Demand link.
- 5 On the Oracle Offline On Demand page, read the information, and then click the Download Oracle Offline On Demand link.
- 6 On the second Oracle Offline On Demand page, read the additional information, and then click the Download Oracle Offline On Demand link.
- 7 In the window, you can:
 - Click Save to copy the Offline_OnDemand.exe file to your hard drive to install while you are offline. (Recommended)
 - Click Run to begin the installation. You need to stay connected to the Internet to continue with the installation.

- 8 Follow the instructions to complete the installation.
- 9 If you copy the file, open the Offline_OnDemand.exe file.
- 10 If you receive a message about enabling macros when opening Offline_OnDemand.xls, make sure you enable macros and select the option to always trust macros from Oracle.

If you have problems opening the Offline client when using Excel 2007, do the following:

- **If you receive compatibility errors.** Open Microsoft Excel. In the Excel window, click Open file, and select Offline Client in the application window.
- **If you see a run-time error on the screen, or if the Offline client is open, but you cannot see it.** Do the following:
 - a Close the Offline client.
 - b Click the main Excel menu at the top of the screen.
 - c Select Excel Options.
The Excel Options window opens.
 - d Select Trust Center in the navigation pane.
 - e Click Trust Center Settings.
The Trust Center Settings window opens.
 - f Click ActiveX Settings in the navigation pane.
 - g Select Enable all controls without restrictions and without prompting.
 - h Click Macro Settings in the navigation pane.
 - i Select Disable all macros except digitally signed macros.
 - j Click OK, and close Microsoft Excel.
 - k Open the Offline client.

Configuring the Offline Client

This topic describes how to configure the download settings of the Oracle Offline On Demand using the System Information Page.

To configure the system information for the Offline Client

- 1 Open the Offline client.
- 2 Click Help, and then Information to open the System Information page.

3 Use the following information to configure your system requirements:

- **User Sign ID.** The Oracle CRM On Demand sign-in used during the last successful download or upload. This field is automatically populated.
- **Single Sign-On ID.** Enter your Single Sign-On ID. Populate this field only if your company is using Single Sign-On for Oracle CRM On Demand.
- **Authentication Type.** Select one of the following types of sign-in the Offline client must use:
 - **User Sign-In.** Offline client prompts the user to enter the standard Oracle CRM On Demand sign-in and password credentials. This is the default setting.
 - **User Sign-In/Single Sign-On.** Offline client prompts the user to select the type of sign-in to use for each upload and download request.
 - **Single Sign-On.** Offline client prompts the user to enter the credentials for a Single Sign-On sign-in.
- **Save Download Settings.** Select True from the menu if you want Offline client to save the primary record list and the appointments and tasks settings in subsequent downloads. If you select True, the settings are saved for your next successful download. If you select False, the Offline client prompts you to select a primary record list each time that you request a download of data.

NOTE: If the saved primary record type list is renamed or deleted, Oracle CRM On Demand prompts you to select a new list for your next download request.

- **List Downloaded.** This is the last successfully downloaded primary record type list selected in the Download to Offline Client window. This setting is read-only.
- **Appointments and Tasks Downloaded.** This is the last successfully downloaded appointments and tasks setting selected in the Download to Offline Client window. This setting is read-only.
- **Enable Log.** Select True before you download or upload data in order to generate a log file for Customer Care.

NOTE: The following properties in the System Information page are read-only: Download Time, On Demand Server, Protocol, Offline Version, Build Version, Operating System, Excel Version, Proxy Server Login, Proxy Server Password, and Download Timeout.

4 Click Home to return to the Offline client.

About Administering the Offline Client

Company administrators can configure the Offline Client Edit Access setting for Oracle Offline On Demand (the Offline client) from the Company Profile page in Oracle CRM On Demand.

This setting determines when the edit access for records is verified for a user. The three options for the Offline Client Edit Access setting are as follows:

- **Verify on Upload.** When records are uploaded from Oracle Offline On Demand to Oracle CRM On Demand, the edit access for a record is verified. This setting is recommended for optimal performance.
- **Verify on Download.** When the record is edited, the edit access for a record is verified in Oracle Offline On Demand.

- **None.** If this option is selected, Oracle CRM On Demand verifies the edit access in the same manner as the Verify on Download option.

For more information on the Company Profile page, see [Setting Up Your Company Profile and Global Defaults](#). (see "[Setting Up Your Company Profile and Global Defaults](#)" on page 996)

Downloading Records to Your Offline Client

This topic describes how to download records to your Oracle Offline On Demand (the Offline client) and how to save your download settings in Oracle Offline On Demand.

Before you begin:

- In Oracle CRM On Demand, set up the filtered lists that you want to use to restrict the account, contact or opportunity records that are downloaded to your computer. For instructions, see [Working with Lists](#) (on page 69).
- You can download 250 accounts, 750 contacts, or 750 opportunities at one time. If your records exceed that number, Oracle CRM On Demand prompts you to reduce the number of records in your download request. Use filtered lists to reduce the number of records.

NOTE: Your company administrator can request an increase in the number of records available for download. However, increasing the number will increase the amount of time it takes to complete the download process.

- Date and time are determined by regional settings on your computer. Within regional settings, it is possible to change the formatting of the default date and time. The separators for date and time cannot be the same. If they are the same, downloading records to Oracle Offline On Demand (the Offline client) fails. For example, you cannot use dashes to separate the day and month for dates and also to separate the hour and minute for time.
- You must be connected to the Internet to download or upload your records.

After installing the Offline client, download the records that you want to use while working offline. The complete set of records that you can download consists of those you own, and those shared with you.

NOTE: Before you start downloading your records, configure your settings in Office 2007 to enable macros.

To download records

- 1 Open the Offline client.
- 2 Click the Download button.
- 3 When prompted to sign in to Oracle CRM On Demand, enter your user ID and password.

NOTE: You must set up your security credentials properly for Oracle CRM On Demand, including the security questions. If you do not set up your security credentials, a Page Not Found error might be displayed.

- 4 Do one of the following:
 - For Accounts, select which accounts you want to download from the list.

- For Contacts, select which contacts list you want to download from the list.
- For Opportunities, select which opportunities list you want to download from the list.

NOTE: All the lists that you or your managers created for you appear in the primary record list in the Offline client.

5 If you want to download appointments and tasks associated with your primary record type, select the Tasks and Appointments that you want to download:

- **My Default Appointments and Tasks.** These are the appointments and tasks from the past 60 days plus 6 months into the future where you are the owner, the delegated by user, or a user on the activity record.
- **My Extended Appointments and Tasks.** These are the appointments and tasks from the previous year plus 6 months into the future where you are the owner, the delegated by user, or a user on the activity record.
- **Default Appointments and Tasks.** These are the appointments and tasks from the past 60 days plus 6 months into the future.
- **Extended Appointments and Tasks.** These are the appointments and tasks from the previous year plus 6 months into the future.
- **Next 7 Days (plus past 60 days).** These are the appointments and tasks for the next 7 days plus the past 60 days.
- **Next 14 Days (plus past 60 days).** These are the appointments and tasks for the next 14 days plus the past 60 days.
- **Next 21 Days (plus past 60 days).** These are the appointments and tasks for the next 21 days plus the past 60 days.
- **Next 31 Days (plus past 60 days).** These are the appointments and tasks for the next 31 days plus the past 60 days.
- **Next 60 Days (plus past 60 days).** These are the appointments and tasks for the next 60 days plus the past 60 days.
- **None.** No appointments or tasks are downloaded.

NOTE: The selected Appointments and Tasks list filters secondary level activities only; that is, only those appointments and tasks directly related to your selected primary record type. Tertiary level activities always download the default setting of all records 60 days prior to today and 6 months into the future.

NOTE: The lists for Tasks and Appointments are built into the product and you cannot change them.

6 Click Download.

Progress bars indicate how the three-step download process is progressing:

- a** Server request to retrieve data.
- b** Gathering of data for the Offline client.
- c** Processing the data within the Offline client.

When the process is complete, a message notifies you that your download is successful.

TIP: To help you determine if any errors occurred during a download, enable error logging in Offline client. When it is enabled and if an error message appears, navigate to the Offline directory to check the error log file for the specific error message. For more information on enabling error logging, see [Configuring the Offline Client](#) (on page 631).

To save your download settings in the Oracle Offline On Demand

- 1 Open the Offline client.
- 2 Click Help, and then Information to open the System Information page.
- 3 Select True from the Save Download Settings menu.

This setting enables you to save the selected lists in subsequent downloads when using the Oracle Offline On Demand. It saves both the primary record list and the appointments and tasks setting values from the previous downloads.

Adding and Updating Records in Your Offline Client

You can add or update records in Oracle Offline On Demand (your Offline client), and later upload them to Oracle CRM On Demand.

Before you begin. Make sure the time zone on your laptop or desktop computer is set to the same one used in your Oracle CRM On Demand application. For information on viewing your time zone in Oracle CRM On Demand, see [Updating Your Personal Details](#) (on page 604).

Adding and updating records works the same way in your Offline client as it does in your company's Oracle CRM On Demand application.

- You can add records from the Create box in the left Action bar or wherever you see a New button on a page.
- You can update records wherever you see an Edit button or an Edit link.

If your company administrator has set the Offline Client Edit Access field to Verify On Upload, all records display an Edit button or link, and Oracle CRM On Demand verifies your edit access the next time that you upload records from the Offline client. For more information on the Offline Client Edit Access setting, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).

If you do not have appropriate access to edit a record, Oracle CRM On Demand issues an error message stating that you do not have permission to modify all records. It also states that only some records were uploaded and instructs you to refer to the log file for more details. This error message provides a link to the automatically generated log file, which provides a list of the records that failed to upload, listed in order of transaction, and then in order of record. If you receive an error message, Oracle CRM On Demand continues to upload the records for which you have the appropriate access.

TIP: The Offline Status information on the left displays the number of changes that you make while working offline.

Related Topics

See the following topic for related information:

- [Uploading Records From Your Offline Client](#) (on page 636)

Uploading Records From Your Offline Client

After you add or update records in Oracle Offline On Demand (your Offline client), you upload the new information to your company's Oracle CRM On Demand application.

NOTE: When you want to delete records, delete them in Oracle CRM On Demand. Do not delete records in the Offline client. Also, if you want to transfer the ownership of an account from yourself to another employee, upload the account to Oracle CRM On Demand first, and then change the owner in Oracle CRM On Demand.

Before you begin. You must be connected to the Internet to upload your records.

To upload records

- 1 In the Offline client, click the Upload button.

- 2 Sign in to Oracle CRM On Demand.

A progress bar appears, followed by a message notifying you of a successful upload. If you receive an error message, the uploading process continues but ignores the records with the conflicting changes.

- 3 When the upload is completed, you are prompted to perform a download.

NOTE: You must download a new data set; otherwise, your Offline client will be set to read-only.

- 4 Click Yes and continue with the download.

Related Topics

See the following topic for related information:

- [Adding and Updating Records in Your Offline Client](#) (on page 635)
- [About Conflict Resolution with the Offline Client](#) (on page 636)

About Conflict Resolution with the Offline Client

Conflicts occur at the field level when the same field in the same record has been updated in Oracle CRM On Demand and in Oracle Offline On Demand (the Offline client). For example, another employee might update an email address in Oracle CRM On Demand while you updated the same email address in the Offline client. This conflict is recognized during the synchronization.

By default, the field change in Oracle CRM On Demand wins the conflict resolution. However, if an error cannot be resolved by this rule, you need to address each issue manually. To review the errors, open the UploadError file in the Offline On Demand directory or print it.

The errors are saved to a log file, which is in the same directory as the Offline client. The format of the log file name (UploadErrorYYYY-MM-DD.html) indicates the date on which the changes were made, for example, UploadErrors2009-10-22.html.

TIP: To correct the errors, print the log file, and make your changes in Oracle CRM On Demand.

Synchronizing with PIMs

You can synchronize contacts, appointments, and tasks between Oracle CRM On Demand and the following PIMs:

- Microsoft Outlook
- Lotus Notes

This allows you to update contact records, schedule appointments, and keep To-Do lists in either application and then synchronize the information.

NOTE: Your company administrator sets up and enables access to Oracle PIM Sync On Demand.

About Multiple User Synchronization

The PIM Sync client supports multiple users synchronizing from the same computer, or the same user synchronizing from multiple computers. Each user does not have to synchronize from his or her computer, however, a single user ID cannot synchronize from more than one computer at the same time; this action will corrupt data.

Note: Users must be logged in to Windows on the computer that they are trying to synchronize from.

About Unicode Support

The PIM Sync client supports a subset of the languages that are supported by Oracle CRM On Demand. The PIM Sync client user interface is available in German, Italian, British-English, English U.S., Spanish, French, Japanese, Simplified Chinese, Korean, Portuguese, and Traditional Chinese. It also supports data synchronized in these languages.

About Contacts

New and updated contact records are synchronized between the PIM application and Oracle CRM On Demand.

Synchronizing team contacts. By default, the PIM Sync client synchronizes contacts that you own. If you also want to synchronize contacts to which you have access through a team; that is, contacts that are owned by other users, ensure the Enable Sync of Team Contacts check box (located under Additional Information under Personal Preferences) is selected.

Deleting contacts. When you want to delete contacts, delete them from Oracle CRM On Demand, not from the PIM application. Otherwise, during the next synchronization, the contacts from Oracle CRM On Demand are added again to the PIM application.

Address information. The business address fields in the PIM application are mapped to the alternate address fields in Oracle CRM On Demand. Home address information is not synchronized.

Matching account information. You might have an account or company associated with a contact in the PIM application. During synchronization, the PIM application attempts to match this account or company with an existing account in Oracle CRM On Demand. The PIM application can use Fuzzy Matching to search for accounts.

NOTE: Fuzzy Matching is enabled by default when Oracle CRM On Demand is first set up for a new company. If your user role has the appropriate privilege, you can disable Fuzzy Matching on the company profile. To disable Fuzzy Matching, select the Disable PIM Sync Extended Account Association check box in the Company Security Settings section of the Company Profile page. For information on how to change company profile settings, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).

If Fuzzy Matching is disabled, the PIM Sync client searches for an exact match of the requested account, and performs the following actions:

- If only one account is found, the PIM Sync client associates the requested account with the account that was found.
- If more than one account is found, the PIM Sync client associates the requested account with an account from the search results, with no specified location.
- If more than one account is found, and all the accounts have specified locations, the PIM Sync client creates a new account for the requested account and uses it.

CAUTION: It is not recommended that you disable Fuzzy Matching because if you do, the PIM Sync client will duplicate any records that are not identical.

If Fuzzy Matching is enabled, the PIM Sync client performs the following actions:

- It searches for an exact match to the account. This is the same action that is performed when Fuzzy Matching is disabled.
- If no exact match is returned, the PIM Sync client performs a further search, this time embedding wildcards for matches that are similar to the search string.

For example, if the account name has special characters, such as an underscore, comma, period, and so on, the PIM Sync client replaces them with a wildcard character such as an asterisk. In that case, if the PIM Sync client searches for an account called "I.B.M. Hardware Division", an account such as "Italian BM Hardware Division 132426" is returned as a match.

If the name does not contain special characters, the PIM Sync client appends one wildcard character to the end of the requested account. In that case, if the PIM Sync client searches for an account called "IBM Hardware Division", an account such as "IBM Hardware Division (Global Operation)" is returned as a match.

- If no similar match is returned, the PIM Sync client creates and uses a new account for the requested account.

If the Disable PIM Sync Account Association check box is selected on the company profile, searching for an account match is disabled. Instead, the PIM Sync client populates the PIM Company Name field on the contact record.

NOTE: Fuzzy Matching is case sensitive. If Fuzzy Matching is enabled, users must verify that the requested account is correctly associated with the matched account.

About Appointments and Tasks

New, updated, or deleted appointment and task records are synchronized between the PIM application and Oracle CRM On Demand.

Reminders. The reminder in your PIM that notifies you of upcoming appointments, such as a 15-minute reminder, or of tasks that are past their due date does not exist in Oracle CRM On Demand. Therefore, you must manually set the reminder in your PIM application for any new appointments or tasks that are created in Oracle CRM On Demand, and then copied over to your PIM application during synchronization.

Linked Records. If an appointment or task is linked to a contact, account, opportunity, lead, campaign, or service request in Oracle CRM On Demand, this record type is named in the first line of the Body field in Microsoft Outlook. For example:

Related To: Contact: Maria Sanchez; Account: XYZ Corporation; Service Request: Provide upgrade.

Because the Related To information lists the records that are linked to the appointment or task, no changes you make to that information affect Oracle CRM On Demand. Unlike other information that appears in the Body field, the Related To line is not copied to the Description field in Oracle CRM On Demand.

NOTE: The PIM Sync client does not synchronize contacts for an appointment record, or for other appointment attendees. Only the owner of the appointment is synchronized.

Group Meetings. Employees at your company can set up a group meeting in the PIM application, and then add it to Oracle CRM On Demand during synchronization. If you delete that meeting in Oracle CRM On Demand, and then synchronize again with the PIM application, one of the following events happens:

- If you are the owner of the record (you set up the meeting), the appointment is deleted from your PIM calendar. However, the group meeting is retained in the attendees' PIM calendars.
- If you are not the owner of the group meeting but are one of the attendees, the appointment is also deleted in your PIM calendar. However, your name remains on the attendee list in the others' PIM calendars.

Recurring Appointments and Tasks. You must manage recurring appointments using your PIM application. During the synchronization, recurring appointments are uploaded to Oracle CRM On Demand and appear in the Calendar. All updates and deletions you make in your PIM application continue to be synchronized between the two applications.

Each instance of a recurring task appears as a separate task in Oracle CRM On Demand. If you change an individual task record in Oracle CRM On Demand, that change is preserved; it is not overwritten during subsequent synchronizations.

Maximum number of records. To reduce synchronization time, the number of recurring appointments and tasks created in Oracle CRM On Demand has a maximum limit, as shown in the following table.

Recurring Frequency	Record Limit
Daily	31
Weekly	53
Monthly	13
Quarterly	5
Yearly	2
Other	50

For example, if you have a daily appointment in Microsoft Outlook, and you synchronize on March 1, Oracle CRM On Demand creates 31 daily appointments (March 1–March 31). If you synchronize again a week later (on March 8), 31 daily appointments are created, but this time they extend from March 8–April 7.

About the Synchronization Engine and Field Mapping

This topic describes how the Synchronization Engine identifies matching records and explains the field mapping required when performing a synchronization.

Identifying Matching Records

When you run the initial synchronization between Oracle CRM On Demand and your PIM application, the Synchronization Engine reviews certain key fields to match records in your PIM application and Oracle CRM On Demand.

When you add new contacts or update the account name of an existing contact, Oracle PIM Sync On Demand (the PIM Sync client) executes fuzzy matching on the account and contact names, which is enabled by default when Oracle CRM On Demand is first set up for a new company. The PIM Sync client ignores differences in punctuation and capitalization when determining matches. For more information on fuzzy matching, see [Synchronizing with PIMs](#) (on page 637).

The following rules are used to determine if two names are the same:

- Case is ignored.
- Punctuation is ignored.
- Spaces are ignored.

For example, if you have John Smith as a contact in Microsoft Outlook and JOHN SMITH as a contact in Oracle CRM On Demand, the Synchronization Engine treats them as one record. In addition, the Synchronization Engine treats the following variations of a specific account name (linked to contacts) as matches, and therefore the same record: TYC, T.Y.C, tyc.

CAUTION: If you use Oracle PIM Sync On Demand when the following Company Profile settings are set in Oracle CRM On Demand (that is, when fuzzy matching is disabled), then the PIM Sync client does not ignore differences in punctuation and capitalization when determining matches and, as a result, any records that are not identical are duplicated:

- Disable PIM Sync Extended Account Association
- Disable PIM Sync Account Association

The following table shows which fields are the key fields for synchronization, which fields are required, and how the fields are mapped between Oracle CRM On Demand and Outlook or Lotus Notes.

Field mappings are fixed and cannot be changed. Those fields that are not listed here are not mapped; the information is not retrieved from any of the applications.

Oracle CRM On Demand Contact Fields	Microsoft Outlook Contact Fields	Lotus Notes Contact Fields
Assistant Name	Assistant Name	Assistant
Assistant Phone #	Assistant Telephone Number	Assistant Phone

Oracle CRM On Demand Contact Fields	Microsoft Outlook Contact Fields	Lotus Notes Contact Fields
Account	Company Name (This is a key field for synchronization; it is used to distinguish the uniqueness of a record.)	Company
Contact City	Business Address City	Business City
Contact Country	Business Address Country	Business Country
Contact State/Province	Business Address State	Business State
Contact Address 1	Business Address Street	Business Street
Contact Zip/Postal Code	Business Address Zip	Business Zip
Department	Department	Department
Description	Body	Comment
Email	Email1 Address	eMail address
Mr./Mrs.	Title	Title
First Name (Required)	First name (Required)	First name
Middle Name	Middle name (This is a key field for synchronization; it is used to distinguish the uniqueness of a record.)	Middle name
Last Name (Required)	Last name (Required)	Last name
Work Phone	Business Telephone Number	Office phone
Work Fax #	Business Fax Number	Office fax
Cellular Phone #	Mobile Telephone Number	Cell phone
Job Title	Job title	Job title
Private	Private	Private

Oracle CRM On Demand Appointment Fields	Microsoft Outlook Appointment Fields	Lotus Notes Appointment Fields
Description	Body	Description
End Time (Date Portion Only) (Required)	End Date	End Date
End Time (Time Portion Only) (Required)	End Time	End Time
Location	Location	Location
Private flag	Private flag	Mark Private
Start Time (Date Portion only) (Required)	Start Date (This is a key field for synchronization; it is used to distinguish the uniqueness of a record.)	Begin Date
Start Time (Time Portion only) (Required)	Start Time	Begin Time
Subject (Required)	Subject (This is a key field for synchronization; it is used to distinguish the uniqueness of a record.)	Subject

Oracle CRM On Demand Task Fields	Microsoft Outlook Task Fields	Lotus Notes Task Fields
Completed Flag	Completed Flag	Completed
Description	Body	Description
Due Date (Required)	Due Date	Due Date
Priority (Required)	Priority	Priority
Private	Private	Mark Private
Status	Status	

Oracle CRM On Demand Task Fields	Microsoft Outlook Task Fields	Lotus Notes Task Fields
Subject (Required)	Subject (This is a key field for synchronization; it is used to distinguish the uniqueness of a record.)	Subject

NOTE: If the required fields are not filled, the record is not created during synchronization, and this information is recorded in the log file.

Process of Synchronizing Your Data Between Oracle CRM On Demand and Your PIM

To begin synchronizing your data between Oracle CRM On Demand and your PIM, perform the following tasks:

- 1 Confirm that Oracle CRM On Demand meets the system requirements. For more information on the supported PIM applications and versions, see [Oracle CRM On Demand System Requirements](http://crmondemand.oracle.com/en/products/system-requirements/index.htm) <http://crmondemand.oracle.com/en/products/system-requirements/index.htm>.
- 2 Download and install Oracle PIM Sync On Demand (the PIM Sync client). To download and use the PIM Sync client, you must have the Enable PIM Sync Access privilege in your user role. If you do not see the Oracle PIM Sync On Demand option available under Data & Integration Tools in My Setup, contact your company administrator. For more information, see [Installing and Uninstalling Oracle PIM Sync On Demand](#) (on page 644).
- 3 Configure the PIM Sync client settings, see [Configuring PIM Sync Client Synchronization Settings](#) (on page 645).
- 4 Define your PIM Sync client profile, see [Configuring PIM Sync Client Synchronization Settings](#) (on page 645).
- 5 Review how your synchronized data will be handled, see [Reviewing the Synchronization Results](#) (on page 652).
- 6 Perform your initial synchronization, see [Running the Initial Synchronization with Oracle PIM Sync On Demand](#) (on page 650).

Running the Initial Synchronization with Your PIM

There are three steps required in order to run the initial synchronization between Oracle CRM On Demand and your PIM application, you must do the following:

- 1 Installing Oracle PIM Sync On Demand (see [Installing and Uninstalling Oracle PIM Sync On Demand](#) (on page 644)).
- 2 [Configuring PIM Sync Client Synchronization Settings](#) (on page 645).

NOTE: You can create filters during this step.

3 Running the Initial Synchronization with Oracle PIM Sync On Demand (on page 650).

When synchronizing data, you can use filters to synchronize a subset of record, based on criteria you specify. For example, if you are planning to visit a particular region of the country and want to synchronize the contacts for the states you are visiting—or if you want to carry the contact information for only your high-profile customers—you would create filters to limit your records.

Before you begin:

- Connect to the Internet.
- Make sure your computer meets the system requirements specified for Oracle PIM Sync On Demand in Oracle CRM On Demand. For information on how to check the system requirements, see [Working with Other Applications](#) (on page 627).
- Select the filter within the PIM Sync client to exclude private data before your first synchronization; otherwise, the records will be marked private within Oracle CRM On Demand and deleted from your PIM application.
- If you are going to share a contact through different users within the application and then synchronize the contact's details with a mobile, make sure the Enable Sync of Team Contacts check box (located under Additional Information under Personal Preferences) is selected.
- If you are going to create a filter to exclude your private records from being added to Oracle CRM On Demand, make sure the Private check box (bottom right corner of record details) is selected for your personal tasks, appointments, and contacts in your PIM application.
- Since the data is mapped to specific fields in each application, make sure your data is set up properly in the appropriate fields. For example, if you include the Country in the State field in Outlook, it will not match the drop-down options in Oracle CRM On Demand and, therefore, will not be added to the record in Oracle CRM On Demand. In subsequent synchronizations, this type of mismatch will be treated as a conflict.
- Special characters, such as the trademark or euro symbols, might not be displayed correctly when synchronizing data between your PIM application and Oracle CRM On Demand.
- Make sure the time zone set in Oracle CRM On Demand corresponds to the time zone set in your PIM application. For information on setting your time zone in Oracle CRM On Demand, see [Updating Your Personal Details](#) (on page 604).

CAUTION: If you change your time zone (for example, if you set your computer clock to match another region's while you are traveling), be sure to close the PIM Sync client, and then reopen it. Closing and reopening the PIM Sync client allows Oracle CRM On Demand to synchronize the times set for your tasks and appointments accurately.

Installing and Uninstalling Oracle PIM Sync On Demand

To synchronize information between Oracle PIM Sync On Demand and a supported PIM application, you must install Oracle PIM Sync On Demand. This topic describes how to install and uninstall Oracle PIM Sync On Demand (the PIM Sync client).

NOTE: To install and run the PIM Sync client, ensure that you have administrator rights to install software on your computer. Installing Oracle PIM Sync On Demand remotely is not currently supported or certified by Oracle.

To install Oracle PIM Sync On Demand

- 1** Sign in to Oracle CRM On Demand.
- 2** Click the My Setup link at the top of any page.
- 3** On the Personal Homepage, click the Data & Integration Tools link.
- 4** On the Data & Integration Tools page, click the Oracle PIM Sync On Demand link.
- 5** On the Oracle PIM Sync On Demand page, read the information, and click Download Oracle PIM Sync On Demand.
- 6** On the second Oracle PIM Sync On Demand page, read the additional information, and click Download Oracle PIM Sync On Demand.
- 7** In the window, you can do one of the following:
 - Click Save to copy the file to your hard drive, which allows you to complete the installation later while you are offline. (Recommended).
 - Click Open to begin the installation. You must stay connected to the Internet to continue with the installation.
- 8** Extract the ZIP files.
- 9** Open the folder where you extracted the ZIP files, and click Setup.exe to start the Installation Wizard.
- 10** Follow the instructions to complete the installation.

NOTE: If you already have a version of Oracle PIM Sync On Demand installed on your computer, you must uninstall the previous version before installing a new one.

To uninstall Oracle PIM Sync On Demand

- From the Start menu, select All Programs, Oracle CRM On Demand, Oracle PIM Sync On Demand Uninstall.

Configuring PIM Sync Client Synchronization Settings

This topic describes how to configure the synchronization settings in Oracle PIM Sync On Demand, including how to create filters.

To configure the synchronization settings using the setup wizard

- 1 From the Start menu, select Oracle CRM On Demand, Oracle PIM Sync On Demand, and then Oracle PIM Sync On Demand.
- 2 In the Oracle PIM Sync On Demand window, click Setup.
- 3 In the Oracle PIM Sync On Demand window, enter the user login and password that you use to sign in to Oracle CRM On Demand, and click Application Setup.
- 4 In the Oracle PIM Sync On Demand Setup window, select the record types that you want to synchronize, and click Setup Wizard.

The Oracle PIM Sync On Demand Setup Wizard starts. You use this wizard to configure the Oracle PIM Sync On Demand for a selected record type, with the option to configure all record types.

- 5 In the Desktop Application window, select your PIM application type from the Available applications list, and click Next.
- 6 In the What to Sync window, select the information types that you want to synchronize, and click Next.
- 7 In the How to Sync window, select in which direction you want to synchronize data between Oracle CRM On Demand and your PIM application.

When using Oracle PIM Sync On Demand, you can configure the direction of data synchronization in two ways:

- **Two-way synchronization.** With this option data travels two ways: data in Oracle CRM On Demand is copied to your PIM application, and data that you have added, edited, or deleted in your PIM application is uploaded to Oracle CRM On Demand.
- **One-way synchronization.** With this option data travels only one way, and you can import or export data in one direction. Exports transfer data from Oracle CRM On Demand to your PIM application only. Imports transfer data only from your PIM application to Oracle CRM On Demand. If you want to replace all the data in the target application, select the check box, Replace All data in the Target Application. This option is available only for one-way synchronization.

NOTE: When you switch between two-way synchronization and one-way synchronization, the Synchronization Engine discards your previous synchronization history and executes a new synchronization. In this case, the Synchronization Engine uses the key fields to determine if a similar record in both the PIM application and in Oracle CRM On Demand is the same record. If any of the key fields do not match, the Synchronization Engine creates a new record in both the PIM application and in Oracle CRM On Demand. This new record contains the differences found during the new synchronization, which can result in duplicate records being created in either the PIM application or in Oracle CRM On Demand.

- 8 Click Next.
- 9 In the When to Sync window, select whether you want to synchronize data manually or automatically between Oracle CRM On Demand and your PIM application, and click Next.
- 10 In the Appointments Options window, select the user profile and date range for Oracle CRM On Demand that you want to use during the synchronization of appointment data, and click Next.

NOTE: It is recommended that you use the default setting, Transfer Only Future Items.

- 11 Select the appropriate settings that you want to use in the exchange of data with Oracle CRM On Demand.

NOTE: For more information on your login criteria, contact your company administrator.

- 12 Click Next and then Finish.

The following procedure describes how to configure the additional synchronization settings.

To configure the additional synchronization settings

- 1 In the Oracle PIM Sync On Demand window, enter the user login and password that you use to sign in to Oracle CRM On Demand, and click Application Setup.
- 2 In the Oracle PIM Sync On Demand Setup window, highlight the record type that you want to synchronize, and click Settings.
- 3 In the settings window, select the desktop application with which you want to synchronize, and click Advanced.
- 4 In the How to Sync tab, select the direction of data synchronization between Oracle CRM On Demand and your PIM application.
- 5 In the When to Sync tab, select whether you want to synchronize data automatically or manually between Oracle CRM On Demand and your PIM application.
- 6 In the information type tab (for example, the Appointments tab), select the following options:
 - a For the Confirmations option, select whether you want to display a confirmation dialog box showing the number of records that was deleted or changed or both.
 - b Select the Conflict resolution option, and how you want conflicts to be resolved.

A data conflict exists when two records contain the same values in key fields. For more information on these options, see [About Conflict Resolution with PIMs](#) (on page 653).
 - c Select the Filters option to restrict the scope of the data synchronized. Either keep the default option, None Selected, or create a new filter based on the mapped fields between Oracle CRM On Demand and your PIM application.

For more information on identifying matching records, see [About the Synchronization Engine and Field Mapping](#) (on page 640).

CAUTION: Selecting the Exclude Private Data filter can cause your private records to be deleted during subsequent synchronizations. To exclude your private records, create a new filter based on the Private field in Outlook.
 - d Select Folder mapping to identify which information types and folders that you want to synchronize. Click Map Folder to access the Mapping Setup window.
- 7 In the Oracle CRM On Demand tab, enter the access settings to synchronize data between Oracle CRM On Demand and your PIM application.
- 8 Click OK at any time to save your changes and return to the Settings window.

- 9 Click OK again to return to the initial setup window.
- 10 Repeat Step 2 through Step 9 for the each record type.
- 11 Click Close to exit the setup window.

The following procedure describes how to create a filter.

To create a filter

- 1 Navigate to the Oracle PIM Sync On Demand Configuration window:
 - a In the Oracle PIM Sync On Demand window, enter the user login and password that you use to sign in to Oracle CRM On Demand, and click Application Setup.
 - b In the Oracle PIM Sync On Demand Configuration window, highlight the information type that you want to synchronize, and click Settings.
 - c In the Settings window, select the PIM application that you want to synchronize with (for example, Microsoft Outlook), and click Advanced.
- 2 Click an information type tab, for example Contacts.
- 3 Select the Filters option.
- 4 Click New.
- 5 Enter a name for the filter (for example, Account Contacts Only).
- 6 Set up the conditions for the filter:
 - a Click the Field button, and select a category from the list (for example, Company Name).
 - b Select an operator (for example, Starts with).
 - c Enter the first value that you want to match, if necessary.

For example, if you set up a filter based on *Company Name*, with the condition *contains*, then enter the company name you want the filter to display first, such as *Oracle*.
 - d Click Add to List.
 - e (Optional) Repeat these steps to add more values or more conditions for this filter.
- 7 Set up the rules for the filter:
 - a Click the Rules tab.
 - b Select one of the following options:
 - All Conditions Must Be Met
 - One or More Conditions Must Be Met

- c Click OK.

The new filter that you set up is selected in the list.

- 8 (Optional) From the Filters list, select the check box, Delete from Oracle CRM On Demand Any Data That Does Not Match the Filter.

The Synchronization Engine ignores these records until the filter conditions are met, or the filter is removed or disabled. You can use this setting if duplicate records are generated during synchronization.

- 9 In the Advanced Settings window, click OK.

- 10 Click OK again to return to the initial setup window.

- 11 Click Close to exit the Setup window.

- 12 To use this filter and run the synchronization process now, click the Sync Now button.

If no filters are selected, then all records are synchronized. You can specify only one filter for each information type, but the filter can have multiple conditions.

NOTE: Filters are evaluated and applied to records from both your PIM application and Oracle CRM On Demand. Therefore, you can use only mapped fields for filtering, and only the records that meet your defined criteria are synchronized between the two applications.

About Administering Oracle PIM Sync On Demand

Company administrators can configure the following Oracle PIM Sync On Demand settings from the Company Profile page in Oracle CRM On Demand:

- Alternate PIM Sync Download URL
- Disable Access to PIM Sync Download Page
- Disable PIM Sync Extended Account Association
- Disable PIM Sync Account Association

For more information on these settings and the Company Profile page, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).

Defining when Synchronization Sessions Occur

You can specify that Oracle CRM On Demand performs synchronization sessions either automatically, or manually; that is, only when you click Sync.

To run automatic synchronization sessions

- 1 From the Start menu, select Oracle CRM On Demand, then Oracle PIM Sync On Demand.

- 2 In the Oracle PIM Sync On Demand window, click Setup.
- 3 Click Applications Setup.
- 4 In the Oracle PIM Sync On Demand Setup window, click Settings.
- 5 In the Settings window, click Advanced.
- 6 In the Advanced window, select the When to Sync tab.
- 7 Use the following information to complete your synchronization requirements:
 - **Synchronize times by minutes.** Select Every, and use the up and down arrows to select the time intervals. You can also manually type the required time intervals in the time fields. The default setting for this option is: Every 30 minutes.
 - **Synchronize times by day.** Select Every using the up and down arrows to specify the day, weekday, weekend day, week, and month. Select the up and down arrows to specify the time to synchronize for the interval.
- 8 Click OK.

NOTE: Some PIM applications require a user name and password. If a user name and password are not provided automatically, synchronization cannot run automatically.

The following procedure describes how to run synchronization sessions manually.

To run synchronization sessions manually

- 1 From the Start menu, select Oracle CRM On Demand, then Oracle PIM Sync On Demand.
- 2 In the Oracle PIM Sync On Demand window, click Setup.
- 3 Click Application Setup.
- 4 In the Oracle PIM Sync On Demand Setup window, click Settings.
- 5 In the Settings window, click Advanced.
- 6 In the Advanced window, select the When to sync tab.
- 7 Select Sync only when I click the Sync button.
- 8 Clear any automated synchronization options.
- 9 Click OK.

Running the Initial Synchronization with Oracle PIM Sync On Demand

This topic describes how to run the initial synchronization in Oracle PIM Sync On Demand.

To run the initial synchronization

- 1 From the Start menu, select Oracle CRM On Demand, Oracle PIM Sync On Demand, and then Oracle PIM Sync On Demand.
- 2 In the Oracle PIM Sync On Demand window, click Sync Now.

For each record type, a confirmation box appears, listing the changes made to records of that type. You can review the changes, cancel the synchronization, or accept the changes to complete the synchronization.

Changing the Synchronization Settings

You can change the settings before you synchronize your data. For example, if you find that the synchronization is taking a long time, you might want to reduce the set of data you synchronize during one session.

Before you begin. Connect to the Internet.

To change the synchronization settings

- 1 From the Start menu, select Oracle CRM On Demand, then Oracle PIM Sync On Demand.
- 2 In the Oracle PIM Sync On Demand window, click Setup.
- 3 To change your user login and password, type the new information in the Oracle PIM Sync On Demand window.
- 4 In the Oracle PIM Sync On Demand window, click Application Setup.
- 5 In the Oracle PIM Sync On Demand Configuration window, select the record type whose settings you want to change, and specify new options.

For more information, see [Running the Initial Synchronization with Your PIM](#) (on page 643).

- 6 In the Oracle PIM Sync On Demand window, click Save.

Running Additional Synchronization Sessions

You want to synchronize your records whenever you update, add, or delete contacts, tasks, or appointments. To do so, you need to be connected to the Internet, but you do not need to be signed in to Oracle CRM On Demand.

CAUTION: If you change your time zone (for example, if you set your computer clock to the time zone in another region while you are traveling), close Oracle PIM Sync On Demand (the PIM Sync client), and then reopen it. Closing and reopening the PIM Sync client allows the application to synchronize accurately the times that you set for your tasks and appointments.

Before you begin. Connect to the Internet.

To run additional synchronization sessions

- 1 From the Start menu, select Oracle CRM On Demand, Oracle PIM Sync On Demand, and then Oracle PIM Sync On Demand.
- 2 In the Oracle PIM Sync On Demand window, click Sync Now to synchronize the configured record types and applications.
The Sync Now button is disabled until a configuration is created.
- 3 Click the Close button.

When the synchronization is finished, a confirmation box appears for each record type, listing the changes to each record type. You can review and accept the changes, or cancel the synchronization.

Reviewing the Synchronization Results

When the synchronization is finished, you are prompted to confirm the results. You can also review the latest results by opening the log files when the synchronization is complete:

- One log file records errors, warnings, and high-level changes to Oracle CRM On Demand. This file is on the server and accessible through Oracle CRM On Demand.
- The other log files track the changes made to Microsoft Outlook or Lotus Notes on a detailed level. These files are saved to your computer.

The log files are overwritten each time a synchronization session is run, therefore they contain only data about the most current synchronization.

To review the synchronization results for Oracle CRM On Demand

- 1 Sign in to Oracle CRM On Demand.
- 2 Click the My Setup link at the top of any page.
- 3 On the Personal Homepage, click the Data & Integration Tools link.
- 4 On the Data & Integration Tools page, click the Oracle PIM Sync On Demand link.
- 5 On the Oracle PIM Sync On Demand page, click the View Sync Log link.
- 6 Save the file or open it directly.

The default filename is pim_sync_log.txt.

The following procedure describes how to review the synchronization results for Microsoft Outlook or Lotus Notes.

To review the synchronization results for Microsoft Outlook or Lotus Notes

- On your computer, open the following files:

- PTrace.log: C:\Documents and Settings\<window User>\Application Data\Siebel PIM Sync On Demand\Configurations
- PushSyncStatus.log: C:\Documents and Settings\<windows User>\Application Data\Siebel PIM Sync On Demand\Configurations
- Individual Sync Logs: C:\Documents and Settings\<windows user>\Application Data\Siebel PIM Sync OnDemand\Configurations\Conf_Intellisync XML_<Oracle CRM On Demand LOGIN ID>
 - pim_sync_log_Appointments.log
 - pim_sync_log_Contacts.log
 - pim_sync_log_ToDo's.log

About Conflict Resolution with PIMs

Conflicts occur on the field level when the same field in the same record has been updated in Oracle CRM On Demand and your PIM. For example, if an email address has been updated in Oracle CRM On Demand while you updated the same email address in your PIM, this conflict is recognized during the synchronization.

These are the options for resolving conflicts:

- Add all conflicting items

Add a new record to each system containing mapped values from the record in the other system. The original conflicting records remain intact.

Normally, when Add all conflicting items is selected, a data conflict causes a conflicting record to be added to each system. However, if a text field is changed in both systems, and the text in one field is a truncated version of the text in the other, the shorter text is overwritten by the longer text.
- Ignore all conflicting items

Let the conflict stand. No changes are made to either system.
- Notify me when conflicts occur (Default)

Receive notification when conflicts occur. The system displays a window with details about each conflict that it detects, and gives you options for resolving the conflict.
- Oracle CRM On Demand Wins

Use this option when you are confident that Oracle CRM On Demand contains the most current data.
- MS Outlook Wins or Lotus Notes Wins

Use this option when you are confident that your PIM contains the most current data.

If you accept the default setting for conflict resolution (notify me), you are prompted on how to handle each record conflict. When you resolve the conflict, the synchronization continues.

No messages appear during an automated synchronization. When an automated synchronization finishes the user is notified with a ToolTip displayed near the Oracle PIM Sync On Demand icon in the system tray.

NOTE: Overlapping appointments are not treated as data conflicts during synchronizations.

Adding Emails from Microsoft Outlook and Lotus Notes

Oracle Outlook Email Integration On Demand (the Outlook Email Integration client) and Oracle Notes Email Integration On Demand (the Notes Email Integration client) are modules that allow you to add emails from Microsoft Outlook and from Lotus Notes to Oracle CRM On Demand. Those emails become a history of all your account interactions, and are available to the entire sales team.

When you add emails to the application (either already received or outgoing emails), you can:

- Add the email as a task record (a completed activity) linked to Account, Contact, Lead, Opportunity, or Service records in Oracle CRM On Demand
- Add the email recipients as Contacts, Leads, Opportunities, or Service Requests to Oracle CRM On Demand
- Create follow-up tasks or appointments from the emails in Oracle CRM On Demand
- Update Oracle CRM On Demand records directly from Outlook or Notes, including new email addresses
- Search Oracle CRM On Demand to find addressee information (the Outlook Email Integration client only)

To use the Outlook Email Integration client or the Notes Email Integration client, install it on your laptop or desktop computer.

NOTE: To use the Outlook Email Integration client or the Notes Email Integration client, you must have the Outlook/Notes Email Integration Access privilege in your user role.

Installing Oracle Outlook Email Integration On Demand

To install the Outlook Email Integration client, you download and run a setup program that runs an InstallShield wizard. The wizard creates an Outlook plug-in that adds the following icons or labels to the Outlook toolbar:

- Add to CRM On Demand. This appears in the Inbox toolbar.
- Send & Add to CRM On Demand. This appears in the Message window toolbar.
- CRM On Demand Find. This icon appears in the Message window toolbar.

Before you begin the Outlook Email Integration client installation:

- Make sure your computer meets the system requirements specified for Oracle Outlook Email Integration On Demand in Oracle CRM On Demand. For information on how to check the system requirements, see [Working with Other Applications](#) (on page 627).
- If you are using Microsoft Outlook 2003, make sure Microsoft Word is not selected as your email editor. To verify that, click Tools in the Outlook menu bar and select Options. Under the Mail Format tab, clear the check box for this field: Use Microsoft Word to edit email messages.

To install the Outlook Email Integration client

- 1 Exit Microsoft Outlook, and close all its open windows.
- 2 Sign in to Oracle CRM On Demand.

- 3 Click the My Setup link at the top of any page.
- 4 On the Personal Homepage, click the Data & Integration Tools link.
- 5 On the Data & Integration Tools page, click the Oracle Outlook Email Integration On Demand link.
- 6 On the Oracle Outlook Email Integration On Demand page, read the information, and then click the Download Oracle Outlook Email Integration On Demand link.
- 7 On the second Oracle Outlook Email Integration On Demand page, read the additional information and click the Download Oracle Outlook Email Integration On Demand link.
- 8 In the window, you can:
 - Click Save to copy the Oracle_OEI_OnDemand.exe file to your hard drive to install while you are offline. (Recommended)
 - Click Run to begin the installation. You need to stay connected to the Internet to continue with the installation.
- 9 Follow the instructions to complete the installation.

Installing Oracle Notes Email Integration On Demand

Integrating Lotus Notes Email with Oracle CRM On Demand is a two-step process:

- Modifying the Lotus Notes Template
- Installing the Notes Email Integration client on the user's computer

Modifying the Lotus Notes Template

The Lotus Notes template is modified at the corporate level by your Lotus Notes administrator to expose the necessary code and UI elements that provide the interface with the Notes Email Integration client.

The following procedure describes how to download the Oracle Notes Email Integration On Demand files.

To download the Oracle Notes Email Integration On Demand files

- 1 Click the Training and Support link in the upper-right corner of any page, and sign in to My Oracle Support.

If you already have an Oracle.com account, you can sign in to My Oracle Support without registering. If you do not have an Oracle.com account, you must register as a new user.
- 2 In the My Oracle Support page, click the Downloads link, and then click the link to download the Oracle Notes Email Integration On Demand files for the appropriate version of Oracle CRM On Demand.

Installing the Notes Email Integration Client

To install the Notes Email Integration client, you run a setup program that runs an InstallShield wizard. The wizard installs and registers the Notes Email Integration client that adds the following buttons to the folder and memo views in Lotus Notes:

- Add to Oracle CRM On Demand. This button appears in the Inbox and Sent Items folder views.
- Send & Add to Oracle CRM On Demand. This button appears in the New Memo and Reply Memo views.

Before you begin the Notes Email Integration client installation:

- Notes Email Integration client uses a routing server to dynamically retrieve a user's instance URL. Ensure that you have a router set up to work with your Notes Email Integration client installation. For more information, contact Customer Care.
- Check with your Oracle CRM On Demand administrator to see if the Notes Email Integration client has been enabled at your company. Your company's Lotus Notes administrator must make modifications to your company's corporate Lotus Notes template to enable the Notes Email Integration client before it will work.

CAUTION: Do not attempt to install the Notes Email Integration client until you are sure that it has been enabled at your company. Doing so will require the Notes Email Integration client to be uninstalled and reinstalled before it will work.

- To download the installation package for the Notes Email Integration client, click the Training and Support link in the upper-right corner of any page to open the Training and Support Center page. On that page, click the Knowledge and Training link, and then sign in to My Oracle Support. In the My Oracle Support page, click the Downloads link, and then download the installation package.
- Make sure your computer meets the system requirements specified for Oracle Notes Email Integration On Demand in Oracle CRM On Demand. For information on how to check the system requirements, see [Working with Other Applications](#) (on page 627).

To install the Notes Email Integration client

- 1 Exit from Lotus Notes, and close all of its windows.
- 2 Obtain the Notes Email Integration client installation file from your Oracle CRM On Demand administrator, and save it to your desktop.
- 3 From your desktop, run the installation file, and then follow the instructions to complete the installation.

Uninstalling Oracle Outlook Email Integration On Demand or Oracle Notes Email Integration On Demand

You can uninstall Oracle Outlook Email Integration On Demand or Oracle Notes Email Integration On Demand at any time, using the Microsoft Windows Add/Remove Programs utility.

Adding Email Information to Oracle CRM On Demand

When adding email to Oracle CRM On Demand, the combined file size for the email and attachment cannot exceed 5 megabytes (MB). Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand do not support compressed files as attachments, for example, .zip, .rar, .7z, .cab and so on.

NOTE: When opening or creating emails in Outlook 2007, CRM On Demand buttons appear on the ribbon in the CRM On Demand Group on the Message tab.

To add email information

- 1** Highlight or open the email that you want to add to Oracle CRM On Demand.
- 2** In Microsoft Outlook, click Add to CRM On Demand. In Lotus Notes, click Add to Oracle.
- 3** In the Sign In window, enter the email address and password you normally use to access Oracle CRM On Demand.

NOTE: You only need to sign in one time for each Outlook or Notes session; you do not have to log in again until you close Outlook or Notes. Data that is sent to and from Oracle CRM On Demand from the Outlook Email Integration client or the Notes Email Integration client is always encrypted for security.

- 4** To automatically link emails during this session with the contact names in the To, Cc, and From fields, select Yes for Automatic Association.

When using Automatic Association, the application searches the emails in Oracle CRM On Demand and automatically adds this email as a completed task. If no match is found, the window appears for you to manually search and link the email to records.

- 5** Click the Sign In button.

The application searches records in Oracle CRM On Demand and displays the results in the Create a Task window, as described in the following table.

This area	Contains these records
Selected Records	<p>Initially, this area shows the contact records whose email addresses in Oracle CRM On Demand match the ones in the To, Cc, and From fields in the emails.</p> <p>You can move records from other areas in this window to the Selected Records. When you click Save in this window, the application saves the email to all the records in this area and to account records linked to them.</p> <p>NOTE: A contact must have a linked account record for this email to be saved to it.</p>
Email Recipients Not Found	This area shows the names appearing in the To or Cc fields in the email that cannot be mapped to existing contacts in Oracle CRM On Demand.
Related Records	This area shows the records in Oracle CRM On Demand that are linked to the contact records corresponding to the email recipients, for example, Opportunities.

- 6** From the Create a Task window, you can do the following:

To do this	Follow these steps
Add follow-up tasks or	1 In the Options After Saving area, select the

appointments to Oracle CRM On Demand	<p>Create a New Task or Create a New Appointment check box.</p> <p>2 Click Save.</p> <p>3 In the New Task or New Appointment form, update the information and save the record.</p>
Add a new opportunity or service request linked to an email recipient	<p>1 In the Selected Records area, right click on the email recipient name.</p> <p>2 Select Add New Opportunity to On Demand or Add New Service Request to On Demand.</p> <p>3 Update the information in the New Opportunity or New Service Request form.</p> <p>4 Click Save.</p>
Add the email recipient as a contact or lead	<p>1 In the Email Recipients Not Found area, right click on the email recipient name.</p> <p>2 Select Add to On Demand (for a new contact record) or Add New Lead to On Demand (for a new lead record).</p> <p>3 Update the information in the New Contact or New Lead form.</p> <p>4 Click Save.</p> <p>The email recipient's name moves to the Selected Records area in the window.</p>
Add this email as a completed task	<p>1 Make sure a record appears in the Selected Records area.</p> <p>2 Click Save.</p> <p>The email is saved as a completed task linked to each record in the Selected Records area along with accounts linked to those records. The default values shown in the Activity Details are used unless you update them.</p>
Link this email to another record	<p>1 In the Create a Task window, double-click on any found records to move them to the Selected Records area.</p> <p>2 (Optional) Update the default settings in the Activity Details area.</p>

	<p>3 Click Save.</p> <p>This email is saved as a task linked to the selected records with the values shown in the Activity Details area.</p>
Remove the record from the Selected Records area	<p>■ Double-click the record. It moves to the left side of the window so that it won't be linked to this email.</p>
Search Oracle CRM On Demand for additional contacts, accounts, opportunities, leads, or service requests	<p>1 In the Search drop-down list, select the record type.</p> <p>2 Enter the name for which you want to search.</p> <p>3 Click Submit.</p> <p>Records matching the name appear in the Search Results area.</p>
Update a record	<p>1 Right click on the record.</p> <p>2 Select Edit.</p> <p>3 Update the information in the Edit form.</p> <p>4 Click Save.</p>
Update an email address in Oracle CRM On Demand from this email	<p>1 In the Search Results area, right click on the record.</p> <p>2 Select Associate email address.</p> <p>3 In the Associate Contact with Recipient window, select the updated email address from the drop-down list.</p> <p>4 Click Save.</p> <p>The new email address appears in the contact record.</p>
View record information, such as the record name, email address, and related record names	<p>■ Move your mouse over the record and keep it there until the tool tip appears, showing this information.</p>

To send an email and add the email to Oracle CRM On Demand

- 1** In Microsoft Outlook, click New in the toolbar. In Lotus Notes, click the New Memo or Reply button.
- 2** (Optional) Add email recipients from the Oracle CRM On Demand Contacts records:

a In the Message window, enter a name in the CRM On Demand Find field.

b Press Enter.

A window displays the contacts found in Oracle CRM On Demand.

c Select one of these options: To, CC, or BCC.

d Click Select.

3 Enter additional information as you normally would for sending an email.

4 In Microsoft Outlook, click Send & Add to CRM On Demand. In Lotus Notes, click Send & Add to Oracle.

When you click Save in the window, the email is sent to the recipients you selected, and the email itself is saved according to the information in the Create a Task window.

Using Oracle CRM On Demand Integration for Office

Oracle CRM On Demand Integration for Office is comprised of the following downloadable template files:

- Mail Merge for Word
- Reports and Analysis for Excel
- Segmentation Wizard

These template files insert special toolbars into Microsoft Word and Microsoft Excel. Using these toolbars, you can manipulate Oracle CRM On Demand data in Microsoft Word or Excel to create direct mail, mass email, refreshable offline reports, and lists of contacts (called segments) for use in marketing campaigns.

The following sections describe how to use the Oracle CRM On Demand Integration for Office templates:

- [Using Mail Merge for Word](#) (on page 661). Describes the On Demand Integration toolbar in Microsoft Word, provides information about opening Mail Merge for Word templates properly, and explains how to create a direct mailing or mass email in Microsoft Word using data from Oracle CRM On Demand.
- [Using Reports and Analysis for Excel](#) (on page 665). Describes the On Demand Integration toolbar in Microsoft Excel, provides background information about creating reports using the Reports and Analysis for Excel template, and describes how to run existing reports and create new reports using the Reports and Analysis for Excel template.
- [Using Segmentation Wizard](#) (on page 669). Describes the Target Builder toolbar in Microsoft Excel, provides background information about segment types, and describes how to create, upload, and export segments.

NOTE: To use Oracle CRM On Demand Integration for Office, your administrator must have enabled Web Services in Oracle CRM On Demand.

NOTE: Networks that leverage authenticated proxies are not supported.

Using Mail Merge for Word

Using Mail Merge for Word, you can download your Oracle CRM On Demand data into Microsoft Word to create a direct mailing or mass email. Before doing so, you must set up your Mail Merge for Word templates.

Click a topic to see step-by-step procedures to do the following:

- [Downloading the Mail Merge for Word Template](#) (on page 662)
- [Creating Mail Merge for Word Templates](#) (on page 662)
- [Creating Direct Mailings or Mass Emails with Mail Merge for Word](#) (on page 663)

Related Topics

See the following topic for related information:

- [About the On Demand Integration Toolbar in Mail Merge for Word](#) (on page 661)

About the On Demand Integration Toolbar in Mail Merge for Word

Mail Merge for Word contains the On Demand Integration toolbar, which is used to create mail merges with Oracle CRM On Demand data.

NOTE: If you are using Microsoft Office 2007, the On Demand Integration toolbar is available in the Add-Ins tab. Click the Add-Ins tab to display all the On Demand Integration options.

The following table describes the options available in the On Demand Integration toolbar in Mail Merge for Word.

Toolbar Option	Description
1. Get On Demand Data	Allows you to sign in to Oracle CRM On Demand and download data to Microsoft Word. The options are: Contacts, Leads, Accounts, Opportunities, Service Requests, and Use Saved List. Choosing Use Saved List allows you to select an existing data source stored as a list on your machine.
2. Refine Recipients	Allows you to choose which recipients from the downloaded data you want to correspond with.
3. Refine Message	Contains the following options: <ul style="list-style-type: none"> ■ AutoText. Allows you to insert predetermined fields into the message. For example, you can insert a closing line into each message using the AutoText option. ■ Insert Oracle Field. Allows you to insert fields from the Oracle CRM On Demand record into the message. For example, you may choose to insert Full_Name into the greeting of each message.

Toolbar Option	Description
4. Preview	Allows you to preview each message. You can use the arrows to scroll through each one.
5. Print or Send Message	Allows you to merge the data into the template and print, merge into a separate Word document, or merge into individually addressed email messages and send them out.
6. Log as On Demand Activity	Allows you to create an activity in Oracle CRM On Demand as a record of the correspondence. This single activity is associated with each of the message's recipients. The text of the template sent is automatically inserted into the description of this activity.

Downloading the Mail Merge for Word Template

The Mail Merge for Word template adds the On Demand Integration toolbar to Microsoft Word. The following procedure describes how to download the template.

To download the Mail Merge for Word template

- 1 Click the Training and Support link at the top of Oracle CRM On Demand, and sign in to My Oracle Support.

If you already have an Oracle.com account, you can sign in to My Oracle Support without registering. If you do not have an Oracle.com account, you must register as a new user.
- 2 In the My Oracle Support Knowledge page, click the Downloads link, and then click the link to download Oracle Mail Merge for Word template.
- 3 Follow the instructions provided on the Web page to download the template.

Creating Mail Merge for Word Templates

The Mail Merge for Word toolbar (the On Demand Integration toolbar) is attached to each template file. The following procedure describes how to create a Mail Merge for Word template, using the On Demand Integration toolbar. Using the toolbar to create Mail Merge for Word templates allows you to make sure that your Oracle CRM On Demand data will support the personalization you are embedding in the template.

About Opening Mail Merge for Word Templates

To make sure that Mail Merge for Word is attached to any templates that you create or modify, you must always open the original template files. To make sure you have opened the original template file, check the title bar. The document title must have a .dot file name extension.

NOTE: Do not double-click the file to open it, because this action opens a new Word document, based on the template file. If you save any changes while in this mode, you will be saving a normal Word document, which does not have the On Demand Integration toolbar attached.

To create or modify Mail Merge for Word templates

- 1 Right-click the Mail Merge for Word template that you downloaded and saved locally, and select Open.
The file opens in Microsoft Word.

- 2 Create a typical correspondence using the On Demand Integration toolbar and Word functionality.
You can refine recipients, insert Oracle CRM On Demand fields, preview, and so on. For specific details about how to create a correspondence using the toolbar, see [Creating Direct Mailings or Mass Emails with Mail Merge for Word](#) (on page 663).

- 3 Before saving the template, unlink the data source from the template as follows:

- a Click the Main document setup button on the Microsoft Word Mail Merge toolbar.
- b In the Main Document Type dialog box, select the Normal Word document radio button.

NOTE: If the Microsoft Word Mail Merge toolbar is not visible, access it by clicking View, Toolbars, and then Mail Merge in the Word menu bar. If you are using Microsoft Office 2007, click the Mailings tab, then Start Mail Merge.

CAUTION: If you save and publish a template before disconnecting the data source, the file will attempt to connect to a data source on the local machine when it is used.

- 4 Do one of the following:
 - If you are saving a new template, select File, then Save As.
 - If you are saving changes to an existing template, select File, then Save.

Creating Direct Mailings or Mass Emails with Mail Merge for Word

Using Mail Merge for Word, you can download Oracle CRM On Demand data, and merge it with a Word document. The following procedure uses Contacts as an example, but you can also create mail merges using Oracle CRM On Demand data from Leads, Accounts, Opportunities, and Service Requests or using a recipient list you have saved locally.

NOTE: The maximum number of records that can be downloaded is 4000.

To create a direct mailing or mass email using Mail Merge for Word

- 1 Open the Word template file you want to use for your direct mailing.
- 2 In the On Demand Integration toolbar, click Get On Demand Data, then Contacts.

- 3** In the Oracle On Demand - Sign-in dialog box, complete the appropriate fields and click Sign In to sign in to Oracle CRM On Demand.
- 4** In the Define List dialog box, do the following:
 - a** In the Filters tab, define the criteria for the data you want to download into Word.
For more information about creating filters, see [Working with Lists](#) (on page 69).
 - b** In the Fields tab, select the specific fields of information you want to download. A maximum of 40 fields can be selected.

The system will scan the current template and automatically select each of the fields that are needed. You can select additional fields to insert into the template to further personalize the communication.

NOTE: You should also select additional fields of information that may be required to send the communication. For example, if you are going to be sending a mass email, you must include the email address in the recipient file.
 - c** Click OK.
- 5** In the Save List? dialog box, do one of the following:
 - a** To save the list locally for later use, click Yes. In the Save As dialog box, complete the appropriate fields, and then click Save.
 - b** If you plan on using the list only once, click No and then click OK. Selecting this option automatically saves the recipient list as a temporary file which will be deleted after use.
- 6** In the Mail Merge Recipients dialog box, you can do the following:
 - Clear check boxes to remove recipients from this correspondence.
 - Select check boxes to include recipients in this correspondence.

When you have finished editing recipients, click OK.

NOTE: You can reopen the Mail Merge Recipients dialog box by clicking Refine Recipients in the On Demand Integration toolbar.
- 7** Click Refine Message to insert Oracle CRM On Demand fields or auto-text into the Word document. For more information about the Refine Message button, see [Using Mail Merge for Word](#) (on page 661).
- 8** Click Preview and use the arrow buttons to scroll through each message to see how they will appear when printed or sent by email.

For more information about the Preview button, see [About the On Demand Integration Toolbar in Mail Merge for Word](#) (on page 661).
- 9** Click Print or Send Message and then do one of the following:
 - a** To send to another Word document, select Merge to Document.
 - b** To print, select Merge to Printer.

c To distribute as a mass email, select Send as Email.

d To distribute as a mass fax, select Send as Fax.

NOTE: To distribute correspondence as a mass fax, you must first configure Microsoft Office. For more information, search for "fax" in your Microsoft Office help files.

10 (Optional) Click Log as On Demand Activity to create a single Oracle CRM On Demand activity that will be associated with every contact selected for the mail merge. The Description field of the activity is automatically populated with the text of the template. In the Tasks dialog box, complete the appropriate fields, and then click Save.

Using Reports and Analysis for Excel

Using Reports and Analysis for Excel, you can download Oracle CRM On Demand data into Microsoft Excel, and work with it to create reports. This section includes the following topics:

- [About the On Demand Integration Toolbar in Reports and Analysis for Excel](#) (on page 665)
- [About Creating Reports with Reports and Analysis for Excel](#) (on page 666)
- [Downloading the Reports and Analysis for Excel Template](#) (on page 666)
- [Creating Reports Using Reports and Analysis for Excel](#) (on page 667)

About the On Demand Integration Toolbar in Reports and Analysis for Excel

Reports and Analysis for Excel contains the On Demand Integration toolbar, which you can use to create reports using data from Oracle CRM On Demand.

NOTE: If you are using Office 2007, the On Demand Integration toolbar is available in the Add-Ins tab. Click the Add-Ins tab to display all the On Demand Integration options.

The following table describes the On Demand Integration toolbar in Reports and Analysis for Excel.

Toolbar Option	Description
Configure On Demand Report	Allows you to sign in to Oracle CRM On Demand and download data to Excel.
Refresh On Demand Report	Updates data you are viewing in Excel with the most recent data available from Oracle CRM On Demand.

About Creating Reports with Reports and Analysis for Excel

Using Reports and Analysis for Excel, you can download Oracle CRM On Demand data and manipulate it in Microsoft Excel. When you click Configure On Demand Report on the On Demand Integration toolbar in Reports and Analysis for Excel, the Configure Reports dialog box appears. Using the Configure Reports dialog box, you can edit existing reports, create new reports, or remove existing reports. The following table describes the options available in the Configure Reports dialog box.

Button	Comments
Edit Report	Click to modify the filter settings and fields included in the selected report.
New Report	Click to create a custom report for the selected record type. You can set filter criteria against each of the standard and custom fields for that record type. For information about setting filter criteria in lists, see Working with Lists (on page 69).
Remove Report	Click to remove a report from the Excel workbook.
Run Report	Click to run the currently selected report. After running, the report is added as a new worksheet to the workbook.
Exit	Click to exit the Configure Reports dialog box.

Downloading the Reports and Analysis for Excel Template

The Reports and Analysis for Excel template adds the Oracle CRM On Demand Integration toolbar to Microsoft Excel. The following procedure describes how to download the template.

To download the Reports and Analysis for Excel template

- 1 Click the Training and Support link at the top of Oracle CRM On Demand.
- 2 Click the Support tab.
- 3 Click My Oracle Support Login.
- 4 Click Sign In and then enter your sign in credentials.
- 5 In the Search Knowledge Base field, enter 433624.1, and start the search.
- 6 Click the link for Oracle Reports and Analysis for Excel Template.
- 7 Follow the instructions provided on the Web page to download the template (ZIP file).

- 8 Decompress the ZIP file to a local directory.

Creating Reports Using Reports and Analysis for Excel

This section contains the following topics:

- Running Existing Reports
- Creating New Reports

Running Existing Reports

The following procedure describes how to run an existing report using Reports and Analysis for Excel. It also includes an optional step that describes how to edit an existing report. After running the report, you can work with the data in your workbook. You can build pivot tables, pivot charts, charts and graphs, and calculate fields from information included in your report worksheets.

NOTE: When adding pivot tables, pivot charts, and graphs and charts you should create them in new worksheets, otherwise when you refresh your reports they could be overwritten.

To run existing reports

- 1 Open the Excel template file.
- 2 In the On Demand Integration toolbar, click Configure On Demand Report.
- 3 In the CRM On Demand - Sign-in dialog box, complete the appropriate fields, and click Sign In to sign in to Oracle CRM On Demand.
- 4 In the Configure Reports dialog box, from the Select Record Type drop-down list, select the record type you want for your report. Choices are: Account, Contact, Opportunity, Lead, Service Request, or Solution.

The available reports for the selected record type appear in the Available Reports list. You can edit an existing report, remove an existing report, or create new reports. For more information about the Configure Reports dialog box, see [About Creating Reports with Reports and Analysis for Excel](#) (on page 666). For more information about creating new reports, see Creating New Reports in this topic.

- 5 Select an existing report from the Available Reports list.
- 6 (Optional) Click Edit Report to modify the filter settings and fields included with the currently selected report.

- a In the Define Report dialog box, in the Filters tab, define the criteria for the data you want to download.

For more information about creating filters, see [Working with Lists](#) (on page 69).

- b In the Fields tab, select the specific fields of information to be downloaded and then click OK.

NOTE: You can select up to 100 Fields for inclusion in a report.

7 Click Run Report.

The requested data is inserted into the Excel workbook as a new worksheet labeled with the report name.

8 Click Exit in the Configure Reports dialog box to begin editing the data in Excel.

9 Click Refresh On Demand Report to update the data that you are editing in Microsoft Excel with the most recent data from Oracle CRM On Demand.

NOTE: When you click Refresh On Demand Report, each report worksheet in the workbook is overwritten with the most recent information from Oracle CRM On Demand.

Creating New Reports

The following procedure describes how to create and run a new report using Reports and Analysis for Excel.

To create new reports

1 Open the Excel template file you want to use to create your report.

2 In the On Demand Integration toolbar, click Configure On Demand Report.

3 In the CRM On Demand - Sign-in dialog box, complete the appropriate fields, and click Sign In to sign in to Oracle CRM On Demand.

4 In the Configure Reports dialog box, from the Select Record Type drop-down list, select the record type you want to use for your report. Choices are: Account, Contact, Lead, Opportunity, Service Request, or Solution.

The available reports for the selected record type appear in the Available Reports list.

5 Click New Report to create your own query.

NOTE: Creating a new report allows you to create a custom report for a selected record type. You can set filter criteria against each of the standard and custom fields for that record type.

6 In the Define Report dialog box, do the following:

a In the Filters tab, define the criteria for the data you want to download.

For more information about creating filters, see [Working with Lists](#) (on page 69).

b In the Fields tab, select the specific fields of information to be downloaded and then click OK.

NOTE: You can select up to 100 Fields for inclusion in a report.

7 In the Save Reports dialog box, enter a name for this report in the Report Name field for future use, and then click Save.

8 In the Configure Reports dialog box, select the report you just created and click Run Report.

The report you created appears as a worksheet in Excel labeled with the name you indicated.

- 9 After adding all the reports you need, click Exit to close the Configure Reports dialog box and begin to work with the data in your worksheet.
- 10 Click Refresh On Demand Report to update the data that you are editing in Microsoft Excel with the most recent data from Oracle CRM On Demand.
Clicking Refresh On Demand Report updates every report worksheet in the workbook.

Using Segmentation Wizard

Using Segmentation Wizard, you can define contact segments, based on multiple record types. A segment is a list of contacts from Oracle CRM On Demand. This section includes the following topics:

- [About the Target Builder Toolbar in Segmentation Wizard](#) (on page 669)
- [About Segmentation Wizard](#) (on page 670)
- [Downloading Segmentation Wizard](#) (on page 670)
- [Creating Segments](#) (on page 671)
- [Uploading Segments](#) (on page 673)
- [Exporting Segments](#) (on page 674)

About the Target Builder Toolbar in Segmentation Wizard

Segmentation Wizard contains the Target Builder toolbar, which is used to create contact segments using data from Oracle CRM On Demand.

The following table describes the Target Builder toolbar in Segmentation Wizard.

Toolbar Option	Description
Manage Segments	Allows you to create and update segments using data from Oracle CRM On Demand, and to export segments as CSV files.
Refresh Segment	Updates the data that you are viewing in Microsoft Excel with the most recent data available from Oracle CRM On Demand.
Upload Segments	Uploads the list of segments from Segmentation Wizard to Oracle CRM On Demand.

About Segmentation Wizard

You can use Segmentation Wizard to generate contact segments (that is, lists of contacts) based on a combination of account, contact, opportunity, and service request fields in Oracle CRM On Demand. The resulting segments are multidimensional customer lists for targeting campaigns.

You can create the following segment types:

- **Dynamic segment.** Dynamic segments can be refreshed whenever necessary. When you refresh a dynamic segment, the filters saved with the segment are reapplied to the records in Oracle CRM On Demand, and the segment is updated to include new records. The new segment overwrites the previous segment.
- **Static segment.** Static segments are preserved as a snapshot. With a static segment, you can also manually select the contacts to include in the list. You cannot refresh a static segment.
- **External segment.** External segments are based on data from an external system or source. Segmentation Wizard finds Oracle CRM On Demand records that match the external list of data and returns linked contacts.

Additionally, Segmentation Wizard allows you to:

- Upload segments as campaign recipients to Oracle CRM On Demand
- Export segments as CSV files

Scenario for Using Segmentation Wizard

Your marketing team is planning to hold a marketing event in Germany for executives in the automotive sector. The event will allow executives at your company to assist in closing large, active opportunities before the end of the quarter.

To generate a segment to support this business need, you apply these filters:

- Contact Job Title is set to President.
- Account Location is set to Germany.
- Account Industry is set to Automotive.
- Opportunity Sales Stage is set to Negotiation Opportunity.
- Revenue is greater than €1,000,000.

The resulting segment is a list of contacts in Oracle CRM On Demand that meet all the criteria that you defined.

For example, to be included in the list, a contact record must (in addition to having the job title of President) be linked to account and opportunity records that meet the criteria for those record types.

Downloading Segmentation Wizard

Segmentation Wizard contains the Target Builder toolbar, which is used to create contact segments using data from Oracle CRM On Demand. The following procedure describes how to download Segmentation Wizard (an Excel file).

To download Segmentation Wizard

- 1 Click the Training and Support link at the top of Oracle CRM On Demand, and sign in to My Oracle Support.
If you already have an Oracle.com account, you can sign in to My Oracle Support without registering.
If you do not have an Oracle.com account, you must register as a new user before you sign in.
- 2 In the Support tab, click Add-On Applications.
- 3 In the Add-On Applications page, click Segmentation Wizard.
- 4 Follow the instructions provided on the Web page to download the file.
- 5 Save the file to a local directory.

Creating Segments

When you create a segment, you first specify the type of segment that you want to create. Then, you set up filters to define the segment, enter a name for the segment, and generate the segment from Oracle CRM On Demand records.

The following procedure describes how to create a segment.

Before you begin. Make sure the filter values that you enter match those in the records you want to include in your segment. For more information on filtering lists in Oracle CRM On Demand, see [Working with Lists](#) (on page 69).

NOTE: The Segmentation Wizard does not support multiselect picklist fields.

To create a segment

- 1 Open the Segmentation Wizard (Excel) template file.
- 2 In the Target Builder toolbar, click Manage Segments.
- 3 If prompted, select any options to enable macros.
- 4 If prompted, sign in using your Oracle CRM On Demand email address and password.
- 5 In the Manage Segments window, click New.
- 6 In the New Segment window, select the type of segment:
 - **Dynamic.** Allows you to save the criteria for the segment, and refresh the segment with the latest information from Oracle CRM On Demand.
 - **Static.** Allows you to initially filter a list of contacts, and then selectively choose which contacts to include in the segment.

- **External.** Allows you to use an external list of data (external CSV file) to retrieve a list of contacts from Oracle CRM On Demand. This segment type allows you to base your segments on a third-party file that you might have purchased or extracted from other internal data systems.

Segmentation Wizard generates the segment by matching records in Oracle CRM On Demand with the records in your CSV file. You can specify the fields that you want to use when matching records.

- 7 (Dynamic or Static segments types only) Set up the filters to apply to the different record types in the Set Segment Filters window.

NOTE: Filter values for numeric fields must be entered without using separators for thousands, and must use a period (.) as the decimal separator. For example, enter 1000.50 for one thousand and fifty cents in a U.S. currency field.

- a Click the tab corresponding to the record type for the first filter.

When setting filters on any record type, contacts that are linked to records meeting those criteria are included in the segment.

- b Select the Field, Condition, and Filter Value to define the first filter.

- c Repeat Step a and Step b until you have defined all your filters for this segment.

- d Click Save Segment.

- 8 (External segment types only) Set up the segment as follows:

- a In the External List window, specify the type of records that the external list contains, and specify if you want to apply additional contact filters.

- b In the Find External List window, select the CSV file.

- c In the External List window, select the fields that you want Segmentation Wizard to use to determine matches between the CSV file and the Oracle CRM On Demand fields, then map the fields from your CSV file to the corresponding Oracle CRM On Demand fields, and click Save.

- 9 In the Save Segment window, enter a name for the segment, and click Save.

Segmentation Wizard generates a contact list of records that meets all the criteria you set up. The list appears in a newly created worksheet with the label you used as your segment name.

NOTE: When Segmentation Wizard generates the segment, it returns only those records that you have access to in Oracle CRM On Demand.

- 10 (Optional, Static segments only) Select or clear contacts in the List Members window, and click Save.

The following procedure describes how to refresh a dynamic segment.

NOTE: When you refresh a dynamic segment, the segment is overwritten and cannot be restored.

To refresh a dynamic segment

- 1 Open the Segmentation Wizard (Excel) template file.

- 2 In the Target Builder toolbar, click Refresh Segment.
- 3 In the Refresh Dynamic Segments window, select the segment.
- 4 Click Refresh.

The following procedure describes how to update a dynamic or static segment.

To update a dynamic or static segment

- 1 Open the Segmentation Wizard (Excel) template file.
- 2 In the Target Builder toolbar, click Manage Segments.
- 3 Select the dynamic or static segment that you want to update.
- 4 Click Edit.
- 5 Do one of the following:
 - For Static Segments, select or clear contacts in the Select Segment Members window.
 - For Dynamic Segments, update the filters.
- 6 Click Save.

Segmentation Wizard generates the segment using the newly defined criteria.

Uploading Segments

You can upload the segments that you create in Segmentation Wizard to Oracle CRM On Demand. When you upload a segment, Oracle CRM On Demand links the contacts in the list to a campaign in Oracle CRM On Demand. The contacts appear in the Recipients section on the Campaign Detail page.

The following procedure describes how to upload a segment to Oracle CRM On Demand.

Before you begin. In Oracle CRM On Demand, create the campaign that you want to link to the segment.

To upload a segment

- 1 Open the Segmentation Wizard (Excel) template file.
- 2 In the Target Builder toolbar, click Upload Segments.
- 3 In the Upload Segments window:
 - a Select the segments that you want to upload.
 - b Select the campaign for this segment.

- c** Select the delivery status for the recipients that you are uploading.

The value that you select appears in the Delivery Status column in the Recipients section on the Campaign Detail page.

- d** Click Upload.

NOTE: You can upload a total of 10,000 recipients to a single campaign.

Exporting Segments

You can export a segment as a CSV file, which you can then distribute to third parties. The following procedure describes how to export segments.

To export a segment

- 1** Open the Segmentation Wizard (Excel) template file.
- 2** In the Target Builder toolbar, click Manage Segments.
- 3** In the Manage Segments window, select the segment that you want to export, and click Export.
- 4** Move the fields that you want to include to the Selected Fields area, arrange them in the order you want, and then click Export.
- 5** In the Save As window, name the file, and save it to the location that you want.

14 Reports

Use the Reports Homepage to create and display reports and charts about your business data. The Reports Homepage shows a catalog of the available reports. It provides a starting point for running, printing, and saving reports. If your role includes the Manage Custom Reports privilege, you can also create custom reports from this page and make them available to the employees at your company.

To change your visibility in relation to different records or different books, use the Book selector. For more information about visibility in relation to records and what records are available to you, see [About Visibility to Records in Analytics](#) (on page 676).

NOTE: Changes made to your Default Language, Currency, and Country fields on the Personal Profile pages are not reflected in all reports and analytics until you sign out and sign in again. Also, depending on your company's default language, you might see certain items in reports in a language other than your personal, default language. Even though any change made to your time zone is not reflected in reports, a different set of values is initialized for the session variables that depend on your time zone value when you log in next time.

Note for first-time users: Some reports are updated nightly, so you might not see data in reports for the first 24-hour period after signing in. For example, the Sales Effectiveness Reports does not show data until after that initial period.

There are two types of reports:

- **Custom reports.** Custom reports are those created by you or your coworkers. They are available in the Custom Reports and Analyses section of the Reports Homepage. You can access your previously created reports using the My Analysis link. You can access shared reports created by you and your coworkers using the Shared Custom Analysis link. For more information on accessing the existing custom reports, see [Setting Up Report Folders](#) (on page 688). To create your own custom report, click the Design Analysis link. For more information on creating your own custom report, see [Getting Started with Answers \(Custom Reports\)](#) (on page 698).
- **Prebuilt reports.** Prebuilt reports are provided with Oracle CRM On Demand. They are available in the Quick Lists, Pipeline Analysis, Sales Effectiveness, Customers, Service, and Marketing Effectiveness sections of the Reports Homepage. You cannot edit or delete the prebuilt reports. However, you can open, edit, and save these reports under different names. You can use them to form the basis of a new custom report. For more information about prebuilt reports, see [About Prebuilt Reports](#) (on page 682).

Related Topics

See the following topics for related information:

[About Visibility to Records in Analytics](#) (on page 676)

[About Prebuilt Reports](#) (on page 682)

[About Custom Fiscal Calendar in Oracle CRM On Demand Answers](#) (on page 686)

[Managing Reports](#) (on page 687)

[Getting Started with Answers \(Custom Reports\)](#) (on page 698)

[About Limitations in Reports](#) (on page 700)

[Dashboards](#) (on page 961)

[Optimizing Performance](#) (on page 954)

About Visibility to Records in Analytics

Several settings in Analytics control visibility. They are applied in the following order:

- 1 Access All Data in Analytics setting (in role privileges)
- 2 Reporting Subject Area setting in user profile
- 3 Historical Subject Area setting in user profile
- 4 Books and the Book selector
- 5 User Delegation
- 6 Role-Based Can Read All Records setting (in company and user profiles)

A company administrator using these settings can control what records appear on the reports that you run. For example, a manager can display the manager's own opportunities and the opportunities of employees who report to that manager, but a sales representative's settings limit the opportunities to only the opportunities that belong to the sales representative.

Access All Data in Analytics Setting

Users with the Access All Data in Analytics privilege in their role setups have complete visibility to all of the data in the entire organization, including records marked Private. This privilege is typically given to the company administrator. This privilege overrides any Analytics Visibility setting.

If the user role does not have the Access All Data in Analytics privilege, the Analytics Visibility setting specified in the company or user profile determines which data users can display in reports.

Reporting Subject Area Setting

This setting is generally used for all users in the organization who are not company administrators. This setting is available on both the company and user profiles. If this setting is not defined on a user's profile, then the company profile setting applies. This setting has the following values:

- **Manager Visibility.** Allows you to display your own data and all the data that is directly owned by your subordinates, including records marked Private

- **Team Visibility.** Allows you to display your own data and all the data that has been shared with you through the account and opportunity teams and through group assignment

Historical Subject Area

This setting is generally used for all users in the organization who are not company administrators. This setting is available on both the company and user profiles. If this setting is not defined on a user's profile, then the company profile setting applies.

This setting has the following possible values:

- **Manager Visibility.** Allows you to display your own data and all the data that is directly owned by your subordinates, including records marked Private
- **Team Visibility.** Allows you to display your own data and all the data that has been shared with you through the account and opportunity teams and through group assignment
- **Full Visibility.** Combines manager and team visibility to display data that is owned by you and your subordinates and data shared with you and your subordinates.

Books and the Book Selector

If you have the Full Visibility setting, the Books feature allows further control of which data displays in reports. Using the Book selector on the Reports pages, you can restrict the data to that contained in a book and its subbooks, if it has any. This feature is available only if you are assigned to one or more books and are using an Analytic (not Reporting) subject area. If you have the Access All Data in Analytics privilege, you continue to display all data no matter which book is selected. Also, Role-Based Can Read All Records visibility overrides Book visibility in Analytics.

A company administrator can set a default book for the Book selector on the Reports pages for each user. You specify this setting in the Default Book for Analytics field on the user profile.

Note: If the default book on your profile is set to a book that cannot contain data or is set to a book that you do not have access to, then you get an error indicating that access is denied.

User Delegation

The User Delegation feature allows further control of which data displays in reports. Using the Book selector, you can view data from any user who has added you to their Delegated User list. You can select the user's name from the Book selector to see report data for that user. You no longer display your own data in the report, but only the data of the selected user. However, your Analytics Visibility setting is still in effect. For example, if Ryan added you to his delegated user list, and his Analytics Visibility setting is Manager Visibility, you do not necessarily display the same data in the report that Ryan does unless Manager Visibility is also your setting.

Role-Based Can Read All Records Setting

This control is present in both the company profile and user profiles. This control determines whether Oracle CRM On Demand Answers takes into account a role's setting for Can Read All Records for record types. When this control is set to Yes in the company profile or set to Yes or Null in a user's profile, and also any record type has the Can Read All Records flag checked, then a user can display all records for that record type in

reports. When these conditions are not met, Oracle CRM On Demand Answers enforces the default visibility settings that are defined in the Reporting and Analytics subject areas.

If Role-Based Can Read All Records is enabled for a user, then Oracle CRM On Demand Answers ignores the visibility setting on the record types checked with Can Read All Records in the role definition. For other record types, Oracle CRM On Demand Answers enforces visibility, which is based on the default visibility settings for reporting and historical subject areas. For example, if Role-Based Can Read All Records is enabled for your profile, your visibility setting for the reporting subject areas is set to Manager Visibility, and Can Read All Records is set for Opportunity but not for Contact record types, then all opportunities are displayed when you run a report, but only for contacts owned by you and your subordinates.

Companies and company administrators must be aware of the following considerations when using the Role-Based Can Read All Records type setting in Analytics:

- Role-based record type visibility overrides Book visibility. When you select a book in the Book Selector with the role-based record type visibility enabled and the Can Read All Records setting defined on a record type for your role, all records for that record type are displayed, not just those contained in that book.
- Role-based record type visibility overrides the user hierarchy and user delegation aspects of visibility in Analytics. When you select a user in the Book Selector with role-based record type visibility enabled and the Can Read All Records setting defined on a record type for your role, all records of that record type are displayed, not just those that you expect to see for the selected user.
- In reports with two or more record types, the visibility to records is based on the record type with the most restrictive visibility control. For example, if the role-based record type visibility is enabled on the contact record type, but not on the opportunity record type and when both record types are on the report, Analytics shows only the opportunities the user has access to and their associated contacts.
- In historical subject areas, access to the employee record type is always based on the manager visibility. However, this restriction does not apply to real-time subject areas. The visibility of role-based record types does not affect this restriction.
- Access to user quota is always based on the manager visibility in both real time and in historical subject areas. Role-based record type visibility does not affect this behavior.

Security and Data Visibility in Analytic and Reporting Subject Areas

The data seen in reports is based on the security and data visibility defined for record types and the default visibility settings defined for the analytic and reporting subject areas. Most record types are secured in every subject area, but there are exceptions to this rule to support the reporting needs of associated record types even when these associated record types are not explicitly shared or owned by a user. For example, the account record type is secured only in subject areas where account is the primary driving record type but is unrestricted in the remaining subject areas.

The purpose for keeping a record type unrestricted in a subject area is that it allows you to report on the associations between record types. For example, in the Lead History subject area you can report on leads that are owned or shared by you and those leads' corresponding accounts even where those associated accounts are not owned or shared by you.

The following table details the visibility of record types in the analytic subject areas.

Record type	Subject Area	Manager Visibility	Team Visibility	Full Visibility
Account	Account Address	Secured	Secured	Secured
	Account Competitor History	Secured	Secured	Secured
	Account and Partner History	Secured	Secured	Secured
	Account and Related Account History	Secured	Secured	Secured
	Account Contact History	Secured	Secured	Secured
	Account History	Secured	Secured	Secured
	Account Team History	Secured based on team visibility	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Unrestricted	Unrestricted	Unrestricted
Account Competitor	All	Unrestricted	Unrestricted	Unrestricted
Account Partner	All	Unrestricted	Unrestricted	Unrestricted
Account Related Account	All	Unrestricted	Unrestricted	Unrestricted
Account Revenue	All	Secured	Unrestricted	Unrestricted
Activity	All	Secured	Secured	Secured
Asset	All	Secured based on the account record type	Secured based on the account record type	Secured based on the account record type
Call Activity	All	Secured	Secured	Secured
Campaign	All	Unrestricted	Unrestricted	Unrestricted
Contact	Contact Team History	Secured based on team visibility	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured	Secured
Contact Interests	All	Secured	Secured	Secured
Contact Revenue	All	Secured	Secured	Secured

Reports

Record type	Subject Area	Manager Visibility	Team Visibility	Full Visibility
Dealer	Dealer History	Secured	Secured	Secured
	Other subject areas	Unrestricted	Unrestricted	Unrestricted
Employee	All	Secured	Secured	Secured
Household	All	Secured	Secured	Secured
MedEd	All	Secured	Secured	Secured
Opportunity	All	Secured	Secured	Secured
Opportunity Competitor	All	Unrestricted	Unrestricted	Unrestricted
Opportunity Partner	All	Unrestricted	Unrestricted	Unrestricted
Partner	All	Secured	Secured	Secured
Portfolio	All	Secured	Secured	Secured
Product Revenue	All	Secured	Secured based on the opportunity record type of the product revenues	Secured based on the opportunity record type for manager visibility and based on the opportunity record type of the product revenues for team visibility
Quota	All	Secured based on manager visibility	Secured based on manager visibility	Secured based on manager visibility
Relationship Contact	All	Unrestricted	Unrestricted	Unrestricted
Service Request	All	Secured	Secured	Secured

The following table details the visibility of record types in the reporting subject areas.

Record type	Subject Area	Manager Visibility	Team Visibility
Account	Accounts	Secured	Secured
	Accounts and Competitors	Secured	Secured
	Accounts and Partners	Secured	Secured

Record type	Subject Area	Manager Visibility	Team Visibility
	Accounts and Related Accounts	Secured	Secured
	Custom Objects 1,2,3 and Accounts	Secured	Secured
	Other subject areas	Unrestricted	Unrestricted
Account Competitor	All	Unrestricted	Unrestricted
Account Partner	All	Unrestricted	Unrestricted
Account Related Account	All	Unrestricted	Unrestricted
Activity	Shared Activities	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured
Asset	All	Secured based on Account	Secured based on Account
Campaign	All	Unrestricted	Unrestricted
Contact	All	Secured	Secured
Custom Objects 1-15	All	Secured	Secured
Employee	All	Unrestricted	Unrestricted
Household	All	Secured	Secured
Lead	All	Secured	Secured
Opportunity	All	Secured	Secured
Opportunity Competitor	All	Unrestricted	Unrestricted
Opportunity Partner	All	Unrestricted	Unrestricted
Product Revenue	All	Secured	Secured based on the opportunity record type of the product revenues
Quota	All	Secured based on	Secured based on

Record type	Subject Area	Manager Visibility	Team Visibility
		manager visibility	manager visibility
Relationship Contact	All	Unrestricted	Unrestricted
Service Request	All	Secured	Secured

Notes:

1. Role-based record type visibility is enabled on all record types.
2. Book visibility in Oracle CRM On Demand Answers is enabled for the following record types: Account, Activity, Asset (Based on Account), Contact, Household, Lead, Opportunity, Product Revenue, Service Request, and Custom Objects 1 to 15. The Book visibility in reporting subject areas shows records in the current book, but in analytic subject areas it shows records contained in the subbooks as well.

About Prebuilt Reports

Oracle CRM On Demand provides a number of prebuilt reports. You cannot edit or delete prebuilt reports. However, you can open, edit, and save these reports under different names. You can use them to form the basis of a new custom report. These reports are on the Reports Homepage and are organized into the following sections:

- Quick Lists
- Pipeline Analysis
- Sales Effectiveness
- Customers
- Service
- Marketing Effectiveness
- Usage Tracking

Quick Lists

The following table lists the information.

Report Name	Description
Opportunities By Account	Displays a list of all of your opportunities by account
Opportunities By Sales Stage	Displays a list of all of your opportunities by sales stage

Report Name	Description
Activities By Opportunity	Creates and evaluates a list of all of your activities by opportunity
Accounts By Sales Rep	Displays a list of all of your accounts by sales representative
Contact Mailing List	Displays and prints a mailing list of all of your contacts by account
Employee List	Displays a full list of the users of Oracle CRM On Demand at your company

Pipeline Analysis

The following table lists the information.

Report Name	Description
Pipeline Analysis	Analyzes your pipeline to identify opportunities and challenges
Opportunity Revenue Analysis	Analyzes your opportunity revenue
Pipeline Quality Analysis	Evaluates the quality of your deals and identifies the most important deals that can be targeted and closed quickly
Team Pipeline Analysis	Analyzes your deals by team
Top 10 Opportunities	Views and analyzes the top ten deals
Historical Pipeline Analysis	Analyzes the pipeline on a historical basis to evaluate the current performance compared with past expectations
Historical Expected Revenue Quarterly Analysis	Compares the historical expected revenue with current revenue by quarter
Historical Opportunity Revenue Quarterly Analysis	Compares the historical opportunity revenue with current revenue by quarter
Quarterly Closed Revenue Analysis	Compares the closed revenue from the last quarter with the current revenue
Opportunity vs. Expected Revenue vs. Closed Revenue	Provides insight in one view of your quarterly revenue performance
Sales Stage History Analysis	Analyzes the pipeline activity and other metrics for the sales stage history

Sales Effectiveness

The following table lists the information.

Reports

Report Name	Description
Top Performers List	Views, analyzes, and identifies your top performers in the regions, industries, and so on
Quarterly Sales Effectiveness Analysis	Analyzes the sales effectiveness quarter-to-quarter by subordinate
Team Sales Effectiveness Analysis	Analyzes the sales effectiveness by team
Team Activity Analysis	Analyzes team activity to improve team productivity
Team Win Rate Analysis	Evaluates the effectiveness of the team win-rate
Team Average Sales Cycle Analysis	Analyzes the effectiveness of the average sales cycle of the team

Customers

The following table lists the information.

Report Name	Description
Number of Accounts Opportunity Analysis	Analyzes the total number of accounts with opportunities by different demographics
Number of Accounts Analysis	Analyzes the total number of accounts by different demographics
Contact Analysis by Opportunity	Analyzes the number of contacts with opportunities by multiple criteria
Contact Analysis by Account	Analyzes the total number of contacts by account criteria
Top 10 Customers	Views and analyzes your top ten accounts
Account Analysis	Analyzes your accounts and customers
Closed Revenue by Account Analysis	Analyzes the closed revenue by account demographics

Service

The following table lists the information.

Report Name	Description
Service Analysis	Identifies important service problems and tracks service trends in your area.
Service Report List	Reviews a list of the important service requests. This data is refreshed daily.

Report Name	Description
Current Service Request Aging Analysis	Analyzes and manages the aging of your service requests.
Open Service Request Analysis	Evaluates and analyzes your open service requests.
Number of Service Request Analysis	Evaluates and analyzes your total number of service requests.
Team Service Analysis	Analyzes service requests by team member.

Marketing Effectiveness

The following table lists the information.

Report Name	Description
Active Campaign Status	Analyzes the performance metrics for active campaigns.
Completed Campaign Results	Generates graphs and compares specific performance metrics for completed campaigns.
Campaign Effectiveness by Campaign Name	Evaluates selected performance metrics for completed campaigns.
Campaign Effectiveness by Campaign Type	Evaluates selected performance metrics by campaign type for completed campaigns.
Lead Followup Analysis	Analyzes the age, followup, and status trends for leads.
Lead Source Analysis	Analyzes volume trends for leads by lead source.
Opportunity Source Analysis by Close Date	Tracks the trend for lead sources for opportunities based on the closing date for the opportunity.
Opportunity Source Analysis by Create Date	Tracks the trend for lead sources for opportunities based on the creation date for the opportunity.
Projected Revenue	Estimates future closed revenue. The estimate is based on the past performance metrics.

Usage Tracking

The Usage Tracking reports are available to users who have the Usage Tracking privilege. The following table lists the information.

Report Name	Description
Application Object Usage Analysis	Analyzes record type usage in your application by calendar quarter of the selected year.

Report Name	Description
User Adoption Analysis	Analyzes user adoption of your application based on the user logins.
Setup and Configuration Overview	Displays a summary of application setup and configuration details for your company.
User Logins By Role	Displays and analyzes user logins by role by calendar year and month.
User Logins By Top 25 Users	Displays and analyzes your top user logins by calendar year and month.
Top 10 Page Views	Displays and analyzes the performance of the top 10 page views of your application.
Analytics Performance	Displays an analysis of the performance of your reporting and analytic queries and dashboards.

Report Metrics

The following metrics appear in some of the previous reports:

- **Avg Deal Size.** The average deal size based on the opportunity revenue, which is converted to the user's default currency.
- **Cost per Closed Sale.** The cost divided by the number of wins.
- **Cost per Lead.** The cost divided by the number of leads.
- **ROI (Return On Investment).** The Return On Investment ratio is calculated using the total opportunity revenue that is derived from the campaign (Gain) and the total actual cost of the campaign (Cost). The formula is (Gain minus Cost) divided by Cost.
- **Opportunity Win Rate.** The percentage of the opportunities won.

About Custom Fiscal Calendar in Oracle CRM On Demand Answers

Oracle CRM On Demand Answers supports multiple forms of calendar options:

- **Calendar Quarter.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. Each month is a whole month and starts and ends on the same date.
- **5-4-4 Model.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. The first month is 5 weeks long, and the second and third months are 4 weeks long.

- **4-4-5 Model.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. The first and second months are 4 weeks long, and the third month is 5 weeks long.
- **Custom Fiscal Calendar.** A fiscal calendar type with unique start and end dates for each year. It also allows a company to uniquely handle years that have a fifty-third week or leap week.

The date dimension is generated already for 20 years (2000 to 2020) for all calendar types except the custom fiscal calendar type. Hence, companies defined with calendar quarter, 4-4-5 or 5-4-4 calendar type can analyze their fiscal metrics for data with dates that fall within this range (2000 to 2020). Analyzing data by fiscal and calendar periods when accessed or joined through date dimensions that are outside this range is not possible.

For companies on a custom fiscal calendar, they can analyze the fiscal metrics through the date dimension only for the years defined in Oracle CRM On Demand. For example, if you define your fiscal calendar for the years 2000 to 2010, then you can analyze the fiscal metrics for these 11 years only. If a record is created or started or ended on a date that is outside this range, that record is still visible in Oracle CRM On Demand Answers reports as long as it is not accessed or joined through the date dimension table.

You must be familiar with the following considerations when your company is using a custom fiscal calendar:

- If your company changes the fiscal calendar type from a standard or regular fiscal calendar (calendar quarter, 4-4-5, 5-4-4 models) to a custom fiscal calendar, the change is not immediate. Your company must request a full ETL (Extract, Transform, and Load) for the change to be complete.
- If your company changes the fiscal calendar from a standard or regular fiscal calendar to a custom fiscal calendar, it is not possible to analyze the historical pipeline snapshots in Oracle CRM On Demand Answers for the fiscal years that were not defined in the custom fiscal calendar. Historical snapshots cannot be aligned with the new calendar definition.
- If your company changes the custom fiscal calendar definition for an existing year, this change is not reflected until a full ETL is performed.
- The custom fiscal calendar definition for new companies as well as calendar definitions of new fiscal years for existing companies are processed during the nightly refresh.
- The fiscal calendar code field in the date dimension can be used to decode the fiscal calendar definition for companies on a standard calendar or regular fiscal calendar. However, for companies using a custom fiscal calendar this code cannot be guaranteed to be consistent and therefore it cannot be reliably decoded.
- Companies that choose to use a custom fiscal calendar must enter fiscal calendar definitions, starting from the earliest year available and proceed sequentially without any gap in the fiscal year definitions. If you want to define calendar definitions for earlier years, you can do so, but you must request a full ETL.

Managing Reports

To manage reports, do the following tasks:

- [Setting Up Report Folders](#) (on page 688)
- [Setting Up User Visibility to Shared Report Folders](#) (on page 690)
- [Reviewing Report Data](#) (on page 692)
- [Printing Reports](#) (on page 692)

- [Running Reports](#) (on page 693)
- [Downloading Reports](#) (on page 695)
- [Deleting Reports](#) (on page 696)
- [Renaming Reports](#) (on page 697)
- [Copying and Moving Reports](#) (on page 697)

If your role includes the Manage Custom Reports privilege, you can perform these additional procedures:

- [Getting Started with Answers \(Custom Reports\)](#) (on page 698)
- [Making Custom Reports Public](#) (on page 911)

Related Topics

See the following topic for related information:

- [Reports](#) (on page 675)

Setting Up Report Folders

You can set up report folders and limit user visibility to those folders. After that, only users granted visibility to certain folders can display them on their Reports Homepage.

Setting up report folders consists of these general steps:

- 1 Create folders and subfolders (in Oracle CRM On Demand Answers).
- 2 Assign user visibility to folders (from the administration pages of Oracle CRM On Demand).
For more information about setting up user visibility, see [Setting Up User Visibility to Shared Report Folders](#) (on page 690).

- 3 Populate folders with reports (in Oracle CRM On Demand Answers).

Note: To perform this procedure, your user role must include the Manage Custom Reports privilege.

To create a report folder

- 1 In Oracle CRM On Demand, click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.
- 3 In Oracle CRM On Demand Answers, click Manage Analyses.
- 4 In the Manage Analyses window, select one of these options:
 - My Folders. This stores the new folder in your private folder directory.
 - Shared Folders. This stores the new folder in the company-wide shared folder.

5 If you want to create the folder as a subfolder of another folder, open the parent folder.

6 Click Create New Folder.

7 Enter the folder name and description.

NOTE: Restrict report folders names to 255 characters or less. Visibility cannot be configured for shared report folders with names greater than 255 characters.

8 Click Create Folder.

When a folder is created, it becomes visible on the Reports Homepage. All users with access to the Shared Custom Analyses folder can see the newly created Company Wide Shared folders. If needed, visibility to the shared folder may be restricted by linking user roles to it. If no user roles are linked to the folder, visibility remains public.

If a new folder is created in My Folders, it becomes visible in the My Analyses folder, which is available from the Reports tab of Oracle CRM On Demand. This folder contains private reports only. Other users cannot see them.

For more information, see [Setting Up User Visibility to Shared Report Folders](#) (on page 690).

To rename a folder

1 In the Manage Analyses window, in the folder row, click Rename.

2 Enter the new name.

3 (Recommended) Select Preserve references to old name of this item.

4 Click Update.

To delete a folder

■ In the Manage Analyses window, in the folder row, click Delete, and then confirm your action.

To populate a report folder with reports

■ Do one of the following:

■ Create the report, and then save it in the folder.

■ Copy or move an existing saved report from one folder to another.

For more information on copying and moving reports, see [Copying and Moving Reports](#) (on page 697).

Setting Up User Visibility to Shared Report Folders

By default, all user roles have visibility to each shared folder. You can override the default by manually linking specific roles to individual folders. However, if you manually link a user role to a folder, Oracle CRM On Demand revokes visibility for all other user roles (except the Administrator role) to that folder. You must continue to manually link each role that should have visibility.

If you link a role to a folder with subfolders, then the role is also linked to all its subfolders. To change this, navigate to the subfolder and make any needed changes.

The Administrator role has visibility to all folders at all times. Consequently, the Administrator role cannot be manually linked to or removed from a folder. Any custom role created by copying the Administrator role inherits this same visibility to all folders at all times, regardless of whether or not the role is manually linked to or unlinked from folders.

Before you begin. To perform this procedure, your role must include the Manage Content privilege.

To set up user visibility to a shared report folder

- 1** In the upper-right corner of any page in Oracle CRM On Demand (not Oracle CRM On Demand Answers), click the Admin global link.
- 2** On the Admin Homepage, in the Content Management section, click the Content Management link.
- 3** On the Content Management page, in the Report Folders section, click the Shared Custom Analyses link. The Folders List page displays all subfolders for the Shared Custom Analyses parent folder.
NOTE: All users have visibility to the Shared Custom Analyses root folder.
- 4** Select a folder, as follows:
 - If the folder where you want to set up visibility is a top-level folder, click the folder name.
 - If the folder where you want to set up visibility is a subfolder, click the Subfolders link for the parent folder until you reach the appropriate folder, then click the folder name.
- 5** To give certain roles visibility to the folder:
 - a** On the Folder Details page, click Add Roles.
 - b** Click the Lookup icon next to each field to link user roles.
 - c** Click Save.
- 6** To remove a role that was previously given visibility to the folder:
 - a** On the Folder Details page, in the record-level menu for the role, select Remove.
 - b** Confirm that you want to remove the role from the folder.
- 7** To remove a user role from having visibility to a report folder, click Remove.
- 8** Click Save.

TIP: When you set visibility for a subfolder, you can click the folder name in the Parent Folder field to return to the Folder Details page for the parent folder.

Sharing Private Reports

Visibility to the user's My Analyses private reports folder is restricted to the Oracle CRM On Demand session user only. The My Analyses folder contains reports created by the user and then stored as private. Users who have the Manage Custom Reports privilege can share Private reports with others by saving them in the Company Wide Shared Folder.

To share a private report

- 1 In Oracle CRM On Demand, click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.
- 3 In Oracle CRM On Demand Answers, click Open Analysis.
- 4 In the Open Analysis dialog box, navigate to the analysis, select it, and click OK.
- 5 In the Build and View Analysis page, click Save.
- 6 In the Save Analysis dialog box, select a destination folder (such as Company Wide Shared Folder) within the Shared Folders folder, and click OK.

About Sharing and Hiding Prebuilt Reports

Prebuilt reports are shared to all company users.

The Access Analytics Reports - View Prebuilt Analyses privilege controls whether or not shared prebuilt analyses are exposed to users for specific roles. If Access Analytics Reports - View Prebuilt Analyses is enabled for a user role, all shared prebuilt analyses appear on their Reports tab. If the privilege is not enabled for the user role, then all prebuilt analyses are hidden.

To hide specific shared prebuilt reports and display others, clear the Access Analytics Reports - View Prebuilt Analyses privilege. This hides all shared prebuilt reports. Then to share specific prebuilt reports, go to Oracle CRM On Demand Answers, open the report that you want to share, and save it in a shared folder within Company Wide Shared Folder. Configure the shared folder visibility as needed.

NOTE: The Access Analytics Reports - View Prebuilt Analyses privilege determines whether or not prebuilt reports display on the Reports Homepage. It has no effect on the other Homepages or prebuilt dashboards. Therefore, if the Access Analytics Reports - View Prebuilt Analyses privilege is selected, prebuilt reports appear on the Reports Homepage as well as on prebuilt dashboards and other Homepage pages. If not selected, prebuilt reports appear on the prebuilt dashboards and other Homepages, but not on the Reports Homepage.

Reviewing Report Data

Report data is shown in lists, tables, charts, or graphs. For many reports, you can select different categories to reorganize the same data from a different perspective. For example, you can display your accounts grouped first by region, and then change the selection to display the same data grouped by industry.

For lists and tables, null values appear as empty fields, except for the following:

- Id fields, such as Account Id, Contact Id, and so on where they appear as negative numbers
- Record type name fields, such as Account Name, Contact Full Name, Custom Object 1 Name, and so on where they appear as *Unspecified*

For charts and graphs, you can also drill down on each segment to see the records comprising that segment.

To compare relative and absolute numbers, many chart reports also show a table of supporting data metrics.

To change the perspective of the report

- From the drop-down list, select another category to reorganize the same data from a different perspective.

To view the records comprising a segment of the chart or graph

- On the chart, click a segment of the pie chart or bar graph.

A list appears of the underlying opportunities, accounts, or service requests contributing to that segment.

Printing Reports

You can print a report from the Reports Homepage or, if your role includes the Manage Custom Reports privilege, from Oracle CRM On Demand Answers.

TIP: Printing in landscape mode optimizes the appearance of a report.

To print a report from the Reports Homepage

- 1 In Oracle CRM On Demand, click the Reports tab.
- 2 On the Reports Homepage, click the link for the report that you want to print:
 - To print a prebuilt report, click the link for the report on the Reports Homepage.
 - To print a custom report, drill down on the My Analyses folder or the Shared Analyses folder, and click the link for the custom report.
- 3 Scroll to the bottom of the report page, click Printer Friendly, then select HTML or PDF, depending on the format that you want.

The report opens in a separate window.

- 4 In the report window, in the browser menu, select File, then Print.
- 5 In the print window, select your preferences, then print the report.
- 6 Close the report window.

To print a report from within Oracle CRM On Demand Answers

- 1 In Oracle CRM On Demand, click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.
- 3 On the Oracle CRM On Demand Answers page, click Open Analysis.
- 4 In the Open Analysis dialog box, locate and select the analysis you want to print and then click OK.
- 5 In the Build and View Analysis page, in the title bar, click Preview Analysis.
- 6 Scroll to the bottom of the report, click Printer Friendly, then select HTML or PDF.
The report opens in a separate window.
- 7 In the report window, in the browser menu, select File, then Print.
- 8 In the print window, select your preferences, then print the report.
- 9 Close the report window.

Running Reports

Although you can view reports on different pages in your application, the Reports Homepage provides a single point of access to all prebuilt reports and public custom reports.

To run a report

- 1 In Oracle CRM On Demand, click the Reports tab.

The Reports Homepage groups the reports under these categories:

Category	Description
Custom Reports and Analyses	All custom reports are created by users at your company. Reports released to some or all employees are Shared Custom Analyses, while private reports are My Analyses. Only users with roles that include the Manage Custom Reports privilege can create custom reports using the Design Analyses link.

Category	Description
Quick Lists	Reports used for standard list reporting rather than interactive or graphical analytics.
Pipeline Analysis	Reports to help you evaluate your company's sales and team effectiveness.
Sales Effectiveness	Reports to help you evaluate your company's historical and current pipeline trends and performance.
Customers	Reports to help you evaluate the quality and demographics of your accounts and contacts.
Service	Reports to evaluate the effectiveness of your service organization.
Communications	Reports to help you evaluate statistics regarding your Oracle Contact On Demand use, based on each workgroup and project. The Communications section appears if your user role has the privilege for viewing this dashboard.
Marketing Effectiveness	Reports to help you evaluate the effectiveness of your campaign and lead management activities.

- 2 On the Reports Homepage, click the link for the prebuilt report you want to run, or drill down into a folder to click on the link to a custom report you want to run.

The report information appears on the Reports page.

- 3 Depending on the specific report, you might be able to do the following on the Reports page:
 - To show the data from a different perspective, select other options from the drop-down lists.
 - To view exact totals for a segment in a chart or graph, place the pointer over the segment.
 - To view the records belonging to a segment, click the segment. The list of records appears with its specific data.
 - To filter on a reporting level, select an option from the Reporting Level drop-down list:

Reporting Level	Description
(All Choices)	A report that runs on data owned by any user whom the session user has visibility to in Oracle CRM On Demand Answers.
0	Report run on data owned by only the session user.
1	Report run on data owned by users 1 level beneath the session user in the organizational hierarchy, and all levels above the selected level.
2	Report run on data owned by users 2 levels beneath the session user in the organizational hierarchy, and all levels above the selected level.

- To download the report, scroll to the bottom of the report page, click Download, select the option you want, then follow the onscreen instructions to download the report.

- To refresh the report with current, real-time data (available for most, but not all reports), click the Refresh button at the bottom of the page.
- To print the report, click the Printer Friendly link at the bottom of the page.

Related Topics

See the following topics for related information:

- [Reports](#) (on page 675)
- [Reviewing Report Data](#) (on page 692)

Downloading Reports

You can download a report from the Reports Homepage or, if your role includes the Manage Custom Reports privilege, from Oracle CRM On Demand Answers.

To download a report from the Reports Homepage

- 1 Click the Reports tab.
- 2 On the Reports Homepage, click the link for the report you want to download.
- 3 Scroll to the bottom of the report page, click the Download link, and select one of the following options from the drop-down list:
 - Download to Microsoft Excel (for Excel 2002 or more recent)
 - Download to Excel 2000

NOTE: Downloading charts to Excel 2000 is not supported; only data can be downloaded.

 - Download Data (.csv)
 - Download Data (.txt)
 - Download Web Page (MHTML)
- 4 Follow the onscreen instructions to download the report.
- 5 Click Back to Reports Homepage to return to the Reports Homepage.

To download a report from Oracle CRM On Demand Answers

- 1 Click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses.
Oracle CRM On Demand Answers appears in a separate page, independent of the other Oracle CRM On Demand pages.

- 3 From the Open Existing Analysis section, click Open Analysis.
- 4 In the Open Analysis dialog box, locate and select the analysis you want to download and then click OK.
- 5 In the Build and View Analysis page, in the title bar, click Preview Analysis.
- 6 Scroll to the bottom of the report, click the Download link, and select one of the following options:
 - Download to Microsoft Excel (for Excel 2002 or more recent)
 - Download to Excel (2000)
 - Download Data (.csv)
 - Download Data (.txt)
 - Download Web Page (MHTML)
- 7 Follow the onscreen instructions to download the report.
- 8 Click Close Window in the upper-right corner of the report to return to the Oracle CRM On Demand Answers page.
- 9 Click Close Window on the Oracle CRM On Demand Answers page to return to the Reports Homepage.

Importing Your Downloaded Report

Within Excel, choose File then Open to import your downloaded report. If the data appears in a single column, select that column and choose Data then Text to Columns. In some versions of Excel, you can also double-click the downloaded file icon in Windows Explorer to import your downloaded report. For more information about compatibility with your version of Excel, contact your internal IT support team.

Deleting Reports

You can delete reports you have created. You cannot delete reports created by other users.

To delete reports that you have created

- 1 Click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses.
- 3 On the Oracle CRM On Demand Answers page, in the Manage Analyses section, click the Manage Analyses button.
- 4 In the Manage Analyses window, select the folder containing the report.
- 5 In the report row, click Delete, and then confirm the deletion by selecting Yes.
- 6 Click Getting Started at the top of the page to return to the Getting Started With Answers page.

Renaming Reports

You can rename reports you have created. You can only rename reports you have created, you cannot rename reports created by other users.

To rename reports that you have created

- 1 Click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses.
- 3 On the Oracle CRM On Demand Answers page, in the Manage Analyses section, click the Manage Analyses button.
- 4 In the Manage Analyses window, select the folder containing the report that you want to rename.
- 5 In the report row, click Rename.
- 6 Update the Name field.
- 7 If necessary, update the Description field (up to 2,000 characters).
If your report is a public one, the text for both the Name and Description fields is displayed on the employee's Reports Homepage exactly as you enter it.
- 8 Click Update.
- 9 Click Getting Started at the top of the page to return to the Getting Started With Answers page.

Copying and Moving Reports

You can copy a report from one folder to another in two ways:

- By opening the report in the Build and View Analysis page in Oracle CRM On Demand Answers and then saving the report to another folder.

NOTE: Use this method when you want to copy a report from My Folder to a shared folder.

- Using the Copy/Move feature in the Manage Analyses window in Oracle CRM On Demand Answers.

NOTE: Do not use this method to copy a report from My Folder to a shared folder.

You can also use the Copy/Move feature in the Manage Analyses window in Oracle CRM On Demand Answers to move a report from one folder to another.

The following procedure describes how to copy a report from My Folder to a shared folder.

To copy a report from My Folder to a shared folder

- 1 In Oracle CRM On Demand, click the Reports tab.

- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.
- 3 In Oracle CRM On Demand Answers, click Open Analysis.
- 4 In the Open Analysis dialog box, navigate to the report that you want to share, select it, and click OK.
- 5 In the Build and View Analysis page, click Save.
- 6 In the Save Analysis dialog box, navigate to the folder to which you want to copy or move the report.
- 7 Click OK.

The following procedure describes how to copy or move a report from one folder to another.

To copy or move a report from one folder to another through the Manage Analyses window

- 1 In Oracle CRM On Demand, click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.
- 3 In Oracle CRM On Demand Answers, click Manage Analyses.
- 4 In the Manage Analyses window, in the folder row, click Copy/Move.
- 5 In the report directory, select the folder to which you want to copy or move the report.
- 6 Click Copy or Move.

Getting Started with Answers (Custom Reports)

NOTE: To create custom reports your user role must include the Manage Custom Reports privilege or the Manage Personal Reports privilege.

The Getting Started with Answers page has links for the following actions:

- **Open Existing Analysis.** Click this link to open an existing analysis that is stored in your private folder or in the shared folder. For more information, see [Managing Reports](#) (on page 687).
- **Manage Analyses.** Click this link to delete or rename an existing analysis. For more information, see [Managing Reports](#) (on page 687).
- **Create New Analysis.** This section contains links to subject areas that form the basis of a custom report.

Creating a New Analysis (Custom Report)

The Create New Analysis section has two listings of subject areas that you can use in your report: the Analytics subject areas and the Reporting subject areas. Most reports use data from a single subject area. It is possible to create a report using data from two subject areas, but it is an advanced task.

Each subject area contains data fields (organized into dimensions) and their related metrics.

The Analytics subject areas use data that is compiled nightly. These subject areas generally have historical or trend data, or contain more complex calculations than those found in the Reports subject areas. Reports made from Analytics subject areas display the date and time of the last update at the bottom of the page. If this is the first time you sign in, the historical analyses do not show data during the first 24-hour period.

The Reporting subject areas provide real-time analyses. The data in these reports can change during the working day. Reports made from Reporting subject areas have a Refresh button, so you can update them in real time. For more information about subject areas, see [About Subject Areas in Reports](#) (on page 703).

Before you begin. Do the following:

- Make sure the data that you want to include is not already available in a prebuilt report.
- Be familiar with the limitations of reports and reporting record types. For more information, see [About Limitations in Reports](#) (on page 700).
- Review the information about custom reports. If you have added new fields, you can use those custom fields on a report. If you have changed the display names for fields, the new display names are used for the reports. However, if you rename record types, such as Accounts, the new names are not reflected in the reports.

NOTE: If you selected the option to add new picklist values when importing data, those new picklist values might not be displayed in the reports for 24 hours. Therefore, you might not be able to use the new picklist values as filters during that time period.

To create a custom report, click one of the Analytics or Reporting subject areas. Oracle CRM On Demand Answers then guides you through the process of setting up your custom report and performing a dynamic analysis. This process consists of these general steps:

- 1 [Step 1: Defining Criteria](#) (on page 834)
Set up columns and filters. Add filters to determine which data to include (optional but recommended). Filters restrict the data that is displayed, reducing the size of the data set and avoiding performance issues.
- 2 [Step 2: Creating Layouts](#) (on page 860)
Add charts or tables (optional) to include graphical or alternative representations of the data.
- 3 [Step 3: Defining Prompts \(Optional\)](#) (on page 906)
Add prompts that allow users to specify filter values when they run the report.
- 4 [Step 4: Reviewing Reports](#) (on page 911)
View the report results before you save it.

To begin creating a custom report

- 1 Click the Reports tab at the top of your page.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click the Design Analyses Link.
Oracle CRM On Demand Answers appears in a separate page, independent of the other Oracle CRM On Demand pages.

- 3 Click an Analytics subject area or a Reporting subject area.

About Limitations in Reports

The limitations of reports are listed in the following sections.

Custom Objects Reporting

Oracle CRM On Demand Answers provides comprehensive support for reporting custom objects. You can report on Custom Objects 1, 2, and 3 and their many-to-many relationship with accounts, contacts, opportunities, and service requests through specially dedicated subject areas. Use the Advanced Custom Objects subject area to report the relationship between Custom Objects 4-15 and other prebuilt objects including Custom Objects 1, 2, and 3. However, custom object reporting is currently supported only in real-time subject areas. It is not available in historical subject areas.

Description Text Limits

The Description text fields limit how much text can be printed in a report:

- If the character set uses single-byte characters, the first 2,000 characters appear if the total byte size is less than 4,000.
- If the character set uses multibyte characters, the first 1,000 characters appear if the total byte size is more than 2,000.

Maximum Number of Rows

The maximum number of records can appear as follows:

- **Table view.** For this view the maximum number of records that can appear is 10,000. This number also controls the number of rows that can be downloaded. However, it supports up to 65,000 rows when downloading CSV files or text files.
- **Pivot table view.** For this view the maximum number of records that can appear is 20,000, and the maximum number of populated cells (rows multiplied by columns) is 150,000. Excluded and hidden columns are not considered in this limit.
- **Drop-down lists.** The maximum number of values that can show in drop-down lists is 1,000. This number includes the drop-down lists in filter conditions and report and dashboard prompts.

Time Limit for Query Execution

Oracle CRM On Demand Answers provides optimal performance for queries and reports while balancing the performance of Oracle CRM On Demand. To minimize the negative effect of long-running queries or run-away queries on the overall performance of Oracle CRM On Demand Answers, a time limit has been enabled for both real-time and historical reports. Queries that exceed the time limit generate a Timeout Error message. The limits are typically 10 minutes for Reporting (real-time) subject areas and 180 minutes for Analytic (historical) subject areas, but some implementations have lower limits. For information on optimizing query execution time, see [About Report Performance](#) (on page 953) and [Optimizing Performance](#) (on page 954).

Multiselect Picklists

Multiselect picklist (MSPs) values are not supported in real-time reporting subject areas. They are supported in the historical subject areas for the following subject areas:

- Account
- Activity
- Contact
- Dealer
- Lead
- Opportunity
- Service Request

Column Filter Prompt in Combined Analyses

Column filter prompts provide general filtering of a column within a request. However, this column filter prompt is not available in combined analysis requests.

Book Visibility

When you select a book from the Book Selector in a historical subject area, it shows the records included in both the book and its subbooks. It is not possible to exclude records contained in subbooks in historical subject areas. Whereas in real-time reporting subject areas, it shows only the records associated with the current book, not the records associated with the subbooks.

Exchange Rates

If your company has more than one active currency, your company administrator must set up exchange rates for each currency. Changes made to exchange rates appear in reports after the nightly refresh of analytics data. A single exchange rate is determined for each month, and all transactions within the month use that rate.

Some record types have multiple date fields. Only one date field is used to determine the month's exchange rate. For asset currency conversions, the Purchase Date field determines the month used. For an opportunity, the Opportunity Close Date that is closest to the Exchange Rate Effective Date is used.

Localization Settings

If you change your default language, the reporting elements display in the newly selected language. However, the data in reports or dashboards depends on your company's default language regardless of your chosen language.

Date Support

Oracle CRM On Demand Answers supports date analysis of metrics through the date dimension for 20 years (2000 to 2020) for companies using calendar-quarter or standard, fiscal-calendar models. For companies using custom fiscal calendar, Oracle CRM On Demand Answers can support date analysis of metrics only for

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the years defined in Oracle CRM On Demand. If a record is created outside this period, you can still display this record as long as it is not analyzed through the date dimension.

Date dimensions are set up differently in analytic (historical) subject areas than in reporting (real-time) subject areas. In analytic subject areas there is only one date dimension (standard or canonical), and there might be one or multiple sets of metrics using different dates, so these metrics can be reported by any date within the desire range. In reporting subject areas, there are one or multiple date dimensions (role-playing) and only a single set of metrics, so these metrics can be analyzed using different date dimensions.

For example, consider the Opportunity History analytic subject area, which contains one date dimension (Close Date) and two sets of metrics. The default set of metrics, Opportunity Metrics, is based on the Close Date, but there is also another set of metrics, Opportunity Metrics by Open Date, to allow analysis of opportunities by an open date. However, the Opportunities Reporting subject area contains two date dimensions: Date Opened and Close Date, and one set of metrics (Opportunity Metrics). The advantage of using the date dimension of the analytic subject area is that it allows analysis of various related metrics for the entire period using any date within the desire range in a single report.

The following table summarizes the set up of the date dimensions between analytic and reporting subject areas.

Characteristic	Analytic Subject Areas	Reporting Subject Areas
Date dimensions	One	One or multiple
Sets of metrics	One or multiple	One

Time Support

All times shown in reports are given in the company's time zone, so that everyone using the report can view consistent data.

User Quotas

User quotas are available for reporting in the following subject areas: Activities, Activity History, Opportunities, Opportunity History, Opportunity-Products, and Opportunity-Product History. You must be familiar with the following considerations when reporting user quotas:

- The user quota relation with the fiscal year is based on the year in which the last period of the fiscal year ends. For example, if the fiscal year starts in July 2008, then the user quota values defined for the fiscal year period of July 2008 to June 2009 relate to the fiscal year 2009.
- If your company changes the fiscal calendar definition, then you must delete and recreate user quotas if the quarterly and yearly roll-up of quota values for users must match the user quotas for Oracle Contact On Demand and Oracle CRM On Demand Answers. However, the user quota relation with the fiscal year in Oracle CRM On Demand Answers is still based on the year in which the last period of the fiscal year ends.
- User quotas are defined for the quota name, date (month or higher), and user. They are not defined at the opportunity level. If you try to report quota metrics and opportunity metrics with the opportunity dimension field, you might encounter ODBC errors. You might also encounter ODBC errors when the user quota is reported at a level of the dimension object that is lower than the defined level or the available level. For example, user quotas are defined at the month level. If you try to report at the date level, you might encounter an ODBC error.

- User quota metrics are always generated using Manager visibility regardless of the user's visibility. Hence, it is not possible for users who are not company administrators to report user quotas along with opportunity metrics when their visibility is set to Team visibility.
- You might experience ODBC errors if you report user quota metrics with a nonconforming dimension. For example, user quota metrics are not defined at the opportunity dimension in the Opportunity History subject area, and hence, you might experience ODBC errors if you tried to report user quota and opportunity metrics along with the opportunity dimension fields.
- If you define more than one quota for a given year, the user quota values shown in reports is an aggregation of all quota types for that year. You must use the filter by metric feature if you want the report to show user quota values of selected quota types for that year. For example, if Service Quota and License Quota are two quota types for the fiscal year 2009, and you want only Service Quota to be displayed in reports when reporting opportunity revenue, then use the following filter-metric formula on the user quota value column:

```
FILTER("Quota Metric"."QUOTA VALUE" USING (Quota."QUOTA NAME" = 'Service Quota'))
```

Custom Objects 1, 2, and 3 Associations

You cannot report on the many-to-many association between Custom Objects 1, 2, and 3 with the following objects in Oracle CRM On Demand Answers:

- Activities
- Assets
- Leads
- Products

The many-to-many relationship is implemented only for Custom Objects 1, 2, and 3 and Account, Contact, Service Request, and Opportunity in Oracle CRM On Demand Answers. This many-to-many relationship is yet to be implemented between Custom Objects 1, 2, and 3 and Activities, Assets, Leads, and Products. However, customers can report on the one-to-many relationship between these objects and Custom Objects 1, 2, and 3, using the Advanced Custom Objects subject area.

About Subject Areas in Reports

The Getting Started with Answers page contains two categories of subject areas: Analytics and Reporting. The subject areas in the Analytics category generate reports that are historical and that show trend analyses, based on data that is refreshed nightly. The subject areas in the Reporting category provide up-to-the-second data analyses and real-time information.

Subject areas represent information pertinent to a particular area of the business, or the reporting and analysis needs of a particular audience. Subject area names correspond to the type of information that they contain, such as dimension objects (record types) and fact metrics, which the business users want to analyze. Subject area names organize and categorize this information in various folders.

Analytic Subject Areas

The following links provide detailed information on each subject area, including its business purpose, its relationship type (one-to-one, one-to-many, many-to-many, and so on), and a listing of the dimensions and metrics that are available:

- [Account Addresses](#) (see "[Account Addresses Analytic Subject Area](#)" on page 709)
- [Account and Competitor History](#) (see "[Account and Competitor History Analytic Subject Area](#)" on page 710)
- [Account and Partner History](#) (see "[Account and Partner History Analytic Subject Area](#)" on page 712)
- [Account and Related Account History](#) (see "[Account and Related Account History Analytic Subject Area](#)" on page 715)
- [Account Contact History](#) (see "[Account Contact History Analytic Subject Area](#)" on page 717)
- [Account History](#) (see "[Account History Analytic Subject Area](#)" on page 718)
- [Account Team History](#) (see "[Account Team History Analytic Subject Area](#)" on page 720)
- [Activity History](#) (see "[Activity History Analytic Subject Area](#)" on page 721)
- [Asset History](#) (see "[Asset History Analytic Subject Area](#)" on page 723)
- [Call Activity History](#) (see "[Call Activity History Analytic Subject Area](#)" on page 724)
- [Campaign History](#) (see "[Campaign History Analytic Subject Area](#)" on page 726)
- [Campaign Response History](#) (see "[Campaign Response History Analytic Subject Area](#)" on page 727)
- [Contact Addresses](#) (see "[Contact Addresses Analytic Subject Area](#)" on page 729)
- [Contact History](#) (see "[Contact History Analytic Subject Area](#)" on page 729)
- [Contact Interests History](#) (see "[Contact Interests History Analytics Subject Area](#)" on page 730)
- [Contact Revenue History](#) (see "[Contact Revenue History Analytic Subject Area](#)" on page 731)
- [Contact Team History](#) (see "[Contact Team History Analytic Subject Area](#)" on page 732)
- [Deal Registration History](#) (see "[Deal Registration History Analytic Subject Area](#)" on page 733) (Oracle CRM On Demand Partner Relationship Management Edition only)
- [Deal Registration Product Revenue History](#) (see "[Deal Registration Product Revenue History Analytic Subject Area](#)" on page 735) (Oracle CRM On Demand Partner Relationship Management Edition only)
- [Dealer History](#) (see "[Dealer History Analytic Subject Area](#)" on page 737) (Oracle CRM On Demand Automotive Edition only)
- [Household History](#) (see "[Household History Analytic Subject Area](#)" on page 738) (Oracle CRM On Demand Financial Services Edition only)
- [Lead History](#) (see "[Lead History Analytic Subject Area](#)" on page 740)
- [MDF Request History](#) (see "[MDF Request History Analytic Subject Area](#)" on page 742) (Oracle CRM On Demand Partner Relationship Management Edition only)
- [MedEd Event History](#) (see "[MedEd Event History Analytic Subject Area](#)" on page 744) (Oracle CRM On Demand Life Sciences Edition only)
- [Opportunity and Competitor History](#) (see "[Opportunity and Competitor History Analytic Subject Area](#)" on page 745)

- [Opportunity and Partner History](#) (see "[Opportunity and Partner History Analytic Subject Area](#)" on page 748)
- [Opportunity History](#) (see "[Opportunity History Analytic Subject Area](#)" on page 750)
- [Opportunity Product Revenue History](#) (see "[Opportunity Product Revenue History Analytic Subject Area](#)" on page 752)
- [Partner History](#) (see "[Partner History Analytic Subject Area](#)" on page 753) (Oracle CRM On Demand Partner Relationship Management Edition only)
- [Pipeline History](#) (see "[Pipeline History Analytic Subject Area](#)" on page 755)
- [Portfolio History](#) (see "[Portfolio History Analytic Subject Area](#)" on page 756) (Oracle CRM On Demand Financial Services Edition only)
- [Product History](#) (see "[Product History Analytic Subject Area](#)" on page 758)
- [Sales Stage History](#) (see "[Sales Stage History Analytic Subject Area](#)" on page 759)
- [Service Request History](#) (see "[Service Request History Analytic Subject Area](#)" on page 760)
- [Special Pricing Product History](#) (see "[Special Pricing Product History Analytic Subject Area](#)" on page 762)
- [Usage Tracking Analysis](#) (see "[Usage Tracking Analysis Analytic Subject Area](#)" on page 764)

Reporting Subject Areas

The following links provide detailed information on each subject area, including its business purpose, its relationship type (one-to-one, one-to-many, many-to-many, and so on), and a listing of the dimensions and metrics that are available:

- [Account Revenues](#) (see "[Account Revenues Reporting Subject Area](#)" on page 769)
- [Accounts](#) (see "[Accounts Reporting Subject Area](#)" on page 770)
- [Accounts and Competitors](#) (see "[Accounts and Competitors Reporting Subject Area](#)" on page 772)
- [Accounts and Partners](#) (see "[Accounts and Partners Reporting Subject Area](#)" on page 775)
- [Accounts and Related Accounts](#) (see "[Accounts and Related Accounts Reporting Subject Area](#)" on page 777)
- [Activities](#) (see "[Activities Reporting Subject Area](#)" on page 780)
- [Advanced Custom Objects](#) (see "[Advanced Custom Objects Reporting Subject Area](#)" on page 781)
- [Assets](#) (see "[Assets Reporting Subject Area](#)" on page 788)
- [Business Planning](#) (see "[Business Planning Reporting Subject Area](#)" on page 790)
- [Campaigns](#) (see "[Campaigns Reporting Subject Area](#)" on page 792)
- [Contact Relationships](#) (see "[Contact Relationships Reporting Subject Area](#)" on page 794)
- [Contacts](#) (see "[Contacts Reporting Subject Area](#)" on page 795)
- [Custom Object 1 and Accounts](#) (see "[Custom Objects and Accounts Reporting Subject Area](#)" on page 796)
- [Custom Object 1 and Contacts](#) (see "[Custom Objects and Contacts Reporting Subject Area](#)" on page 798)

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- [Custom Object 1 and Opportunities](#) (see "[Custom Objects and Opportunities Reporting Subject Area](#)" on page 800)
- [Custom Object 1 and Service Requests](#) (see "[Custom Objects and Service Requests Reporting Subject Area](#)" on page 802)
- [Custom Object 1s](#) (see "[Custom Objects Reporting Subject Area](#)" on page 803)
- [Custom Object 2 and Accounts](#) (see "[Custom Objects and Accounts Reporting Subject Area](#)" on page 796)
- [Custom Object 2 and Contacts](#) (see "[Custom Objects and Contacts Reporting Subject Area](#)" on page 798)
- [Custom Object 2 and Opportunities](#) (see "[Custom Objects and Opportunities Reporting Subject Area](#)" on page 800)
- [Custom Object 2 and Service Requests](#) (see "[Custom Objects and Service Requests Reporting Subject Area](#)" on page 802)
- [Custom Object 2s](#) (see "[Custom Objects Reporting Subject Area](#)" on page 803)
- [Custom Object 3 and Accounts](#) (see "[Custom Objects and Accounts Reporting Subject Area](#)" on page 796)
- [Custom Object 3 and Contacts](#) (see "[Custom Objects and Contacts Reporting Subject Area](#)" on page 798)
- [Custom Object 3 and Opportunities](#) (see "[Custom Objects and Opportunities Reporting Subject Area](#)" on page 800)
- [Custom Object 3 and Service Requests](#) (see "[Custom Objects and Service Requests Reporting Subject Area](#)" on page 802)
- [Custom Object 3s](#) (see "[Custom Objects Reporting Subject Area](#)" on page 803)
- [Forecasts](#) (see "[Forecasts Reporting Subject Area](#)" on page 805)
- [Households](#) (see "[Households Reporting Subject Area](#)" on page 810) (Oracle CRM On Demand Financial Services Edition only)
- [Leads](#) (see "[Leads Reporting Subject Area](#)" on page 813)
- [Opportunities Subject Area](#) (see "[Opportunities Reporting Subject Area](#)" on page 815)
- [Opportunities and Competitors](#) (see "[Opportunities and Competitors Reporting Subject Area](#)" on page 817)
- [Opportunities and Partners](#) (see "[Opportunities and Partners Reporting Subject Area](#)" on page 819)
- [Opportunity-Products](#) (see "[Opportunity Product Revenues Reporting Subject Area](#)" on page 821)
- [Opportunity Team](#) (see "[Opportunity Team Reporting Subject Area](#)" on page 822)
- [Partners](#) (see "[Partners Reporting Subject Area](#)" on page 823) (Oracle CRM On Demand Partner Relationship Management Edition only)
- [Personalized Content Delivery](#) (see "[Personalized Content Delivery Reporting Subject Area](#)" on page 825) (Oracle CRM On Demand Life Sciences Edition only)
- [Service Requests](#) (see "[Service Requests Reporting Subject Area](#)" on page 829)
- [Shared Activities](#) (see "[Shared Activities Reporting Subject Area](#)" on page 830)

The following table shows the five types of subject areas that Oracle CRM On Demand uses.

Subject Area Type	Description
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Subject Area Type	Description
Simple	<p>This subject area type consists of a single fact table that contains all the metrics of the driving record type. The report always provides a result that can be understood. In other words, whatever combination of attributes and metrics you select for your report, the report always returns a result that reflects the data in Oracle CRM On Demand.</p> <p>Simple subject areas are appropriate when you want to report on a single set of metrics. They allow you to drill down on the detail in transactional data.</p>
Multi-fact	<p>This subject area type consists of two or more fact tables at different dimensional levels. The fact tables are joined by conformed (shared) dimensions. Multi-fact allows you to perform combined fact analysis.</p> <p>Not all dimensions have a relationship with all the fact tables. For example, the quota metric table has a relationship only with the Owned By User, Quota, and the Date dimensions. These dimensions are also called conforming dimensions in dimensional-modeling terminology. In a multi-fact subject area, if you select attributes from a dimension and a metric from a fact, and they have no direct relationship with each other, then your report will not work correctly. In some cases, the metric field is empty, or an error appears in the report.</p> <p>Multi-fact subject areas are appropriate when you want to report on multiple, yet related, sets of metrics.</p>
Summary	<p>This subject area type consists of a single summarized fact table. It allows you to perform summary analysis of metrics using a key dimension. It is called <i>summary</i>, because it provides summary information for a specific dimension or record type in Oracle CRM On Demand analytics, such as the Account record type. From this subject area, you can obtain all the CRM functionality related metrics, such as sales revenue, service request, activity, and lead metrics.</p> <p>Summary subject areas are appropriate when you want summaries of metrics, using a key dimension, but without analyzing these metrics, using other dimensions.</p>
Many-to-Many (M:M)	<p>This subject area type represents both many-to-many and one-to-many relationships between two record types. It contains a fact table but it might also be a subject area without a fact table.</p> <p>The one-to-many relationship between Custom Object 1 and Account can also be reported from this subject area. However, if you want to report on the many-to-one relationship between Account and Custom Object 1, then do not use this subject area. The Custom Object 1 subject area, which is a simple design subject area, allows you to report on all of the many-to-one relationships between all the standard record types and Custom Object 1.</p> <p>The Many-to-Many subject areas are the only ones that you can use to report on the many-to-many and one-to-many relationships between record types.</p>
Federated	<p>This subject area type brings all the dimension and metric folders under a single subject area. It allows you to create reports on all record types and</p>

Subject Area Type	Description
	<p>their associated record types, and so there is no single driving record type in this subject area type. You can report on both one-to-many and many-to-one relationships between the new custom objects (Custom Object 4-Custom Object 12) and other record types, but not on many-to-many relationships.</p> <p>The Advanced Custom Objects subject area is the only one that belongs to this subject area type. It is also the only one that allows you to report on the relationship between Custom Object 4-Custom Object 15 with other standard objects, including Custom Object 1, 2, and 3. All types of relationships can be reported on, using this subject area, except the many-to-many relationship.</p>

The first four types of subject areas mentioned (Simple, Multi-Fact, Summary, and Many-to-Many) are standard subject areas. The fifth type of subject area is a federated subject area for new custom objects.

Standard Subject Areas

Standard subject areas are intended to report on the relationship among standard record types, including Custom Object 1, 2, and 3. Standard record types and Custom Objects 1, 2, and 3 can have the following relationships:

- One-to-many
- Many-to-one
- Many-to-many

Oracle CRM On Demand provides dedicated subject areas that allow the reporting of a many-to-one relationship between a standard record type and other record types. For example, the Opportunities subject area allows the reporting of an opportunity record type's relationship with other record types. Dedicated subject areas also allow the reporting of a many-to-many relationship between two record types. For example, the Opportunity and Partner History subject area allows the reporting of a many-to-many relationship between opportunity and partner record types.

Federated Subject Area

The Federated subject area type allows reporting of Custom Object 4 to Custom Object 15 with other standard objects, including Custom Object 1, 2, and 3. The Advanced Custom Objects subject area is an exclusive subject area of this type, included in this release, which unites the reporting of custom objects and their associated objects under a single subject area.

This approach provides more complete functionality in terms of record types and their related record types. The concept of a single driving record type is no longer applied. The lack of a driving record type means that you must always add a default metric to the report. Because a federated subject area does not have a single driving object, the report must always contain a metric in order to choose a relationship path among objects. In non-Federated subject areas you do not need to choose a metric because the relationship is defined already in the repository using an implicit fact metric.

The Advanced Custom Object subject area provides access to all of the related record type metrics. From this subject area, you can build a summary report for all the related metrics, including all the record types in Oracle CRM On Demand.

With the Advanced Custom Objects subject area, you can build reports that show the one-to-many and many-to-many relationships for all record types. In the many-to-many design, you must use the Account and Custom Object 1 subject area to report on the one-to-many relationship, and you must use the Custom Object 1s subject area to report on the one-to-many relationship between other record types and Custom Object 1. By using the Advanced Custom Object subject area, you can have access to both types of relationships. However, a many-to-many report is not available in this subject area.

The following table shows the subject area for the new custom objects.

Subject Area Name	Subject Area Type
Custom Object Subject Area	
Advanced Custom Objects	Advanced or Federated

Record Type Renaming in Analytics

Oracle provides record type renaming in analytics for all standard record types. Company administrators can rename record types in Oracle CRM On Demand. These new names are reflected in the analytics part of Oracle CRM On Demand. The renamed record types appear with their new names in subject areas, reports, and dashboards. For example, if a company administrator changes the account record type name to *Physician* in Oracle CRM On Demand, then the word *Account* is replaced in all of the answers and subject areas. So, the subject area *Account Address* becomes *Physician Address*. The subject area *Account Metrics* becomes *Physician Metrics*, and so on. However, record type renaming is currently not supported for report and dashboard names.

Row_ID and Object ID

For each record type in a subject area (such as account, activity, asset, and so on) the Row_ID field in the database is mapped to a field named <object> ID, for example, one of the following: Account ID, Lead ID, Service Request ID, and so on.

Account Addresses Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and addresses. In other subject areas, it is possible to report only the primary address of an account. However, this subject area allows the reporting of all addresses of an account as well as an address shared by multiple accounts. This subject area has no metrics.

Relationship Type

Many-to-many

Dimensions

This subject area offers the following dimensions:

- Account
- Address

Metrics

None

Usage Notes

None

Account and Competitor History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and competitor accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the competitor dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the competitors for an account. Because this subject area represents the many-to-many relationship between accounts and competitor accounts, accounts that do not have an association with at least one competitor account cannot be reported using this subject area. The complete attributes that define the competitor account relationship, and which are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account Competitor
- Relationship Contact
- Account
- Campaign
- Territory
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Number (#) of Accounts
 - Number (#) of Accounts with Opportunities
 - Number (#) of Activities
 - Number (#) of Contacts
 - Number (#) of Leads
 - Number (#) of Archived Leads
 - Number (#) of Qualified Leads
 - Number (#) of Rejected Leads
 - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
 - Number (#) of Leads Resulting in Lost Opportunity
 - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
 - Number (#) of SRs
 - Number (#) of Cancelled SRs
 - Number (#) of Closed SRs
 - Number (#) of Open SRs
 - Number (#) of Pending SRs
 - Number (#) of Opportunities
 - Number (#) of Wins

Reports

- Potential Revenue
- Potential Revenue (000)
- Average (Avg) Potential Revenue
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR
- Average (Avg) Minutes to Close SRs
- Average (Avg) Open SR Age (Minutes)
- Average (Avg) Days to Close Opportunity (Definition: The total number of days to close an opportunity divided by the number of wins.)
- Closed Revenue
- Closed Revenue (000)
- Average (Avg) Closed Revenue
- Revenue
- Revenue (000)
- Product Closed Revenue
- Average (Avg) Revenue
- Revenue
- Product Revenue (000)
- Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History
- Account and Partner History
- Account and Related Account History

Account and Partner History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and partner accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the partner dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the partners for an account. Because this subject area represents the many-to-many relationship between accounts and partner accounts, accounts that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account Partner
- Relationship Contact
- Account
- Campaign
- Territory
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Number (#) of Accounts
 - Number (#) of Accounts with Opportunities

- Number (#) of Activities
- Number (#) of Contacts
- Number (#) of Leads
- Number (#) of Archived Leads
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads
- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
- Number (#) of SRs
- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Number (#) of Opportunities
- Number (#) of Wins
- Potential Revenue
- Potential Revenue (000)
- Average (Avg) Potential Revenue
- Avg Open SR Age
- Avg Days to Close SR
- Avg Minutes to Close SRs
- Avg Open SR Age (Minutes)
- Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Closed Revenue
- Closed Revenue (000)
- Avg Closed Revenue
- Revenue
- Revenue (000)
- Product Closed Revenue
- Avg Revenue
- Revenue

- Product Revenue (000)
- Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History
- Account and Partner History
- Account and Related Account History

Account and Related Account History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and related accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the related account dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the related accounts for an account. Because this subject area represents the many-to-many relationship between accounts and related accounts, the accounts that do not have an association with at least one related account cannot be reported using this subject area. The complete attributes that define the related account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Related Account
- Relationship Contact
- Account
- Campaign
- Territory
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Number (#) of Accounts
 - Number (#) of Accounts with Opportunities
 - Number (#) of Activities
 - Number (#) of Contacts
 - Number (#) of Leads
 - Number (#) of Archived Leads
 - Number (#) of Qualified Leads
 - Number (#) of Rejected Leads
 - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
 - Number (#) of Leads Resulting in Lost Opportunity
 - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
 - Number (#) of SRs
 - Number (#) of Cancelled SRs
 - Number (#) of Closed SRs
 - Number (#) of Open SRs
 - Number (#) of Pending SRs
 - Number (#) of Opportunities
 - Number (#) of Wins

- Potential Revenue
- Potential Revenue (000)
- Average (Avg) Potential Revenue
- Avg Open SR Age
- Avg Days to Close SR
- Avg Minutes to Close SRs
- Avg Open SR Age (Minutes)
- Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Closed Revenue
- Closed Revenue (000)
- Avg Closed Revenue
- Revenue
- Revenue (000)
- Product Closed Revenue
- Avg Revenue
- Revenue
- Product Revenue (000)
- Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History
- Account and Partner History
- Account and Related Account History

Account Contact History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and contacts. You can use it to report on all contacts associated with an account or a contact that is shared by multiple accounts. You cannot use this subject area to report on accounts that are not associated with any contact, or to report on contacts that are not linked to an account. This subject area has no metrics.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Contact

Metrics

None

Usage Notes

None

Account History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides a summary view of a company's important operating metrics for its accounts. The account record type is the record type that you want to analyze. You can use the account record type to answer questions about account performance: Which companies have the highest number of service requests? Which companies have the largest number of opportunities? This subject area allows you to group and roll up these metrics at any level by account, account territory, and date dimensions. A deeper analysis involving other business areas requires the use of other subject areas.

Relationship Type

Summary

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Territory
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Number (#) of Accounts
 - Number (#) of Accounts with Opportunities
 - Number (#) of Activities
 - Number (#) of Contacts
 - Number (#) of Leads
 - Number (#) of Archived Leads
 - Number (#) of Qualified Leads
 - Number (#) of Rejected Leads
 - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
 - Number (#) of Leads Resulting in Lost Opportunity
 - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
 - Number (#) of SRs
 - Number (#) of Cancelled SRs
 - Number (#) of Closed SRs
 - Number (#) of Open SRs
 - Number (#) of Pending SRs
 - Number (#) of Opportunities
 - Number (#) of Wins
 - Potential Revenue
 - Potential Revenue (000)

Reports

- Average (Avg) Potential Revenue
- Avg Open SR Age
- Avg Days to Close SR
- Avg Minutes to Close SRs
- Avg Open SR Age (Minutes)
- Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Closed Revenue
- Closed Revenue (000)
- Avg Closed Revenue
- Revenue
- Revenue (000)
- Product Closed Revenue
- Avg Revenue
- Revenue
- Product Revenue (000)
- Product Closed Revenue (000)

Usage Notes

None

Account Team History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and team users. Because it is possible to associate an account with various team members in Oracle CRM On Demand, you can use this subject area to create a list all team members associated with an account or all accounts where a user is added as a team member. You cannot use this subject area to report on accounts not associated with any user or to report on users not linked to an account. This subject area has no metrics.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Team Member

Metrics

None

Usage Notes

None

Activity History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze a broad set of activity metrics by activity, account, opportunity, lead, campaign, contact, service request, and date dimensions. Because this subject area represents every single activity event and interaction in connection with these record types, this subject area is at the lowest possible level, which means the activity fact table that determines this subject area might be the largest. This subject area allows you to roll up and analyze activity metrics using the broadest set of dimensions. This subject area consists of two or more fact tables, which allows the reporting of user quotas in relation to activity metrics.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Date
- Dealer

Reports

- Lead
- MedEd Event
- Opportunity
- Owned By User
- Quota
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Activity Metrics
 - Activity Custom Metrics
 - Activity Metrics by Created Date
 - Number (#) of Activities (Created Date)
 - Number (#) of Appointments (Created Date)
 - Number (#) of Closed Activities (Created Date)
 - Number (#) of Open Activities (Created Date)
 - Number (#) of Tasks (Created Date)
 - Activity Metrics by Other Dates
 - Number (#) of Appointments (End Date)
 - Number (#) of Appointments (Start Date)
 - Number (#) of Tasks (Due Date)
 - Number (#) of Accounts with Activities
 - Number (#) of Activities
 - Number (#) of Appointments Scheduled
 - Number (#) of Calls Dialed
 - Number (#) of Calls Reached
 - Number (#) of Closed Activities
 - Number (#) of Open Activities
- Quota Metrics
 - Quota Value

Usage Notes

None

Asset History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze asset metrics by account, asset, and product dimensions. It allows you to track assets and products sold to a customer or company. This subject area is one of the rare subject areas where the visibility to asset records is based on the visibility of the associated account records.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Asset
- Date
- Product Category
- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Asset Metrics
 - Asset Metrics by Purchase Date
 - Number (#) of Assets
 - Purchase Price
 - Quantity
 - Average (Avg) Purchase Price
 - Avg Quantity
 - Asset Metrics by Ship Date
 - Number (#) of Assets
 - Purchase Price
 - Quantity

- Avg Purchase Price
- Avg Quantity
- Number (#) of Assets
- Purchase Price
- Quantity
- Avg Purchase Price
- Avg Quantity

Usage Notes

None

Call Activity History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Call Activity History subject area enables sales managers and sales representatives to analyze call activity data by account, contact, activity, owner, product, product category, and date. Unlike the Activity History subject area, the Call Activity History subject area's metrics are based on the Life Sciences record types related to the activity including: Products Detailed, Samples Dropped, and Promotional Items Dropped. This means that activities that do not have records for one or more of these related child record types cannot be reported on using this subject area. The metrics in this subject area include the following:

- Number (#) of Calls
- Number (#) of Calls with Samples Dropped
- Number (#) Calls with Promotional Items Dropped

You can use the Product Category dimension to summarize call activity metrics for different levels of a product hierarchy, such as brand, submarket, and market.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account

- Contact
- Call Activity
- Campaign
- Opportunity
- Product Category
- Product
- Owned By User
- Products Detailed
- Samples Dropped

Metrics

The complete list of metrics for this subject area is as follows:

- Call Activity Metrics
 - Products Detailed Custom Metrics
 - Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Currency
 - Avg Indexed Number
 - Samples Dropped Custom Metrics
 - Indexed Currency
 - Indexed Number
 - Avg Indexed Currency
 - Avg Indexed Number
- Number (#) of Accounts
- Number (#) of Call Details by Product
- Number (#) of Call Products Detailed
- Number (#) of Calls
- Number (#) of Calls with Promotional Items Dropped
- Number (#) of Calls with Samples Dropped
- Number (#) of Contacts
- Number (#) of Promotional Items Dropped
- Number (#) of Samples Dropped

Usage Notes

None

Campaign History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables the comprehensive analysis of campaigns by campaign, user, and date dimensions. It allows you to analyze campaign results, performance, and the return on investment (ROI). It also contains metrics to help resolve problems in achieving campaign goals and optimizing future campaigns.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Campaigns
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Metrics
 - Number (#) of Campaigns
 - Number (#) of Campaigns Active
 - Number (#) of Campaigns Completed
 - Number (#) of Campaigns Planned
 - Number (#) of Leads
 - Number (#) of Opportunities
 - Number (#) of Wins
 - Number (#) of Accounts for Campaign
 - Number (#) of Contacts for Campaign

- Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)
- Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)
- Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 10, then divided by the revenue target.)
- Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Avg Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads converted to opportunities.)
- Cost per Closed Sale (Definition: The cost divided by the number of wins.)
- Avg Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)
- Cost per Lead (Definition: The cost divided by the number of leads.)
- Avg Cost Per Lead (Definition: The average cost divided by the number of leads.)
- Lead Conversion Rate (Definition: The leads who became customers, expressed as a percentage.)
- Revenue
- Closed Revenue
- Avg Closed Revenue
- Opportunity Win Rate (Definition: The total number of win opportunities, divided by the total number of won and lost opportunities.)
- Return on investment (ROI)

Usage Notes

None

Campaign Response History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the campaign response data. It complements the campaign subject areas, which provide the campaign performance data. It allows companies to analyze the response to a campaign by answering the following questions: How many people received the campaign? How many of them responded? How did they respond? How long did it take them to respond? and so on.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Campaign Recipient
- Campaign Response
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Metrics
 - Number (#) of Recipients
 - Number (#) of Hard Bounces
 - Number (#) of Soft Bounces
 - Number (#) of Responders
 - Number (#) of Responses
 - Number (#) of Open Responses
 - Number (#) of Click Through
 - Number (#) of Opt Ins
 - Number (#) of Opt Outs
 - Number (#) of Global Opt Ins
 - Number (#) of Global Opt Outs
 - Average (Avg) Days to Respond

Usage Notes

None

Contact Addresses Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between contacts and addresses. In other subject areas, it is possible to report on only the primary address of a contact. However, this subject area allows you to report on all addresses of a contact as well as an address that is shared by multiple contacts. This subject area does not have any fact tables or any metrics.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Contact
- Address

Metrics

None

Usage Notes

None

Contact History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

You can use this subject area to report on contact metrics by contact, account, campaign, owned by user, and date dimensions. The level of detail of this subject area is one row for each contact created in Oracle CRM On Demand. This subject area allows you to quickly answer the following questions: Who are the top ten

employees with the largest number of contacts? Which accounts do not have any contacts? Which are the largest campaigns by contacts? How many prospects does a particular contact bring to my company?

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Contact
- Date
- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Metrics
 - Number (#) of Clients
 - Number (#) of Contacts
 - Number (#) of Prospects

Usage Notes

None

Contact Interests History Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Interests History Analytics subject area enables you to generate reports about contacts' interests for the Contact dimension. This report enables advisors and their managers to determine their clients' interests and hobbies and to select meaningful gifts for their clients, which are based on those interests. They can also use this information to host relevant appreciation events, such as golf tournaments. In this way,

advisors can deepen their relationships with their clients as well as meet their clients' friends and families. These events might generate new business.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Contact
- Owned By User
- Date
- Contact Interests

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Interests Metrics
 - Number (#) of Contact Interests

Usage Notes

None

Contact Revenue History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Revenue History subject area enables you to analyze product revenue data by contact, product, product category, owner and date. The metrics in this subject area include the following:

- Number (#) of products
- Average Number (Avg #) of Products
- Avg Revenue

It allows users to create reports showing different types of product revenue over time, such as projected revenue compared to actual. This comparison enables users to better understand the revenue potential and

sales of products by contacts. You use the Product Category dimension to summarize Contact Revenue metrics for different levels of a product hierarchy, such as brand, submarket, and market.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Contact
- Product Category
- Product
- Contact Revenue
- Date
- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Revenue Metrics
 - Avg Number (#) of Products
 - Number (#) of Products
 - Avg Revenue

Usage Notes

None

Contact Team History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the many-to-many relationship between contacts and team members. You can use it to list all team members associated with a contact and all contacts where a user is added as a team member. You cannot use this subject area to report on contacts who are not associated with

any user or to report on users not linked to a contact. This subject area does not have any fact tables nor any metrics.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Contact
- Team Member

Metrics

None

Usage Notes

None

Deal Registration History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Deal Registration reporting subject area provides information on how your partners are using deal registrations and the effect that deal registration has on your business. For example, you can do the following:

- Create a report to show the amount of revenue expected from deal registrations.
- Determine the average number of days that it takes to approve a deal registration.
- Determine the percentage of opportunities that has been registered.
- Report on the number of deal registrations that has resulted in new opportunities.
- Determine the average validity period of deal registrations.
- Report on the quarterly change in revenue from deal registrations.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Deal Registration
- Principal Partner Account
- Associated Customer
- Contact
- Date
- Associated Opportunity
- Owned By User
- Final Approver

Non-Close Date Metrics

The following metrics are not based on the Close Date of the registrations:

- Deal Registration Metrics
 - Deal Registration Custom Metrics
 - Number (#) of Deal Registrations
 - Number (#) of Deal Registrations with Opportunities
 - Number (#) of Deal Registrations without Opportunities
 - Number (#) of Deal Registrations for new Opportunities
 - Number (#) of Deal Registrations for existing Customers
 - Number (#) of Deal Registrations for new Customers
 - Number (#) of Deal Registrations converted to Opportunity
 - Number (#) of Deal Registrations pending approval
 - Number (#) of approved Deal Registrations
 - Number (#) of expired Deal Registrations
 - Number (#) of days pending approval
 - Average (Avg) Days to approval
 - Avg validity period (in days)
 - Percentage (%) of Deal Registrations Approved
 - Percentage (%) of Deal Registrations Rejected
 - Percentage (%) of Deal Registrations Returned
 - Percentage (%) of Deal Registrations converted to Opportunity
 - Number (#) of Deal Registrations resulting in wins

Close Date Metrics

The following metrics are based on the Close Date of the registrations:

- Deal Registration Metrics
 - Total Deal Size on open Deal Registrations
 - Avg Total Deal Size on open Deal Registrations
 - Total Revenue from Deal Registrations
 - Avg Total Revenue from Deal Registrations
 - Quarter Ago Total Revenue from Deal Registrations
 - Avg Quarter Ago Total Revenue from Deal Registrations

Usage Notes

None

Deal Registration Product Revenue History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Deal Registration Product Revenue History subject area helps you identify trends and tendencies around your deal registration line items. It enables you to create basic queries involving Deal Registration Product Revenue metrics using core dimension attributes. It can help you answer questions such as:

- What is the maximum revenue expected from a single product on a single deal registration?
- Considering only open deal registrations, what is the average revenue for each deal registration (as calculated from revenue records)?
- How many unique products are referred to on all deal registrations (irrespective of the approval status)?
- What are the top products for all open deal registrations: by total quantity, by total revenue, by occurrence, by average quantity for each deal registration, or by average revenue for each deal registration?
- List all open deal registrations that have at least one product revenue line item with either zero or null quantity or zero or null price.
- What were the top products a quarter ago: by quantity, by revenue, by occurrence, by average quantity per deal registration, or by average revenue for each deal registration?

Relationship Type

One-to-many

Dimensions

This subject area has the following dimensions:

- Associated Contact
- Associated Customer
- Associated Opportunity
- Date (based on the Close Date of the Deal Registration)
- Deal Registration
- Deal Registration Product Revenue
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Product
- Product Category

Metrics

The subject area has the following metrics:

- Deal Registration Product Revenue Metrics
 - Deal Registration Product Revenue Custom Metrics:
 - Avg Indexed Currency
 - Avg Indexed Number
 - Indexed Currency
 - Indexed Number
 - Number (#) of Products
 - Number (#) of Products on Deal Registrations without Opportunities
 - Number (#) of Products on Open Deal Registrations
 - Average Number (Avg #) of Products on Deal Registrations without Opportunities
 - Average Number (Avg #) of Products on Open Deal Registrations
 - Avg Price
 - Avg Quantity
 - Avg Quarter Ago Total Revenue
 - Avg Revenue
 - Avg Total Quantity on Deal Registrations without Opportunities

- Avg Total Quantity on Open Deal Registrations
- Avg Total Revenue on Deal Registrations without Opportunities
- Avg Total Revenue on Open Deal Registrations
- Average Number (Avg #) of Products (Per Deal Registration)
- Quarter Ago Total Revenue
- Quarter Ago Total Revenue (000)
- Total Quantity
- Total Quantity (000)
- Total Quantity on Deal Registrations without Opportunities
- Total Quantity on Open Deal Registrations
- Total Revenue
- Total Revenue (000)
- Total Revenue on Deal Registrations without Opportunities
- Total Revenue on Deal Registrations without Opportunities (000)
- Total Revenue on Open Deal Registrations
- Total Revenue on Open Deal Registrations (000)
- Principal Partner Account

Usage Notes

None

Dealer History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Automotive Edition.

Business Purpose

The Dealer History Analytic subject area provides the ability to analyze dealer history with respect to service requests and activities.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Dealer
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Dealer Metrics
 - Dealer Custom Metrics
 - Number (#) of Dealers
 - Number (#) of Service Requests (SRs)
 - Number (#) of Activities
 - Number (#) of Open Activities
 - Number (#) of Closed Activities

Usage Notes

None

Household History Analytic Subject Area

Availability

This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose

The Household History Analytics subject area provides the ability to generate reports on households for the Contact dimension. This report enables advisors and their managers to answer questions, such as the following:

- Which clients belong to which households?
- How are the household assets in my book of business divided up among my clients?
- What are my top households by total asset value?

You can combine household reports with portfolio reports to provide an enhanced client service by understanding clients as members of a household.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Household
- Contact
- Household Contact

Metrics

The complete list of metrics for this subject area is as follows:

- Household Metrics
 - Total Household Assets
 - Total Household Assets
 - Average (Avg) Total Household Assets
 - Total Household Expenses
 - Total Household Expenses
 - Avg Total Household Expenses
 - Total Household Income
 - Total Household Income
 - Avg Total Household Income
 - Total Household Liabilities
 - Total Household Liabilities
 - Avg Total Household Liabilities
 - Total Household Net Worth
 - Total Household Net Worth
 - Avg Total Household Net Worth
- Total Contact Assets
 - Total Assets
 - Avg Total Assets
- Total Contact Expenses
 - Total Expenses
 - Avg Total Expenses
- Total Contact Income

Reports

- Total Income
- Avg Total Income
- Total Contact Liabilities
 - Total Liabilities
 - Avg Total Liabilities
- Total Contact Net Worth
 - Total Net Worth
 - Avg Total Net Worth
- Household Custom Metrics
- Number (#) of Rolled Up Contacts
- Number (#) of Rolled Up Service Requests
- Number (#) of Rolled Up Leads
- Number (#) of Contacts
- Number (#) of Contact Service Requests
- Number (#) of Contact Leads
- Number (#) of Households

Usage Notes

None

Lead History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the lead metrics by account, account territory, campaign, contact, date, lead, opportunity, owned by user, and principal partner account. This subject area contains record types that refer to metrics that analyze the lead quality, lead conversion, and revenues associated with leads.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Contact
- Date
- Lead
- Opportunity
- Owned By User
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)

Metrics

The complete list of metrics for this subject area is as follows:

- Lead Metrics
 - Number (#) of Archived Leads
 - Number (#) of Leads
 - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
 - Number (#) of Leads Resulting in Lost Opportunity
 - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
 - Number (#) of New Opportunities
 - Number (#) of Qualified Leads
 - Number (#) of Rejected Leads
 - Number (#) of Wins
 - Average (Avg) Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads that were converted to opportunities.)
 - Avg Days to Followup Lead
 - Closed Revenue for Lead
 - Expected Revenue for Lead
 - Opportunity Revenue for Lead
 - Projected Revenue

Usage Notes

None

MDF Request History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

Market Development Funds (MDF) provide the brand owner with the ability to make marketing funds available to partners in a systematic way, so that partners sell the brand owner's products in specific geographical areas or market the brand. Through MDF Requests, partners request preapprovals of funding for marketing activities. When the brand owner approves the MDF request, partners can execute the activity and then submit an MDF claim to redeem the preapproved money that was spent.

Brand owners require metrics and information about MDF requests for each partner and quarter so that they can align marketing and channel sales. The MDF Request Historical Analytics subject area gives brand owners the required information to control their MDF budgets and ensure that funds are allocated to activities that have the maximum return on investment.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Principal Partner Account
- Campaign
- MDF Request
- Date
- Owned By User
- Approver

Metrics

The complete list of metrics for this subject area is as follows:

- MDF Request Metrics
 - MDF Request Custom Metrics
 - MDF Request Metrics by Submitted Date

- Number (#) of MDF Requests
- Amount Requested
- Average Amount Requested
- Amount Pre-Approved
- Average Amount Pre-Approved
- Total Claim Amount Requested
- Average Total Claim Amount Requested
- Total Claim Amount Approved
- Average Total Claim Amount Approved
- Number (#) of MDF Requests
- Amount Requested
- Average Amount Requested
- Amount Pre-Approved
- Average Amount Pre-Approved
- Quarter Ago Amount Requested
- Average Quarter Ago Amount Requested
- Quarter Ago Amount Pre-Approved
- Average Quarter Ago Amount Pre-Approved
- Total Claim Amount Requested
- Average Total Claim Amount Requested
- Total Claim Amount Approved
- Average Total Claim Amount Approved
- Quarter Ago Total Claim Amount Requested
- Average Quarter Ago Total Claim Amount Requested
- Quarter Ago Total Claim Amount Approved
- Average Quarter Ago Total Claim Amount Approved
- Number (#) of MDF Request Pending Approval
- Amount Requested Pending Approval
- Number (#) of Submitted MDF Requests
- Number (#) of Approved MDF Requests
- Number (#) of Reject MDF Requests
- Number (#) of Returned MDF Requests
- Number (#) of Cancelled MDF Requests
- Number (#) of Expired MDF Requests

- Number (#) of Submitted MDF Claims
- Number (#) of Approved MDF Claims
- Number (#) of Rejected MDF Claims
- Percentage (%) of MDF Requests Approved
- Percentage (%) of MDF Requests Expired
- Percentage (%) of MDF Requests Rejected
- Percentage (%) of MDF Requests Returned
- Number (#) of Days Pending Approval
- Number (#) of Days to Approval
- Average Number (Avg #) of Days Pending Approval
- Avg Number (#) of Days To Approval

Usage Notes

If your company changes the display name for MDF Requests to a custom name, the custom name appears in Oracle CRM On Demand Answers.

MedEd Event History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Life Sciences Edition.

Business Purpose

A MedEd event can be any type of promotional or education event that is attended by physicians or medical professionals. From a company's perspective, the following are the MedEd event types:

- **Sales Representative Level.** Executed by a manager or one or more sales representatives.
- **Corporate or National Level.** A national training event or meeting targeted at a specific group of medical professionals.

You can plan events at the national level for either a specific product or period and then allocate resources by region, district, or sales representative. Pharmaceutical companies require metrics and information about medical events to align sales and marketing activities. From a compliance perspective, reports provide information to companies, so that companies can control their budgets and ensure that there is little or no deviation.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- MedEd Event
- Invitees
- Product Category
- Product
- Date
- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- MedEd Metrics
 - Number (#) of Invitees
 - Number (#) of MedEd Events
 - MedEd Event Cost

(Definition: The cost of the completed activities for all attendees associated with a MedEd Event.)
 - MedEd Event Budget

The Event Budget metric comes from the dimension. When only the MedEd dimension is used the metric is the sum of the dimension field value. However, when other dimensions (particularly invitee) are used, the metric is calculated as the maximum of the dimension field value.
 - Budget Surplus/Shortfall

(Definition: The difference between the event budget and the event cost.)

Usage Notes

If your company changes the display name for MedEd Event to a custom name, the custom name appears in Oracle CRM On Demand Answers.

Opportunity and Competitor History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the many-to-many relationship between opportunities and competitor accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the competitor account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the competitors for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and competitor accounts, opportunities that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Opportunity Competitor
- Relationship Contact
- Account
- Account Territory
- Opportunity
- Campaign
- Primary Contact
- Territory
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
 - Opportunity Custom Metrics
 - Opportunity Metrics by Open Date
 - Number (#) of Open Opportunities
 - Number (#) of Opportunities
 - Number (#) of Contacts with Opportunities (Optys)
 - Closed Revenue
 - Expected Revenue
 - Revenue
 - Average Number (Avg #) of Days in Stage
 - Number (#) of Wins
 - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or the amount of revenue.)
 - Avg Sales Cycle
 - Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)
 - Opportunity Loss Rate
 - Revenue
 - Expected Revenue
 - Closed Revenue
 - Number (#) of Opportunities
 - Number (#) of Open Opportunities
 - Number (#) of Contacts with Opportunities (Optys)
 - Number (#) of Wins
 - Average Number (Avg #) of Days in Stage
 - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or amount of revenue.)
 - Avg Sales Cycle
 - Opportunity Win Rate (Definition: The total number of win opportunities divided by the total number of won and lost opportunities.)
 - Opportunity Loss Rate
 - Quarter Ago Opportunity Revenue
 - Quarter Ago Closed Revenue

Usage Notes

None

Opportunity and Partner History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the many-to-many relationship between opportunities and partner accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the partner account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the partners for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and partner accounts, opportunities that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Opportunity Partner
- Relationship Contact
- Account
- Account Territory
- Opportunity

- Campaign
- Primary Contact
- Territory
- Owned By User
- Date

Metrics

The list of metrics for this subject area is as follows:

- Opportunity Metrics
 - Opportunity Custom Metrics
 - Opportunity Metrics by Open Date
 - Number (#) of Open Opportunities
 - Number (#) of Opportunities
 - Number (#) of Contacts with Opportunities (Optys)
 - Closed Revenue
 - Expected Revenue
 - Revenue
 - Average Number (Avg #) of Days in Stage
 - Number (#) of Wins
 - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)
 - Avg Sales Cycle
 - Opportunity Win Rate (Definition: The number of win opportunities divided by the total number of won and lost opportunities.)
 - Opportunity Loss Rate
- Revenue
- Expected Revenue
- Closed Revenue
- Number (#) of Opportunities
- Number (#) of Open Opportunities
- Number (#) of Contacts with Optys
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage
- Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)

Reports

- Avg Sales Cycle
- Opportunity Win Rate (Definition: The number of win opportunities divided by the total number of won and lost opportunities.)
- Opportunity Loss Rate
- Quarter Ago Opportunity Revenue
- Quarter Ago Closed Revenue

Usage Notes

None

Opportunity History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze opportunities by account, territory, campaign, contact, territory, owner, and date dimensions. This subject area consists of two or more fact tables and includes opportunity and quota metrics. Opportunity metrics are defined at the lowest level of detail in this subject area. So, you can analyze the metrics for all dimensions. However, quota metrics are at a higher level of detail and can be analyzed only by the following limited dimensions: Date (Month), Quota, and Owner.

Relationship Type

Multi-fact

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Opportunity
- Campaign
- Primary Contact
- Territory
- Owned By User
- Date

- Principal Partner Account
- Quota

Metrics

The list of metrics for this subject area is as follows:

■ Opportunity Metrics

Opportunity Custom Metrics

- Opportunity Metrics by Open Date
 - Number (#) of Open Opportunities
 - Number (#) of Opportunities
 - Number (#) of Contacts with Opportunities (Optys)
 - Closed Revenue
 - Expected Revenue
 - Revenue
 - Average Number (Avg #) of Days in Stage
 - Number (#) of Wins
 - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)
 - Avg Sales Cycle
 - Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)
 - Opportunity Loss Rate
- Revenue
- Expected Revenue
- Closed Revenue
- Number (#) of Opportunities
- Number (#) of Open Opportunities
- Number (#) of Contacts with Optys
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage
- Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)
- Avg Sales Cycle
- Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)

Reports

- Opportunity Loss Rate
- Quarter Ago Opportunity Revenue
- Quarter Ago Closed Revenue
- Quota Metrics
 - Quota Value

Usage Notes

None

Opportunity Product Revenue History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze opportunity product revenues by account, account territory, partner, campaign, opportunity, opportunity product, owned by user, product, and product category. Because each recurring product-revenue record might have a different start date, this subject area is at the most granular level of detail and contains one row for each recurring product-revenue record within the opportunity. Given the high level of detail of this subject area, it provides the greatest flexibility to roll up data at any level of the supported dimensions. This subject area also contains the quota dimension and metrics, which allow you to report on both opportunity product revenue and quota metrics in the same report.

Relationship Type

Multi-fact

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Date
- Opportunity
- Opportunity Product Revenue
- Owned By User

- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Product
- Product Category
- Quota
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Product Revenues Metrics
 - Number (#) of Products
 - Average Number (Avg #) of Products
- Quota Metrics
 - Quota Value

Usage Notes

None

Partner History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Partner History Analytic subject area provides the ability to analyze partner history. You can analyze leads, opportunities, and revenue by partner and territory.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Partner
- Territory

- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Owner Partner Metrics
 - Number (#) of Opportunities
 - Number (#) of Partners with Opportunities
 - Number (#) of Wins
 - Average (Avg) Closed Revenue
 - Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
 - Closed Revenue
 - Closed Revenue (000)
 - Product Closed Revenue
 - Product Closed Revenue (000)
 - Product Revenue (000)
 - Number (#) of Leads
 - Number (#) of Archived Leads
 - Number (#) of Qualified Leads
 - Number (#) of Rejected Leads
 - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
 - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
 - Number (#) of Leads Resulting in Lost Opportunity
 - Avg Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads converted to opportunities.)
 - Avg Days to Followup Lead
 - Avg Potential Revenue
 - Potential Revenue
 - Potential Revenue (000)
 - Number (#) of Partners with Leads
 - Partner Custom Metrics
 - Number (#) of Partners

Usage Notes

None

Pipeline History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The pipeline history subject area provides a monthly snapshot of all opportunities in Oracle CRM On Demand. Pipeline snapshots are taken daily during the nightly process, but the archiving process keeps only the latest pipeline snapshot for each month and purges the other snapshots. These pipeline snapshots are never deleted. During the full extract, transform and load (ETL) of data, these snapshots are backed up and fully restored. If companies change their fiscal calendar type, these historical snapshots will not be realigned with their new fiscal calendar definition. For companies with a custom fiscal calendar type, these historical snapshots can be reported only for the fiscal year definitions that are defined in Oracle CRM On Demand. Snapshots are taken only for opportunities that were closed in the last quarter. However, snapshots are taken for all open opportunities.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Owned By User
- Opportunity
- Pipeline Snapshot Date
- Date
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Historical Pipeline Metrics
 - Revenue (Definition: The revenue from the opportunity.)
 - Expected Revenue (Definition: Opportunity revenue multiplied by the probability of the opportunity.)

Reports

- Closed Revenue (Definition: The revenue of the closed/won opportunity. When the opportunity's status is closed/won Revenue and Closed Revenue have the same value.)
- Revenue (000) (Definition: The revenue from the opportunity, in thousands.)
- Expected Revenue (000) (Definition: Opportunity revenue multiplied by the probability of the opportunity, in thousands.)
- Closed Revenue (000) (Definition: The revenue of the closed/won opportunity, in thousands. When the opportunity's status is closed/won Revenue and Closed Revenue have the same value.)
- Quarter Ago Opportunity Revenue (Definition: The value of Revenue from one quarter ago.)
- Quarter Ago Expected Revenue (Definition: The value of Expected Revenue from one quarter ago.)
- Quarter Ago Closed Revenue (Definition: The value of Closed Revenue from one quarter ago.)
- Quarter Ago Opportunity Revenue (000) (Definition: The value of Revenue (000) from one quarter ago.)
- Quarter Ago Expected Revenue (000) (Definition: The value of Expected Revenue (000) from one quarter ago.)
- Quarter Ago Closed Revenue (000) (Definition: The value of Closed Revenue (000) from one quarter ago.)
- Territory

Usage Notes

None

Portfolio History Analytic Subject Area

Availability

This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose

This subject area provides the ability to analyze portfolio history, contacts, and products. Portfolio reports provide the capability to generate reports about portfolios for the following dimensions: Contact, Account, Product, Advisor, and Time. This report enables advisors and their managers to answer questions, such as the following:

- What financial products do clients own and what is their demographic profile?
- How much of my clients' assets are invested in which securities and asset classes?
- What is the size of assets in each advisor's book of business?
- What are the asset classes in each advisor's book of business?
- Who are my best clients by portfolio size and revenue?

This information allows you to analyze portfolios with respect to both clients and advisors.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Institution
- Date
- Product
- Contact
- Owned By User
- Portfolio

Metrics

The complete list of metrics for this subject area is as follows:

- Portfolio Metrics
 - Portfolio Custom Metrics
 - Number (#) of Portfolios
 - Total Asset Value
 - Loan Amount
 - Premium
 - Revenue
 - Face Value
 - Credit Limit
 - Average (Avg) Total Asset Value
 - Avg Loan Amount
 - Avg Premium
 - Avg Revenue
 - Avg Face Value
 - Avg Credit Limit

Usage Notes

None

Product History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables you to analyze revenue metrics by product, account, user, opportunity, date, and territory dimensions. The level of detail of this subject area is slightly higher than the Opportunity-Product Reporting subject area, because it allows you to analyze opportunity revenues from the focus of the product dimension. This subject area bridges the analysis gap between the Opportunities Reporting subject area and Opportunity-Product Reporting subject area.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Owned By User
- Opportunity
- Products
- Date
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Product Revenue Metrics
 - Product Revenue Custom Metrics
 - Revenue
 - Product Expected Revenue
 - Product Closed Revenue
 - Product Revenue (000)

- Product Expected Revenue (000)
- Product Closed Revenue (000)
- Purchase Price
- Avg Purchase Price
- Avg Quantity
- Total Quantity
- Quarter Ago Product Revenue
- Quarter Ago Product Closed Revenue
- Quarter Ago Product Revenue (000)
- Quarter Ago Product Closed Revenue (000)

Usage Notes

None

Sales Stage History Analytic Subject Area

The Sales Stage History has the following subject areas.

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows analyzing opportunities at different sales stages by account, opportunity, sales stage, and date dimensions. The sales stage history subject area represents event-based historical snapshots of opportunities and only available on the historical side. Because opportunities go through multiple sales stages, this subject area is denser than the opportunities subject area with as many records as number of opportunities times sales stages they went through.

Relationship Type

Simple

Dimensions

This subject area offers the following dimensions:

- Account
- Opportunity

- Historical Sales Stage

Metrics

The following is the complete list of metrics for this subject area:

- Sales Stage Metrics
 - Avg Days in Stage
 - Number of (#) of Days in Stage
 - Number of (#) of Opportunities
 - Fallout
 - Fallout Ratio

Usage Notes

None

Service Request History Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze service request history, accounts, and assets. This subject area provides the ability to analyze service requests by account, contact, service request, user, partner, and date dimensions. It helps you to measure and analyze important performance metrics of the customer service request organization, including how long service requests have been open and the average duration to close them. Using these service request performance metrics can help your company to improve customer satisfaction, employee productivity, and reduce operational costs.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Asset
- Contact

- Date
- Dealer
- Owned By User
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Product
- Service Request
- Vehicle

Metrics

The complete list of metrics for this subject area is as follows:

- Service Request Metrics
 - Service Request Metrics by Close Date
 - Number (#) of Cancelled SRs (Close Date)
 - Number (#) of Closed Service Requests (SRs) (Close Date)
 - Average (Avg) Days to Close SRs (Close Date)
 - Avg Minutes to Close SRs (Close Date)
 - Service Request Custom Metrics
 - Number (#) of SRs
 - Number (#) of Open SRs
 - Number (#) of Closed SRs
 - Number (#) of Pending SRs
 - Number (#) of Cancelled SRs
 - Avg Open SR Age
 - Avg Days to Close SR
 - Avg Open SR Age (Minutes)
 - Avg Minutes to Close SRs

Usage Notes

The custom fields in the Vehicle dimension are shared between the Vehicle record type and the Asset record type. The Vehicle record type has two sets of custom fields: one set that is shared with the Asset record type and appears in the Vehicle dimension, and one set that is exclusive to the Vehicle record type only. The custom fields that are exclusive to the Vehicle record type are not available in any reports. When adding custom fields to the Vehicle record type make sure that any fields that you want to appear in reports are added to the shared Asset-Vehicle custom fields and not to the Vehicle-only custom fields.

Special Pricing Product History Analytic Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

Special pricing requests allow partners and brand owners to execute a set of business processes, by which a partner asks the brand owner for a lower price on a product (for various reasons, such as a response to a competitive deal or general downward price trends).

This subject area provides you with the ability to perform historical analysis and report on special pricing requests and special pricing products, so you can assess partner performance. You can use metrics and information, such as authorized price reductions for each product, partner, and quarter to measure discount effectiveness and product performance in the channel.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Date (based on the Special Pricing Request Start Date)
- Deal Registration
- End Customer
- Last Approved By
- Opportunity
- Owned By User
- Principal Partner Account
- Product
- Product Category
- Special Pricing Request

Metrics

The complete list of metrics for this subject area is as follows:

- Special Pricing Product Metrics
 - Special Pricing Product Metrics by Authorized Date
 - Number (#) of Special Pricing Requests (Authorized Date)

- Amount Authorized (Authorized Date)
- Amount Authorized (Authorized Date) (000)
- Amount Requested (Authorized Date)
- Amount Requested (Authorized Date) (000)
- Avg Amount Authorized (Authorized Date)
- Avg Amount Requested (Authorized Date)
- Avg Quantity (Authorized Date)
- Quantity (Authorized Date)
- Special Pricing Product Metrics by Submitted Date
 - Number (#) of Special Pricing Requests (Submitted Date)
 - Amount Authorized (Submitted Date)
 - Amount Authorized (Submitted Date) (000)
 - Amount Requested (Submitted Date)
 - Amount Requested (Submitted Date) (000)
 - Avg Amount Authorized (Submitted Date)
 - Avg Amount Requested (Submitted Date)
 - Avg Quantity (Submitted Date)
 - Quantity (Submitted Date)
- Number (#) of Special Pricing Requests
- Amount Authorized
- Amount Authorized (000)
- Amount Requested
- Amount Requested (000)
- Avg Amount Authorized
- Avg Amount Requested
- Avg Authorized Cost
- Avg Authorized Discount Percent
- Avg MSRP (Manufacturer's Suggested Retail Price)
- Avg Purchase Cost
- Avg Quantity
- Avg Requested Cost
- Avg Requested Discount Percent
- Avg Requested Resale Price
- Avg Suggested Resale Price

- Quantity
- Quarter Ago Amount Authorized
- Quarter Ago Amount Authorized (000)
- Quarter Ago Amount Requested
- Quarter Ago Amount Requested (000)
- Quarter Ago Quantity

Usage Notes

None

Usage Tracking Analysis Analytic Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand. Access to this subject area requires the Usage Tracking privilege. The administrator user role is granted this privilege by default.

Business Purpose

This subject area enables users with the Usage Tracking privilege to analyze the usage of Oracle CRM On Demand within their company. Companies can analyze the usage of the following application areas in Oracle CRM On Demand:

- Application usage
- User adoption
- Setup and configuration

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Content
- Date
- Object Type
- User

Metrics

The complete list of metrics for this subject area and the fields for which they are stored is as follows:

The following table shows the Analytics Performance metrics. These metrics represent the performance of queries.

Metric	User	Date (Week)	Object Type	Description
Number (#) of Requests	Yes	Yes	Yes	Number of requests by report and dashboard names by week.
Number (#) of Times Failed	Yes	Yes	Yes	Number of times requests failed by report and dashboard names by week.
Average (Avg) Response Time (s)	Yes	Yes	Yes	Average response time (in seconds) for requests.

The following table shows the Application Usage metrics in Oracle CRM On Demand. These metrics represent the usage of various application object types, including how many records were created, updated, and deleted. In the table, Yes indicates that the metric is available for the field.

Metric	User	Date (Week)	Object Type	Description
Number (#) of Records Created	Yes	Yes	Yes	Number of records created by object by user by month
Number (#) of Records Updated	Yes	Yes	Yes	Number of records updated by object by user by month
Number (#) of Records Deleted	Yes	Yes	Yes	Number of records deleted by object by user by month

The following table shows the Page View Performance metrics in Oracle CRM On Demand.

Metric	User	Date (Week)	Object Type	Description
Number (#) of Requests	Yes	Yes	Yes	Number of requests by page by week
Average (Avg) Response Time (ms)	Yes	Yes	Yes	Average response time (in milliseconds) for page views

The following table shows the Setup and Configuration metrics. These metrics are a snapshot of the latest setup and configuration of Oracle CRM On Demand as it existed at the time of an incremental refresh of your usage tracking data. The setup and configuration metrics are unique because they are not captured at any dimension level.

Metric	Description
Number (#) of Administrators	Number of administrators granted with any of the following privileges: Manage Company, Manage Company - Define Currencies, Manage Company - Reset All Passwords, Manage Themes, Manage Content, Manage Content - Manage Attachments, Manage Books, Manage Territories, Manage Users and Access, Manage Users and Access - Manage Delegated Users

Reports

Number (#) of Assignment Rules	Number of assignment rules defined in Oracle CRM On Demand
Number (#) of Books	Number of books defined in Oracle CRM On Demand
Number (#) of Currencies	Number of currencies activated in Oracle CRM On Demand
Number (#) of Custom Fields	Number of custom fields used in Oracle CRM On Demand
Number (#) of Custom Objects	Number of custom objects deployed in Oracle CRM On Demand
Number (#) of Custom Tabs	Number of custom Web tabs used in Oracle CRM On Demand
Number (#) of Groups	Number of groups set up in Oracle CRM On Demand
Number (#) of Languages	Number of languages enabled in Oracle CRM On Demand
Number (#) of Products	Number of products defined in Oracle CRM On Demand
Number (#) of Sales Process	Number of sales processes defined in Oracle CRM On Demand
Number (#) of Territories	Number of territories set up in Oracle CRM On Demand
Number (#) of Web Applets	Number of Web applets used in Oracle CRM On Demand
Number (#) of Web Links	Number of Web links used in Oracle CRM On Demand
Number (#) of Workflows	Number of workflows set up in Oracle CRM On Demand

The following table shows the User Adoption metrics. These metrics allow companies to monitor and analyze the user adoption of the Oracle CRM On Demand application. In the table, Yes indicates that the metric is available for the field.

Metric	User	Date (Week)	Description
Number (#) of Active Users	No	Yes	Number of active users existing in the application
Number (#) of Days Since Last Login	Yes	No	Number of days since the last login by the user
Number (#) of Delegated Users	No	Yes	Number of delegated users existing in that week
Number (#) of Licenses	No	No	Number of licenses defined in the company profile

Number (#) of Total Logins	Yes	Yes	Number of times a user logged in during a given month. If a user logs in three times today, it is counted as 3 for the current week.
Number (#) of Unique Logins	Yes	Yes	Number of unique times a user logged in a given month. If a user logs in three times today, it is counted as 1 for the current week.
Number (#) of Unsuccessful Logins	Yes	Yes	Number of unsuccessful logins by user by month
Percentage (%) Logged In	No	Yes	Number of users logged in that week divided by the number of active users.
Average (Avg) Login Monthly Frequency	No	Yes	Number of unique logins for a given month divided by the number of users logged in for that month.

Usage Notes

This topic provides usage notes.

About Usage Tracking Data

The usage tracking data in the data warehouse refreshes weekly from information in your Oracle CRM On Demand application data. Refreshing the usage tracking data happens on weekends and does not follow the nightly, incremental refresh of the rest of the data in Oracle CRM On Demand Answers.

Usage tracking metrics are recomputed only for the current month, and the prior month's data is not recomputed unless the week spans the end of the month. For example, when the incremental refresh for usage tracking runs on Friday, 28 May 2010, the usage tracking metrics are recomputed for the entire month of May starting from May 1, 2010. When the incremental refresh for usage tracking runs on Friday, 4 June 2010, the usage tracking metrics are recomputed for the months of both May and June, because that week spanned the months of May and June.

Usage tracking metrics are summarized by calendar months. Even though it is possible to analyze these metrics by a company's fiscal calendars, they are not aligned with the fiscal calendar for companies with nonstandard calendars. There might be some oddity in a fiscal calendar definition especially if you are using a 4-4-5 or 5-4-4 or a custom calendar where two calendar months start in one fiscal period or no calendar month starts in a fiscal period. In situations like this, the usage tracking metrics might be inflated or missing for a given fiscal period.

Most usage tracking data is captured at the week level. Some user adoption metrics are not captured at the week level. All setup and configuration metrics are not captured at the week level. Because the usage tracking data is captured at the week level, it can be aggregated by month, quarter, and year. However, it might not produce any results if it is run at levels lower than the week level.

About User-Login History

The user-login history data that is older than 90 days is continuously purged from the Oracle CRM On Demand application. Hence, the Usage Tracking feature can support approximately 90 days of user adoption metrics when the Oracle CRM On Demand application is first upgraded to this release. However, the user adoption history data is retained in the data warehouse to support the historical trend analysis of user adoption metrics in the Oracle CRM On Demand Analytics. This data is retained until the next full refresh even after the data is purged from Oracle CRM On Demand.

Usage Tracking Metrics

Usage tracking metrics are collected by calendar week. If you are using a nonstandard calendar, such as 5-4-4, 4-4-5, or a custom fiscal calendar, then it is possible that one fiscal month or quarter might have more or fewer weeks compared to other fiscal months or quarters. So, your metrics might appear slightly inflated or deflated for a given month or quarter. This behavior is expected where your company's metrics are not fully aligned with its fiscal calendar definitions when they are analyzed by fiscal calendar months and quarters.

Content Dimension

The Content dimension is common to both the Analytics Performance metrics and Page View Performance metrics.

To report on Analytics Performance metrics, use the Content Category field to filter for the following condition:

`Content Category = Analytics`

To report on Page View Performance metrics, use the Content Category field to filter for the following condition:

`Content Category = Page View`

When analyzing Page View Performance metrics, the only Content dimension fields available are: Content Category and Content Name. For Page Views Performance, the Content Name value represents the title of the screen. For Analytics Performance, the Content Name value represents the report or dashboard name.

Analytics Performance Metrics

You cannot combine Analytics Performance metrics with any other metrics. You cannot combine the Page View Performance metrics with any other metrics. These two performance-related metrics are stored using different levels of detail, which are different from each other and from all the other metrics. The Analytics Performance metrics are captured at the content, user, and week level. These metrics are collected as each report is executed every time by each user, and they are summarized at the week level. The average response time is measured in seconds.

In contrast, the Page View Performance metrics are captured at the page and week level. These metrics are collected as each page is viewed each time, and they are summarized at the week level. The average response time is measured in milliseconds.

Analytics performance metrics can report metrics by individual users. However, page view performance is only at the company level. Most page views have a title, but for page views with missing titles the usage performance metric is reported as *Others*. Analytics performance metrics are included for shared and personal dashboards, but are not included for dynamic queries. Both page view and analytics content names display metrics that are based on the company default language and standard object naming. They do not support user language or object renaming.

Account Revenues Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Account Revenue Analytics subject area provides the ability to track account revenues by product, category, territory, and user.

Relationship Type

Multi-Fact

Dimensions

This subject area has the following dimensions:

- Account
- Account Revenue
- Account Territory
- Campaign
- Owned By User
- Product
- Product Category
- Quota

Optimized Filtering Fields

This subject area has fields that are optimized to reduce the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

Reports

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Account Revenue Metrics:
 - Account Revenue Custom Metrics
 - Number (#) of Products
 - Average Number (Avg #) of Products
- Quota Metrics:
 - Quota Value

Usage Notes

For more information about account revenue capabilities, see [Forecasts Reporting subject area](#) (on page 805). In the Forecast subject area, you can combine forecast, quota, and account revenues into a single, queried report. Quota folder dimensions and metrics can be combined only with Owned by User folder dimensions and metrics.

Accounts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides a summary view of the operating metrics for a company's accounts. The account record type is the record type that you want to analyze. You can use this subject area to answer basis questions about account performance: Which companies have the highest number of service requests? Which companies have the largest number of opportunities? This subject area allows you to group and roll up these metrics at any level by account, account territory, and date dimensions. For a deeper analysis involving other business areas, you must use other subject areas.

Relationship Type

Summary

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Territory
- Owned By User
- Date Created

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Revenue
 - Revenue (000)
 - Average (Avg) Revenue
 - Closed Revenue
 - Closed Revenue (000)
 - Average (Avg) Closed Revenue
 - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
 - Potential Revenue
 - Average (Avg) Potential Revenue
 - Revenue
 - Product Revenue (000)
 - Product Closed Revenue
 - Product Closed Revenue (000)

Reports

- Number (#) of Accounts
- Number (#) of Accounts with Opportunities
- Number (#) of Activities
- Number (#) of Contacts
- Number (#) of Opportunities
- Number (#) of Wins
- Number (#) of Service Request (SRs)
- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads

Usage Notes

None

Accounts and Competitors Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the many-to-many relationship between accounts and competitor accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the competitor dimension, which has a many-to-many relationship with the account record type. It allows you to create reports that show all the competitors for an account. Because this subject area represents

the many-to-many relationship between accounts and competitor accounts, accounts that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account Competitor
- Relationship Contact
- Account
- Campaign
- Territory
- Owned By User
- Date Created

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Revenue
 - Revenue (000)
 - Average (Avg) Revenue
 - Closed Revenue
 - Closed Revenue (000)
 - Average (Avg) Closed Revenue
 - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
 - Potential Revenue
 - Average (Avg) Potential Revenue
 - Revenue
 - Product Revenue (000)
 - Product Closed Revenue
 - Product Closed Revenue (000)
 - Number (#) of Accounts
 - Number (#) of Accounts with Opportunities
 - Number (#) of Activities
 - Number (#) of Contacts
 - Number (#) of Opportunities
 - Number (#) of Wins
 - Number (#) of Service Requests (SRs)
 - Number (#) of Cancelled SRs
 - Number (#) of Closed SRs
 - Number (#) of Open SRs
 - Number (#) of Pending SRs
 - Average (Avg) Open SR Age
 - Average (Avg) Days to Close SR
 - Number (#) of Leads
 - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)

- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads

Usage Notes

None

Accounts and Partners Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and partner accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the partner dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports that show all the partners for an account. Because this subject area represents the many-to-many relationship between accounts and partner accounts, the accounts that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area offers the following dimensions:

- Account Partner
- Relationship Contact
- Account
- Campaign
- Territory
- Owned By User
- Date Created

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Revenue
 - Revenue (000)
 - Average (Avg) Revenue
 - Closed Revenue
 - Closed Revenue (000)
 - Average (Avg) Closed Revenue
 - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
 - Potential Revenue
 - Average (Avg) Potential Revenue
 - Revenue
 - Product Revenue (000)

- Product Closed Revenue
- Product Closed Revenue (000)
- Number (#) of Accounts
- Number (#) of Accounts with Opportunities
- Number (#) of Activities
- Number (#) of Contacts
- Number (#) of Opportunities
- Number (#) of Wins
- Number (#) of Service Requests (SRs)
- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads

Usage Notes

None

Accounts and Related Accounts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and related accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the related account dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports that show all the related accounts for an account. Because this subject area represents the many-to-many relationship between accounts and related accounts, accounts that do not have an association with at least one related account cannot be reported using this subject area. The attributes that define the related account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Related Account
- Relationship Contact
- Account
- Campaign
- Territory
- Owned By User
- Date Created

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account

■ Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Revenue
 - Revenue (000)
 - Average (Avg) Revenue
 - Closed Revenue
 - Closed Revenue (000)
 - Average (Avg) Closed Revenue
 - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
 - Potential Revenue
 - Average (Avg) Potential Revenue
 - Revenue
 - Product Revenue (000)
 - Product Closed Revenue
 - Product Closed Revenue (000)
 - Number (#) of Accounts
 - Number (#) of Accounts with Opportunities
 - Number (#) of Activities
 - Number (#) of Contacts
 - Number (#) of Opportunities
 - Number (#) of Wins
 - Number (#) of Service Requests (SRs)
 - Number (#) of Cancelled SRs
 - Number (#) of Closed SRs
 - Number (#) of Open SRs
 - Number (#) of Pending SRs
 - Average (Avg) Open SR Age
 - Average (Avg) Days to Close SR
 - Number (#) of Leads

- Number (#) of Leads Converted to Opportunities
- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads

Usage Notes

None

Activities Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze a set of activity metrics by activity, account, opportunity, lead, campaign, contact, service request, and date dimensions. Because this subject area represents every activity event and interaction in connection with these record types, this subject area is at the lowest level of detail, which means the activity fact table that determines this subject area might be the largest. This subject area allows you to roll up and analyze activity metrics, using the largest set of dimensions. This subject area is a multi-fact subject, which allows the reporting of user quotas in relation to activity metrics.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Lead
- Opportunity
- Service Request

- Quota

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Activity
- Campaign
- Contact
- Lead
- Opportunity
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Activity Metrics
 - Number (#) of Activities
 - Number (#) of Open Activities
 - Number (#) of Accounts with Activities
 - Number (#) of Closed Activities
- Quota Metrics
 - Quota Value

Usage Notes

None

Advanced Custom Objects Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze advanced custom objects.

Advanced Custom Objects area is a specialized subject area that allows the reporting of the one-to-many and many-to-one relationship between Custom Objects 4 through 15 and prebuilt objects, including Custom Objects 1,2, and 3. Because the Advanced Custom Objects area unites the reporting of all objects under a single subject area, it is necessary to include a determining metric for the report to help it choose a relationship path among the objects included in the report. The reporting of the many-to-many relationship is not possible using this subject area because it is not directly supported by Oracle CRM On Demand for Custom Objects 4 through 15.

The many-to-many relationship is implemented for Custom Objects 1,2, and 3 and account, contact, service request, and opportunity in Analytics. Hence, it is possible to report on the one-to-many relationship only between Custom Objects 1,2, and 3 and these objects. It is not possible to report on the one-to-many relationship between Custom Objects 1,2, and 3 and activities, assets, leads, and products.

Relationship Type

Federated

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Custom Object 04
- Custom Object 05
- Custom Object 06
- Custom Object 07
- Custom Object 08
- Custom Object 09
- Custom Object 10
- Custom Object 11
- Custom Object 12
- Custom Object 13
- Custom Object 14

- Custom Object 15
- Household
- Lead
- Opportunity
- Partner
- Product
- Service Request

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Activity
- Campaign
- Contact
- Lead
- Opportunity
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
 - Account Custom Metrics
 - Number (#) of Accounts
- Activity Metrics
 - Number (#) of Activities
 - Number (#) of Open Activities
 - Number (#) of Accounts with Activities
 - Number (#) of Closed Activities
- Campaign Metrics
 - Number (#) of Campaigns

- Number (#) of Campaigns Planned
- Number (#) of Campaigns Active
- Number (#) of Campaigns Completed
- Number (#) of Accounts for Campaign
- Number (#) of Contacts for Campaign
- Number (#) of Leads for Campaign
- Number (#) of Opportunities for Campaign
- Number (#) of Wins for Campaign
- Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)
- Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)
- Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 100, then divided by the revenue target.)
- Average (Avg) Days to Close Opportunity (Opty) for Campaign
- Cost per Closed Sale (Definition: The cost divided by the number of wins.)
- Average (Avg) Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)
- Cost per Lead (Definition: The cost divided by the number of leads.)
- Average (Avg) Cost Per Lead (Definition: The average cost divided by the number of leads.)
- Lead Conversion Rate for Campaign
- Closed Revenue for Campaign
- Opportunity Revenue for Campaign
- Average (Avg) Closed Revenue for Campaign
- Opportunity Win Rate for Campaign
- Return On Investment (ROI)
- Contact Metrics
 - Contact Custom Metrics
 - Number (#) of Contacts
- Household Metrics
 - Total Household Assets
 - Total Household Assets
 - Total Household Assets (000)
 - Average (Avg) Total Household Assets
 - Average (Avg) Total Household Assets (000)

- Total Household Expenses
 - Total Household Expenses
 - Total Household Expenses (000)
 - Average (Avg) Total Household Expenses
 - Average (Avg) Total Household Expenses (000)
- Total Household Income
 - Total Household Income
 - Total Household Income (000)
 - Average (Avg) Total Household Income
 - Average (Avg) Total Household Income (000)
- Total Household Liabilities
 - Total Household Liabilities
 - Total Household Liabilities (000)
 - Average (Avg) Total Household Liabilities
 - Average (Avg) Total Household Liabilities (000)
- Total Household Net Worth
 - Total Household Net Worth
 - Total Household Net Worth (000)
 - Average (Avg) Total Household Net Worth
 - Average (Avg) Total Household Net Worth (000)
- Total Contact Assets
 - Total Assets
 - Total Assets (000)
 - Average (Avg) Total Assets
 - Average (Avg) Total Assets (000)
- Total Contact Expenses
 - Total Expenses
 - Total Expenses (000)
 - Average (Avg) Total Expenses
 - Average (Avg) Total Expenses (000)
- Total Contact Income
 - Total Income
 - Total Income (000)
 - Average (Avg) Total Income

- Average (Avg) Total Income (000)
- Total Contact Liabilities
 - Total Liabilities
 - Total Liabilities (000)
 - Average (Avg) Total Liabilities
 - Average (Avg) Total Liabilities (000)
- Total Contact Net Worth
 - Total Net Worth
 - Total Net Worth (000)
 - Average (Avg) Total Net Worth
 - Average (Avg) Total Net Worth (000)
- Household Custom Metrics
 - Indexed Number
 - Average (Avg) Indexed Number
 - Indexed Currency
 - Average (Avg) Indexed Currency
- Number (#) of Rolled Up Contacts
- Number (#) of Rolled Up Service Requests
- Number (#) of Rolled Up Leads
- Number (#) of Contacts
- Number (#) of Contact Service Requests
- Number (#) of Contact Leads
- Number (#) of Households
- Lead Metrics
 - Number (#) of Leads
 - Number (#) of Qualified Leads
 - Number (#) of Rejected Leads
 - Number (#) of Archived Leads
 - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
 - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
 - Number (#) of Leads Resulting in Lost Opportunity

- Number (#) of New Opportunities
- Number (#) of Wins
- Closed Revenue for Lead
- Expected Revenue for Lead
- Opportunity Revenue for Lead
- Opportunity Metrics
 - Opportunity Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Revenue
 - Expected Revenue
 - Closed Revenue
 - Revenue (000)
 - Expected Revenue (000)
 - Closed Revenue (000)
 - Number (#) of Opportunities
 - Number (#) of Open Opportunities
 - Number (#) of Closed Opportunities
 - Number (#) of Wins
 - Average Number (Avg #) of Days in Stage
- Partner Metrics
 - Partner Custom Metrics
 - Average (Avg) Indexed Currency
 - Average (Avg) Indexed Number
 - Indexed Currency
 - Indexed Number
 - Number (#) of Partners
- Service Request Metrics
 - Service Request Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number

- Average (Avg) Indexed Number
- Number (#) of Service Requests (SRs)
- Number (#) of Open SRs
- Number (#) of Closed SRs
- Number (#) of Pending SRs
- Number (#) of Cancelled SRs
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR
- Custom Object Metrics (These metrics are repeated for custom objects 1 through 15.)
 - Custom Object Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Number (#) of Custom Object

Usage Notes

Reports with no results can occur due to several reasons. One reason is the lack of a metric in the report. Your report must contain at least one metric.

You can also get a report with no results if you are using two custom objects that are not directly linked to each other. For example, if an Account object is directly associated to Custom Object 4 and Custom Object 5, then you can report on the association between Account and Custom Object 4 as well as the association between Account and Custom Object 5. However, you cannot report on the combined association among Account, Custom Object 4, and Custom Object 5 unless there is a direct association between Custom Object 4 and Custom Object 5 defined in the application.

Taking this example further, if an Account object is directly associated to Custom Object 4 and Custom Object 4 is directly associated to Custom Object 5, then you can report on the association between Account and Custom Object 4 as well as the association between Custom Object 4 and Custom Object 5. However, the combined association between Account, Custom Object 4, and Custom Object 5 cannot be reported on unless there is a direct association between Account and Custom Object 5 as defined in the application.

Assets Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze asset metrics by account, asset, and product dimensions. It allows you to track assets and products that were sold to a customer or company. This is one of the few subject areas where the visibility to the asset records is based on the visibility of the associated account records.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Asset
- Product

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Asset

Metrics

The complete list of metrics for this subject area is as follows:

- Asset Metrics
 - Number (#) of Assets
 - Average Number (Avg #) of Assets

Usage Notes

None

Business Planning Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to look at accounts, contacts, opportunities, and products within the context of business plans, objectives, plan types, periods, revenue goals, and units of measure. It also provides the ability to review actual performance compared to goals and objectives established within business plans. Results can be combined with queries from other subject areas for comparing the results with the target goals.

Relationship Type

One to many

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Business Plan
- Contact
- Lead
- Objective
- Opportunity
- Period
- Plan Account
- Plan Contact
- Plan Opportunity
- Principal Partner Account
- Product
- Service Request

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type

field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Activity
- Contact
- Lead
- Opportunity
- Service Request

Metrics

The list of metrics for this subject area is as follows:

- Account Metrics
- Activity Metrics
- Business Plan Metrics
- Contact Metrics
- Lead Metrics
- Objective Metrics
- Opportunity Metrics
- Partner Metrics
- Period Metrics
- Plan Account Metrics
- Plan Contact Metrics
- Plan Opportunity Metrics
- Service Request Metrics

Usage Notes

This subject area has multiple dimensions, but you must use care not to mix dimensions indiscriminately. Not all combinations of dimensions yield useful results. The following list shows the driving-object dimension in bold font and which dimensions can be combined with it to produce valid results.

- **Account:** Objective, Plan Account
- **Activity:** Business Plan, Objective
- **Business Plan:** Activity, Objective, Partner, Period, Plan Account, Plan Contact, Plan Opportunity, Product
- **Contact:** Objective, Plan Contact

- **Lead:** Objective
- **Objective:** Account, Activity, Business Plan, Contact, Lead, Opportunity, Period, Product, Service Request
- **Opportunity:** Objective, Plan Opportunity
- **Partner:** Business Plan
- **Period:** Business Plan, Objective
- **Plan Account:** Account, Business Plan
- **Plan Contact:** Business Plan, Contact
- **Plan Opportunity:** Business Plan, Opportunity
- **Product:** Business Plan, Plan Contact
- **Service Request:** Objective

Note: When mixing dimensions in a report make sure to include metrics from these dimensions so that Oracle CRM On Demand can make the correct joins. For example, if the driving dimension is Objective and you want to use some Contact fields, then you must also include an objective metric in your query. You can suppress the printing of the metric, but it must be in the query.

Campaigns Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables the comprehensive analysis of campaigns by campaign, user, and date dimensions. It allows you to analyze campaign results, performance, and return on investment (ROI). It also contains metrics to help you to solve problems in achieving campaign goals and optimizing future campaigns.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Campaign
- Date
- Owned By User

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Campaign dimension has the Campaign Type field. There is also a Campaign Type Code field, which is the optimized version of the Campaign Type field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimension in this subject area has optimized filtering fields:

- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Campaign Metrics
 - Number (#) of Campaigns
 - Number (#) of Campaigns Planned
 - Number (#) of Campaigns Active
 - Number (#) of Campaigns Completed
 - Number (#) of Accounts for Campaign
 - Number (#) of Contacts for Campaign
 - Number (#) of Leads for Campaign
 - Number (#) of Opportunities for Campaign
 - Number (#) of Wins for Campaign
 - Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)
 - Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)
 - Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 100, then divided by the revenue target.)
 - Average (Avg) Days to Close Opportunity (Opty) for Campaign
 - Cost per Closed Sale (Definition: The cost divided by the number of wins.)
 - Average (Avg) Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)
 - Cost per Lead (Definition: The cost divided by the number of leads.)
 - Average (Avg) Cost Per Lead (Definition: The average cost divided by the number of leads.)
 - Lead Conversion Rate for Campaign
 - Closed Revenue for Campaign
 - Opportunity Revenue for Campaign
 - Average (Avg) Closed Revenue for Campaign
 - Opportunity Win Rate for Campaign
 - ROI

Usage Notes

None

Contact Relationships Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Relationship Reporting subject area provides the ability to analyze contact relationships. You can analyze contact relationships by account, contact, and related contact. This subject area has no metrics.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Related Contact
- Owned By User

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Contact

Metrics

None

Usage Notes

None

Contacts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

You can use this subject area to report on contact metrics by contact, account, campaign, owned by user, and date dimensions. The level of detail for this subject area is one row for each contact created in Oracle CRM On Demand. This subject area allows you to quickly answer questions such as the following: Who are the top ten employees with the largest contacts? Which accounts do not have any contacts? Which are the largest campaigns by contacts?

Relationship Type

Simple Multi-fact

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Contact
- Owned By User
- Date Created

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Metrics
 - Contact Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Number (#) of Contacts

Usage Notes

None

Custom Objects and Accounts Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Accounts
- Custom Object 2 and Accounts
- Custom Object 3 and Accounts

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyze the many-to-many relationship between accounts and Custom Objects 1, 2, and 3. The account subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with accounts. Because this subject area represents the many-to-many relationship between accounts and Custom Objects 1, 2, and 3, the accounts that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Dimensions

These subject areas have the following dimensions:

- Account
- Campaign
- Custom Object
- Date Created
- Owned By User
- Territory

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign
- Custom Object 1
- Custom Object 2
- Custom Object 3

Metrics

The complete list of metrics for these subject areas is as follows:

- Account Metrics
 - Account Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Revenue
 - Revenue (000)
 - Average (Avg) Revenue
 - Closed Revenue
 - Closed Revenue (000)
 - Average (Avg) Closed Revenue
 - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

- Number (#) of Accounts
- Number (#) of Accounts with Opportunities
- Number (#) of Contacts
- Number (#) of Opportunities
- Number (#) of Wins
- Number (#) of Service Requests (SRs)
- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR

Usage Notes

None

Custom Objects and Contacts Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Contacts
- Custom Object 2 and Contacts
- Custom Object 3 and Contacts

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyze the many-to-many relationship between contacts and Custom Objects 1, 2, and 3. The contact subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with contacts. Because this subject area represents the many-to-many relationship between contacts and Custom Objects 1, 2, and 3, contacts that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Dimensions

These subject areas have the following dimensions:

- Custom Object
- Account
- Campaign
- Contact
- Owned By User
- Date Created

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign
- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3

Metrics

The complete list of metrics for these subject areas is as follows:

- Contact Metrics
 - Contact Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Number (#) of Contacts

Usage Notes

None

Custom Objects and Opportunities Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Opportunities
- Custom Object 2 and Opportunities
- Custom Object 3 and Opportunities

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyze the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3. The opportunities subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with opportunities. Because this subject area represents the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3, the opportunities that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Dimensions

These subject areas have the following dimensions:

- Custom Object
- Account
- Campaign
- Opportunity
- Primary Contact
- Territory
- Owned By User
- Date Opened
- Close Date

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field.

Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign
- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Opportunity

Metrics

The complete list of metrics for these subject areas is as follows:

- Opportunity Metrics
 - Opportunity Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Revenue
 - Expected Revenue
 - Closed Revenue
 - Revenue (000)
 - Expected Revenue (000)
 - Closed Revenue (000)
 - Number (#) of Opportunities
 - Number (#) of Open Opportunities
 - Number (#) of Closed Opportunities
 - Number (#) of Wins
 - Average Number (Avg #) of Days in Stage

Usage Notes

None

Custom Objects and Service Requests Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Service Requests
- Custom Object 2 and Service Requests
- Custom Object 3 and Service Requests

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyze the many-to-many relationship between service requests and Custom Objects 1, 2, and 3. The service requests subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with service requests. Because this subject area represents the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3, the service requests that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-Many

Dimensions

These subject areas have the following dimensions:

- Custom Object
- Account
- Contact
- Service Request
- Owned By User
- Date Opened
- Date Closed

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using

the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Service Request

Metrics

The complete list of metrics for these subject areas is as follows:

- Service Request Metrics
 - Service Request Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Number (#) of Service Requests (SRs)
 - Number (#) of Open SRs
 - Number (#) of Closed SRs
 - Number (#) of Pending SRs
 - Number (#) of Cancelled SRs
 - Average (Avg) Open SR Age
 - Average (Avg) Days to Close SR

Usage Notes

None

Custom Objects Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1
- Custom Object 2
- Custom Object 3

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to report on Custom Objects 1, 2, and 3 metrics by account, activity, campaign, contact, lead, opportunity, service request, partner, date, and Custom Objects 1, 2, and 3 dimensions. They offer the ability to analyze Custom Objects 1, 2, and 3 metrics by various related objects. The reporting of Custom Objects 1, 2, and 3 is currently available only in real time. When analyzing Custom Objects 1, 2, and 3, use only these subject areas.

Relationship Type

Simple

Dimensions

These subject areas have the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Created Date
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Lead
- Opportunity
- Owned By User
- Partner (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Service Request

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account

- Activity
- Campaign
- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Lead
- Opportunity
- Service Request

Metrics

The complete list of metrics for these subject areas is as follows:

- Custom Object Metrics
 - Custom Object Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Number (#) of Custom Objects

Usage Notes

None

Forecasts Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the data generated by the Oracle CRM On Demand Forecast Module. It also allows you to compare the forecasting summary with the latest real-time opportunity data by account, territory, user, opportunity, product, date, and user quota dimensions. You can create a performance report for a sales team, showing the pipeline coverage, quota attainment, and forecast accuracy. It also allows sales managers to monitor the performance of individual team members, using the user hierarchy.

Relationship Type

Multi-Fact

Dimensions

This subject area has the following dimensions:

- Account
- Account Revenue (see Note 1)
- Account Territory
- Book
- Close Date (see Note 2)
- Contact
- Forecast
- Forecast Date (see Note 3)
- Opportunity (see Note 4)
- Opportunity Product Revenue (see Note 4)
- Owned By User
- Product
- Product Category
- Quota

Note 1: You cannot combine the Account Revenue dimension with the Opportunity or the Opportunity Product dimensions.

Note 2: For quotas, the close date is the first day of the month for the quota period. For forecasts, the close date is the closed date for the opportunities that are in the forecast snapshots. For opportunities, the closed date is the closed date for the opportunity.

Note 3: The forecast date is the date when the forecast was run. An opportunity can be in multiple forecasts.

Note 4: Opportunity and Opportunity Product Revenue can be associated only with the Opportunity and Opportunity Product Revenue metrics.

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Contact

- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Account Revenue Metrics
 - Number (#) of Products
 - Average Number (Avg #) of Products
- Forecast Metrics
 - My Account Revenues
 - My Account Revenue
 - My Contact Revenues
 - My Contact Revenue
 - My Opportunities
 - My Opportunity Revenue
 - My Product Revenues
 - My Product Revenue
 - My Products
 - Closed Quantity
 - Closed Revenue
 - Expected Revenue
 - Forecasted Quantity
 - Pipeline Quantity
 - Team Summary
 - Forecast
 - Closed Revenue
 - Pipeline
 - Best Case
 - Team Product Summary
 - Closed Quantity
 - Forecasted Quantity
 - Pipeline Quantity
 - Closed Revenue
 - Expected Revenue

Reports

- Closed Revenue
- Pipeline
- Forecast
- Expected Revenue
- Best Case
- Quota Metrics
 - Quota Value
- Opportunity Metrics
 - Opportunity Custom Metrics
 - Indexed Number
 - Average (Avg) Indexed Number
 - Indexed Number
 - Average (Avg) Indexed Number
 - Revenue
 - Expected Revenue
 - Closed Revenue
 - Revenue (000)
 - Expected Revenue (000)
 - Closed Revenue (000)
 - Number (#) of Opportunities
 - Number (#) of Open Opportunities
 - Number (#) of Closed Opportunities
 - Number (#) of Wins
 - Average Number (Avg #) of Days in Stage
- Opportunity Product Revenue Metrics
 - Number (#) of Products
 - Average Number (Avg #) of Products

Usage Notes

The following restrictions apply:

- **Multi-Fact.** Because the Forecasts subject area is a Multi-Fact subject area, you must ensure there is only one metric as part of a report.
- **Book dimension.** The book dimension and hierarchy allow you to group data records into books. But the data that you can see is still governed by your visibility mode in Analytics. It works only with account, account revenue, opportunity, and opportunity-product.

- **Hierarchies.** All hierarchies are limited to eight levels.
- **Revenue Split.** When the revenue split feature is configured (see [Setting Up Your Company Profile and Global Defaults](#) (on page 996)), the forecast summary reflects the split, but the real-time opportunity metrics do not.
- **Quota Metrics.** Comparing quota metrics to other metrics is only valid at the month level and user level.
- **Forecast summary custom fields.** These fields are not available for reporting. The forecast summary generated by Oracle CRM On Demand contains rolled-up totals. Therefore, the forecast metrics in your report make sense only if you view the data by user. Viewing the forecast metrics without the user causes the value to appear incorrect.
- **Opportunity and multiple forecasts.** The same opportunity can appear in multiple forecasts. Therefore, forecast metrics must be viewed by a specific date, using the filtered-metric mechanism. Without doing this, the forecast metrics might appear incorrect.
- **Forecast and user quota metrics.** The data for revenues is the same as the forecast summary date, so all opportunities appear to be on the first day of the month. The user quota is also set for a monthly period and appears on the first day of the month. For this reason, reports that include forecast and user quota metrics make sense only if the data is aggregated for the month or at a higher level.
- **User quota metrics.** Visibility to user quota metrics is controlled using the Manager visibility regardless of the user's visibility. Hence, it is not possible for users who are not company administrators to report user quotas along with opportunity metrics when their visibility is set to Team visibility.
- **User's percentile ranking.** You cannot build a user's percentile ranking without having access to all the underlying data.
- **Calendar month and multiple forecasts.** Each calendar month can have multiple forecasts. So, a report showing the total forecast metrics must be qualified by a specific forecast date.
- **Quota and Revenue.** If your report showing the user quota and real-time opportunity revenue does not show the expected results, then it could be because there are no records that have opportunity closed dates in the same period as the quota records.
- **Monthly Forecast.** Your monthly forecast summary totals are already rolled up. So, a total for all users gives incorrect results. If you want to obtain the total this way, you must use the revenue metrics from the My Revenues folder.
- **Analytics Manager Visibility.** Use Analytics Manager Visibility if the forecast includes only people who report to you.
- **Analytics Team Visibility.** Use the Analytics Team Visibility if those people in the forecast are part of your team. If the people in the forecast are neither in your team, nor reporting to you, then the opportunity and opportunity product view does not match the forecast summary.
- **Forecast metrics.** The forecast metrics must reference a specific forecast. Use the FILTER metric function to reference the metrics by forecast date and forecast type. For example, use the FILTER metric function to obtain the forecast value for a specific forecast date, such as Sep 16, 2009. Because there are multiple forecast types, add a further filter to get only the values for Opportunity Revenue Forecast. For example:


```
FILTER ("Forecast Metrics"."Forecast Revenue" USING ("Forecast Date.Date = date '2009-09-16'
AND Forecast."Forecast Type" = 'Opportunity Revenue Forecast'))
```

Using the FILTER metric function is not the same as adding a filter to the report. If you add a report filter to the filter by Forecast Date and Forecast Type, you do not get any values for the user quota or real-time revenue. If you have multiple quotas defined for each user, you must use the FILTER metric function to reference the specific quota value. For example:

```
FILTER("Quota Metric"."Quota Value" USING (Quota."Quota Name" = 'Sales'))
```

In this example, the FILTER metric function obtains the quota value for a specific quota name (Sales). Without this filter metric, you get only the total value of all the quotas.

Households Reporting Subject Area

Availability

This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose

The Households Reporting subject area provides the ability to generate reports on households for the Contact dimension. This report enables advisors and their managers to answer questions, such as the following:

- Which of my clients belong to which households?
- How are the household assets in my book of business divided among my clients?
- What are my top households by total asset value?

You can combine household reports with portfolio reports to provide an enhanced client service by understanding clients as members of a household.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Household
- Contact
- Household Contact

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Contact dimension has a Contact Type field. There is also a Contact Type Code field, which is the optimized version of the Contact Type field. Similarly, there is a Created Date UTC field, which is the optimized version of the Created Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimension in this subject area has optimized filtering fields:

- Contact

Metrics

The complete list of metrics for this subject area is as follows:

- Household Metrics
 - Total Household Assets
 - Total Household Assets
 - Total Household Assets (000)
 - Average (Avg) Total Household Assets
 - Average (Avg) Total Household Assets (000)
 - Total Household Expenses
 - Total Household Expenses
 - Total Household Expenses (000)
 - Average (Avg) Total Household Expenses
 - Average (Avg) Total Household Expenses (000)
 - Total Household Income
 - Total Household Income
 - Total Household Income (000)
 - Average (Avg) Total Household Income
 - Average (Avg) Total Household Income (000)
 - Total Household Liabilities
 - Total Household Liabilities
 - Total Household Liabilities (000)
 - Average (Avg) Total Household Liabilities
 - Average (Avg) Total Household Liabilities (000)
 - Total Household Net Worth
 - Total Household Net Worth
 - Total Household Net Worth (000)
 - Average (Avg) Total Household Net Worth
 - Average (Avg) Total Household Net Worth (000)
 - Total Contact Assets
 - Total Assets
 - Total Assets (000)
 - Average (Avg) Total Assets
 - Average (Avg) Total Assets (000)
 - Total Contact Expenses

- Total Expenses
- Total Expenses (000)
- Average (Avg) Total Expenses
- Average (Avg) Total Expenses (000)
- Total Contact Income
 - Total Income
 - Total Income (000)
 - Average (Avg) Total Income
 - Average (Avg) Total Income (000)
- Total Contact Liabilities
 - Total Liabilities
 - Total Liabilities (000)
 - Average (Avg) Total Liabilities
 - Average (Avg) Total Liabilities (000)
- Total Contact Net Worth
 - Total Net Worth
 - Total Net Worth (000)
 - Average (Avg) Total Net Worth
 - Average (Avg) Total Net Worth (000)
- Household Custom Metrics
 - Indexed Number
 - Average (Avg) Indexed Number
 - Indexed Currency
 - Average (Avg) Indexed Currency
- Number (#) of Rolled Up Contacts
- Number (#) of Rolled Up Service Requests
- Number (#) of Rolled Up Leads
- Number (#) of Contacts
- Number (#) of Contact Service Requests
- Number (#) of Contact Leads
- Number (#) of Households

Usage Notes

None

Leads Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze lead metrics by account, account territory, campaign, contact, date, lead, opportunity, owned by user, and principal partner account. This subject area contains metrics to analyze lead quality, lead conversion, and revenues associated with leads.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Contact
- Lead
- Opportunity
- Owned By User
- Date
- Principal Partner Account

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account

Reports

- Campaign
- Contact
- Lead
- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Lead Metrics
 - Account Territory Hierarchy
 - Top Level Territory Name
 - Level 8 Territory Name
 - Level 7 Territory Name
 - Level 6 Territory Name
 - Level 5 Territory Name
 - Level 4 Territory Name
 - Level 3 Territory Name
 - Level 2 Territory Name
 - Level 1 Territory Name
 - Number (#) of Leads
 - Number (#) of Qualified Leads
 - Number (#) of Rejected Leads
 - Number (#) of Archived Leads
 - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
 - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
 - Number (#) of Leads Resulting in Lost Opportunity
 - Number (#) of New Opportunities
 - Number (#) of Wins
 - Closed Revenue for Lead
 - Expected Revenue for Lead
 - Opportunity Revenue for Lead

Usage Notes

None

Opportunities Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze opportunities by account, territory, campaign, contact, territory, owner, and date dimensions. This subject area is a multi-fact subject area that includes opportunity and quota metrics. Opportunity metrics are defined at the most granular level in this subject area, and hence, can be analyzed by every possible dimension. However, Quota metrics are at less granular level and can be analyzed only by limited dimensions including Date (Month), Quota, Owner.

Relationship Type

Simple

Dimensions

- Account
- Account Territory
- Campaign
- Opportunity
- Primary Contact
- Territory
- Owned By User
- Date Opened
- Close Date
- Quota
- Principal Partner Account

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using

Reports

the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign
- Contact
- Opportunity

Metrics

The following are the key metrics in this subject area:

- Revenue (Expected and Closed)
- Number (#) of Opportunities (Open and Closed)
- Number (#) of Wins
- Quota amounts

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
 - Opportunity Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Revenue
 - Expected Revenue
 - Closed Revenue
 - Revenue (000)
 - Expected Revenue (000)
 - Closed Revenue (000)
 - Number (#) of Opportunities
 - Number (#) of Open Opportunities
 - Number (#) of Closed Opportunities
 - Number (#) of Wins
 - Average Number (Avg #) of Days in Stage
- Quota Metrics
 - Quota Value

Usage Notes

Because quota metrics are not defined at the Opportunity dimension level, these metrics are displayed as empty cells when Opportunity dimension attributes are on the report.

Opportunities and Competitors Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the many-to-many relationship between opportunities and competitor accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the competitor account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports to show all the competitors for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and competitor accounts, the opportunities that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Opportunity Competitor
- Relationship Contact
- Account
- Account Territory

- Campaign
- Opportunity
- Primary Contact
- Territory
- Owned By User
- Date Opened
- Close Date

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign
- Contact
- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
 - Opportunity Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Revenue
 - Expected Revenue
 - Closed Revenue
 - Revenue (000)
 - Expected Revenue (000)
 - Closed Revenue (000)
 - Number (#) of Opportunities

- Number (#) of Open Opportunities
- Number (#) of Closed Opportunities
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage

Usage Notes

None

Opportunities and Partners Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the many-to-many relationship between opportunities and partner accounts. It is almost identical to the opportunity subject areas. The only difference is that it includes the partner account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the partners for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and partner accounts, the opportunities that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Opportunity Partner
- Relationship Contact
- Account
- Account Territory
- Campaign
- Opportunity
- Primary Contact
- Territory
- Owned By User
- Date Opened
- Close Date

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign
- Contact
- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
 - Opportunity Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Revenue

- Expected Revenue
- Closed Revenue
- Revenue (000)
- Expected Revenue (000)
- Closed Revenue (000)
- Number (#) of Opportunities
- Number (#) of Open Opportunities
- Number (#) of Closed Opportunities
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage

Usage Notes

None

Opportunity Product Revenues Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand

Business Purpose

This subject area allows you to analyze opportunity product revenues by account, account territory, campaign, opportunity, opportunity product, owned by user, product, and product category. Because each recurring product revenue record might have a different start date, the level of detail for this subject area is at the lowest level and contains one row for each recurring product revenue record within the opportunity. Given the level of detail for this subject area, it provides the utmost flexibility to roll up data at any level of the supported dimensions. This subject area also contains the quota dimension and metrics, which allow you to report both opportunity product revenue and quota metrics in the same report.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory

Reports

- Campaign
- Opportunity
- Product Category
- Product
- Opportunity-Product
- Owned By User
- Quota

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Campaign
- Opportunity

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity-Product Metrics
 - Number (#) of Products
 - Average (Avg) Number (#) of Products
- Quota Metrics
 - Quota Value

Usage Notes

None

Opportunity Team Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the relationship between opportunities and opportunity teams. Use this subject area to query for team members involved in an opportunity. This subject area has no metrics.

Relationship Type

One-to-Many.

Dimensions

This subject area offers the following dimensions:

- Opportunity
- Opportunity Team
- Owned By User

Metrics

None.

Usage Notes

None.

Data Visibility. This subject area always uses the Team Visibility mode, regardless what settings you defined in your profile. For that reason, you can always report on all the opportunities where you are either the owner or a team member.

Partners Reporting Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Partners Reporting subject area provides the ability to analyze partners and measure important performance metrics, including the number of qualified leads and total revenue in the opportunity pipeline.

Relationship Type

Summary

Dimensions

This subject area has the following dimensions:

- Date Created
- Owned By User
- Partner
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Partner Metrics
- Partner Custom Metrics
 - Average (Avg) Indexed Currency
 - Average (Avg) Indexed Number
 - Indexed Currency
 - Indexed Number
- Number (#) of Partners
- Number (#) of Archived Leads
- Number (#) of Cancelled Service Requests (SRs)
- Number (#) of Closed Opportunities
- Number (#) of Closed SRs
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Leads Resulting in Won Opportunity
- Number (#) of Open Opportunities
- Number (#) of Open SRs
- Number (#) of Opportunities
- Number (#) of Pending SRs
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads
- Number (#) of SRs
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage
- Average (Avg) Days to Close SR

- Average (Avg) Open SR Age
- Closed Revenue
- Closed Revenue (000)
- Closed Revenue for Lead
- Expected Revenue for Lead
- Opportunity Revenue for Lead
- Revenue
- Revenue (000)

Usage Notes

The previous metrics are based on the Principal Partner Account of Leads, Opportunities, and Service Requests.

Personalized Content Delivery Reporting Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Life Sciences Edition.

Business Purpose

This subject area provides the information required by various roles in a pharmaceutical organization to better understand physicians, refine content, and deliver the right message to the right person at the right time. For example, a marketing manager can analyze detailing trends, collateral performance, and responses from various segments. With this information, the manager can revise collateral or segment the customer base again, and then target customers accordingly. A sales manager can analyze the detailing trends, looking for good and bad performers in a territory, and so coach the team, as needed.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Contact
- Message Response

- Messaging Plan
- Messaging Plan Item
- Product

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Activity
- Contact

Metrics

The complete list of metrics for this subject area is as follows:

- Messaging Plan Metrics
 - Messaging Plan Custom Metrics
 - Average (Avg) Indexed Currency
 - Indexed Currency
 - Average (Avg) Indexed Number
 - Indexed Number
 - Number (#) of Messaging Plans
- Messaging Plan Item Metrics
 - Messaging Plan Item Custom Metrics
 - Average (Avg) Indexed Currency
 - Indexed Currency
 - Average (Avg) Indexed Number
 - Indexed Number
 - Number (#) of Messaging Plan Items
- Message Response Metrics
 - Messaging Response Custom Metrics
 - Average (Avg) Indexed Currency
 - Indexed Currency

- Average (Avg) Indexed Number
- Indexed Number
- Number (#) of Messaging Responses
- Account Metrics
 - Revenue
 - Revenue (000)
 - Average (Avg) Revenue
 - Closed Revenue
 - Closed Revenue (000)
 - Average (Avg) Closed Revenue
 - Average (Avg) Days to Close Opportunity
 - Potential Revenue
 - Average (Avg) Potential Revenue
 - Revenue
 - Product Revenue (000)
 - Product Closed Revenue
 - Product Closed Revenue (000)
 - Number (#) of Accounts
 - Number (#) of Accounts with Opportunities
 - Number (#) of Activities
 - Number (#) of Contacts
 - Number (#) of Opportunities
 - Number (#) of Wins
 - Number (#) of Service Requests (SRs)
 - Number (#) of Cancelled SRs
 - Number (#) of Closed SRs
 - Number (#) of Open SRs
 - Number (#) of Pending SRs
 - Average (Avg) Open SR Age
 - Average (Avg) Days to Close SR
 - Number (#) of Leads
 - Number (#) of Leads Converted to Opportunities
 - Number (#) of Leads Resulting in Won Opportunity
 - Number (#) of Leads Resulting in Lost Opportunity

Reports

- Number (#) of Qualified Leads
- Number (#) of Rejected Leads
- Activity Metrics
 - Number (#) of Activities
 - Number (#) of Open Activities
 - Number (#) of Accounts with Activities
 - Number (#) of Closed Activities
- Contact Metrics
 - Contact Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Owned By User Custom Fields
 - Owned By User Custom Fields
 - Number (#) of Contacts
- Product Revenue Metrics
 - Revenue
 - Product Expected Revenue
 - Product Closed Revenue
 - Product Revenue (000)
 - Product Expected Revenue (000)
 - Product Closed Revenue (000)
 - Average (Avg) Purchase Price
 - Average (Avg) Quantity
 - Quantity

Usage Notes

None

Service Requests Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze service requests by account, contact, service request, user, partner, and date dimensions. It helps you to measure and analyze important performance metrics of the customer service request organization, including how long service requests have been open and the average duration to close them. Using these performance metrics for service requests can help your company to improve customer satisfaction, employee productivity, and reduce operational costs.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Date Closed
- Date Opened
- Owned By User
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Service Request

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is a Last Call Date UTC field, which is the optimized version of the Last Call Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Contact
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Service Request Metrics
 - Service Request Custom Metrics
 - Indexed Currency
 - Average (Avg) Indexed Currency
 - Indexed Number
 - Average (Avg) Indexed Number
 - Number (#) of Service Requests (SRs)
 - Number (#) of Open SRs
 - Number (#) of Closed SRs
 - Number (#) of Pending SRs
 - Number (#) of Cancelled SRs
 - Average (Avg) Open SR Age
 - Average (Avg) Days to Close SR

Usage Notes

None

Shared Activities Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze shared activities by account, contact, and user dimensions. Because these activities can be shared by one or more users in Oracle CRM On Demand, using this subject area you can report shared activities. Activities that are not shared with at least one user cannot be reported using this subject area.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Contact
- Owned By User

Optimized Filtering Fields

This subject area has fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. The following dimensions in this subject area have optimized filtering fields:

- Account
- Activity
- Contact

Metrics

None

Usage Notes

None

Changing the Appearance of Reports

When setting up or updating reports in Oracle CRM On Demand Answers, you can change the visual appearance of reports, known as cosmetic formatting. You can apply cosmetic formatting, copy and paste cosmetic formatting attributes, and save a formatted report to use as a style template.

Depending on the item you are formatting, the dialog box displays different options, such as font, cell, and border controls, background color, additional formatting options such as cell padding, and custom CSS style options for HTML.

You can change the appearance of:

- Columns and sections, such as background color and borders
- Columns in tables
- Size of titles

You can copy the range of cosmetic formatting attributes that you apply to an item, such as a column in a table, and paste them to an item of the same type, such as another column in the table or a column in a different table. You can also restore the default appearance. To do this, use the icons at the top right of the dialog boxes.

Views that support copying and pasting include the table, pivot table, and chart views.

About Saving Reports as Style Templates

After you have customized the cosmetic appearance of a report and saved it, you can use it as a template. This allows you to apply the formatting from the saved report to new or existing reports.

Views that support the use of a saved report as a template include the table, pivot table, and chart views.

This topic contains information about performing the following tasks:

- Formatting the visual appearance of a report
- Copying and pasting a formatting attribute
- Restoring the default appearance of an attribute
- Using a saved report as a template

To format the visual appearance of a report

- 1 In Oracle CRM On Demand, click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.
- 3 In Oracle CRM On Demand Answers, click Open Analysis.
- 4 Select the report that you want to work with, then click OK.
- 5 In the Build and View Analyses page, open the cosmetic format dialog box by doing one of the following:
 - In Step 1, click the Column Properties button, and then click the Style tab in the Column Properties dialog box.
 - In Step 2, open the Edit Format dialog box by doing one of the following:
 - For Title or Table, click the Format View button.
 - In the pivot table view, click the Pivot Table View Properties button and then the Set alternate format button.

NOTE: In the table view, you can also click the format column button and use the Value Format tab. In the pivot table view, you can also click the section properties button and use the Section Properties tab.

The cosmetic format dialog box appears.

- 6 In the Font area, make your selections for the font family, size, color, style (such as bold), and any effects that you want to apply (such as underlining).

NOTE: For some items, this option is not available.

- 7** In the Cell area, set up the alignment and background color.

NOTE: For horizontal alignment, the most common justification for text data is left. For numeric data, the most common justification is right.

Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

- 8** In the Border area, make your selections for the border position, color, and style of the cell.

TIP: You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position drop-down list.

- 9** To format spacing within the cell, click Additional Formatting Options and specify values for the width and height of the cell contents, and the space above, below, left and right of the contents.

Values are specified in pixels.

- 10** To override the style and class elements specified in Oracle CRM On Demand Answers style sheets, make your selections in the Custom CSS Style Options area:

a Click the settings that you want to use.

b Provide the location of the class, style, or style sheet.

NOTE: The advanced style formatting options are for users who know how to work with cascading style sheets.

- 11** Click OK.

To copy and paste a formatting attribute

- 1** In the Build and View Analysis page, go to the item whose formatting you want to copy, such as a row, column, or table cell.
- 2** Open the Cosmetic Formatting dialog box, click the Copy Formatting button, then click Cancel to close the Cosmetic Formatting dialog box.
- 3** Go to the item to which you want to paste the formatting.
- 4** Open the cosmetic formatting dialog box, click the paste formatting button, then click OK to apply your changes.

To restore the default appearance

- Open the Cosmetic Formatting dialog box for the item, and then click the Clear Formatting button.

For some types of views, when you add the view, you can use a saved report as a template, as described in the following procedure.

To use a saved report as a template

- 1 In the Build and View Analysis page, go to Step 2 Create Layout.
- 2 Click Add View, and select the view that you want.
- 3 Click the Import View Formatting From Another Analysis button, which is near the top of the workspace:



- 4 In the Import Saved Format dialog box, navigate to the saved report, and click OK.
- 5 Click either the Saved Results link or the Preview Analyses button.

Step 1: Defining Criteria

You define the criteria for your reports in the Define Criteria page in Oracle CRM On Demand Answers. To access the Define Criteria page, either create a new analysis, as described in [Getting Started with Answers \(Custom Reports\)](#) (on page 698), or open an existing analysis in Oracle CRM On Demand Answers.

Click a topic to see step-by-step instructions to do the following:

- [Adding Columns to Reports](#) (on page 834)
- [Adding Custom Fields to Reports](#) (on page 835)
- [Adding Filters to Columns](#) (on page 835) (optional but recommended)
- [Editing Column Properties](#) (on page 843)
- [Setting Up Column Formulas](#) (on page 854)
- [Adding Action Links to Results](#) (on page 855) (optional)
- [Sorting and Reordering Columns](#) (on page 858)

Related Topics

See the following topics for related information:

- [About Using Addresses in Reports](#) (on page 859)
- [Combining Results from Multiple Reports Using Set Operations](#) (on page 859)

Adding Columns to Reports

When creating or modifying reports in Oracle CRM On Demand Answers, you add columns until your report contains all the data that you want.

NOTE: The periods in your reports might be based on your company's fiscal calendar, which might be different from a standard calendar. For example, your company's fiscal year might begin on 1 June of each

calendar year. If your company has recently changed its fiscal calendar year in Oracle CRM On Demand, then you must review historical analyses carefully if they span multiple years. Data in reports that is based on your previous fiscal calendar cannot be aligned with data using a new fiscal calendar.

To add columns to your report

- 1 In Oracle CRM On Demand Answers, in the Active Subject Area section, expand the Column lists to display the columns that you can include in the reports.
- 2 Click the columns that you want to include in the report.

NOTE: You can remove a column from the report by clicking the X icon within that column. You can change the order of columns by dragging them to the new location and dropping them.

Adding Custom Fields to Reports

You can add custom fields as columns in reports and analyses in Oracle CRM On Demand Answers. For more information about adding columns to reports, see [Adding Columns to Reports](#) (on page 834).

For multilanguage deployments using Oracle CRM On Demand Answers, you must translate custom fields into each language that is used with Oracle CRM On Demand Answers, so that those fields are available to be added to reports and analyses. For example, if a custom field is created in English, it must be translated in to German, so that a German user can see, and then use the custom field in a report or an analysis.

Adding Filters to Columns

In Oracle CRM On Demand Answers, in the Define Criteria page, you can set up filters for columns in your report. A filter limits the results that appear when a report is run. Oracle CRM On Demand Answers shows only those results that match the criteria.

A column filter consists of the following elements:

- A column to filter, such as Account Type.
- A value to use when applying the filter, such as 10 (a SQL expression or a variable can be used instead of a value when necessary).
- An operator that determines how the value is applied, such as Less Than.

For example, if the column contains the quantity sold, the operator is Less Than, and the value is 10, the results include only order quantities where less than 10 units were sold.

A column filter can also have the following characteristics:

- It can be combined with other column filters from the same subject area to further constrain the results of a report.
- Filters can be grouped to create complex filters.
- Its value can be constrained by the results of a previously saved report from the same subject area.

The filter is translated into a WHERE clause in the SQL SELECT statement. The WHERE clause is used to limit the rows returned to those that fit the specified constraints. Advanced users can enter the SQL for a filter directly.

NOTE: If you selected the option to add new picklist values when importing data, those new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during that time period.

Creating Column Filters

You can create a filter for each column in your reports. If you do not want the column to display in results, you can hide it.

CAUTION: If you click your browser's Refresh button before you have finished creating a column filter, the browser reloads the page and discards your changes.

To create a column filter

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the New Filter button in the column where you want to create the filter.
- 2 In the Create/Edit Filter dialog box, select an operator from the Operator drop-down list.
The choices for operators and values appear in the left column. Depending on the type of column you select, additional options may appear in the right column, such as calendar buttons for specifying a date range, or a text-matching box for limiting long lists of values.
- 3 To specify a value, enter it in the Value box, or click All Choices to view the available values in the column, and select a value from the list.

Multiple values can be added by clicking Add and selecting Value after entering data for the current value field.

Use the guidelines shown in the following table when choosing an operator and specifying values.

Operator	Usage Guidelines
is equal to or is in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column matches the value in the filter.
is not equal to or is not in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column does not match the value in the filter.
is less than	Valid for a column that contains numbers or dates. Specify a single value. Results will include only records where the data in the column is less than the value in the filter.
is greater than	Valid for a column that contains numbers or dates. Specify a single value. Results will include only records where the data in the column is greater than the value in the filter.
is less than or equal	Valid for a column that contains numbers or dates. Specify a single

Operator	Usage Guidelines
to	value or multiple values. Results will include only records where the data in the column is less than or the same as the value in the filter.
is greater than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will include only records where the data in the column is greater than or the same as the value in the filter.
is between	Valid for a column that contains numbers or dates. Specify two values. Results will include records for both the specified values and the values in between them.
is null	<p>Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the absence of data in the column. The results include only records where there is no data in the column.</p> <p>Sometimes it might be useful to know whether any data is present, and using the IS NULL operator is a way to test for that condition.</p>
is not null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the presence of data in the column. Results will include only records where there is data in the column.
is in top	<p>Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only the first n records, where n is a whole number specified as the value in the filter.</p> <p>This operator is for ranked results. For example, you could use this operator to obtain a list of the top 10 performers.</p>
is in bottom	<p>Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only the last n records, where n is a whole number specified as the value in the filter.</p> <p>This operator is for ranked results. For example, you could use this to obtain a list of the customers reporting the fewest numbers of problems.</p>
contains all	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column contains all of the values in the filter.
contains any	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column contains at least one of the values in the filter.
does not contain	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column does not contain any of the values in the filter.
begins with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only records where the data in the column begins with the value in the filter.
ends with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only records where the data in the

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	column ends with the value in the filter.
is LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percentage symbol (%) as a wild card character. You may specify up to two percent sign characters in the value. Results will include only records where the data in the column matches the pattern value in the filter.
is not LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percentage symbol (%) as a wild card character. You may specify up to two percent sign characters in the value. Results will include only records where the data in the column does not match the pattern value in the filter.
is prompted	Valid for a column that contains text, numbers, or dates. Setting a column to <i>is prompted</i> flags it to be filtered by a value passed to it from another report. NOTE: Use this option when linking reports together through navigation (see Step 2: Creating Layouts (on page 860)). One or more columns in the report you drill into must contain the <i>is prompted</i> filter for that report to display rows limited to the value selected and drilled into from the parent report.

- 4 Use the paging controls to navigate the choices when there are many choices for the column:
 - Click on a specific page number to navigate to that page.
 - Click the double right-arrow paging button (>>) to advance to the last page or the double left-arrow paging button (<<) to go back to the first page.
- 5 Use the calendar buttons to specify the date range for columns that contain dates.
To specify a single date, specify the same date for the beginning and ending date.
- 6 Use the Match drop-down list to view the available values to use in a filter. If desired, specify criteria to constrain the values to be returned (this is not mandatory). Then click the All Choices link, and select a value from the list returned.

For example, suppose you want to see results for the East region. If you enter an E into the text box and select "begins with" from the Match drop-down list, the list shows only the values that begin with an E.
- 7 To add an SQL expression or a session variable, do the following:
 - a Click the Add button and select the appropriate option.
The label on the Value box changes to reflect your selection.
 - b Enter the SQL expression or session variable name into the box.

SQL expressions can contain function calls that operate on column values. For more information, see [Using Functions in Analyses](#) (on page 912) and [Session Variables](#) (on page 951).
- 8 To remove a value, SQL expression, or session variable, click the X icon next to it.

To remove all definitions, click the Clear Values button.

- 9** To have this filter constrained by the value of a column from the same subject area in another analysis, click the Advanced button and select the Filter based on results of another request option.

The Filter on Saved Request dialog box appears.

- 10** To convert the filter to SQL, click the Advanced button and select the Convert this filter to SQL option.

The Advanced SQL Filter dialog box appears.

- 11** When you are finished, click OK.

The filter appears in the Filters area on the Define Criteria page or on the Saved Filters page.

Saving Column Filters

You can save a filter as part of an analysis or for reuse in other analyses. If a filter is for a specific analysis and you save the analysis, the filter is saved as part of the analysis and will be applied every time the analysis runs. You can also save the filter explicitly so it can be used in other analyses.

Saved filters and folders containing filters for the subject area appear following the name of the subject area. If there are no saved filters for the subject area, this part of the page is blank.

To save a column filter as part of an analysis

- 1** In the Define Criteria page, click Save.
- 2** In the Save Analysis dialog box, select the location in which to save the analysis and then click OK.

To save a column filter for use in other analyses

- 1** In the Define Criteria page, in the Filters section, click Save Filter.
- 2** In the Save Filter dialog box, select a folder in which to save the filter:
 - To save the filter for your personal use, click My Filters.
Filters saved in My Filters are available only to you.
 - To save the filter for use by others, click Public Filters.
Filters saved in a public filters folder are available to other users that have permission to access the folder.
- 3** Enter a name for the filter.
- 4** (Optional) Enter a description for the filter.
- 5** Click OK.

To display the properties for a saved filter

- In the Define Criteria page, in the Filters section, click the Filter Options icon next to the filter whose properties you want to display, and then select the Edit Filter option.

Applying Saved Column Filters to Analyses

You can apply a saved column filter to an analysis. You can apply either the contents of the filter or a reference to the filter.

When you apply the contents of a saved column filter, the actual contents of that filter are copied into the Filters area on the Define Criteria page. This allows you to manipulate the filter criteria without altering the saved filter. When you apply a reference to a saved filter, the saved filter is referenced only by its name, and you can view but not alter its contents.

To apply a saved column filter to an analysis

- 1 In the Define Criteria page, in the Filters section, click Open Saved Filter.
- 2 Navigate to the appropriate Filters folder, select the saved filter that you want to apply, and then click OK.
- 3 In the Apply Saved Filter dialog box, in the Filter Options section, specify your choices, if any.
- 4 Click OK.

The filter appears in the Filters area on the Define Criteria page.

Editing Column Filters

You can edit a column filter to change its properties.

To edit a column filter

- 1 In the Define Criteria page, in the Filters section, click the Filter Options button for the filter you want to edit, and then select Edit Filter.

The Create/Edit Filter dialog box appears.

- 2 Make your changes, and then click OK.

Editing the Formula for a Column Filter

You can edit the formula for a column filter. The edits that you make apply only to the filter's use of the column; a formula can contain calls to functions to perform more advanced calculations. See [Using Functions in Analyses](#) (on page 912).

To edit the column formula for a filter

- 1 In the Define Criteria page, in the Filters section, click the Filter Options button for the filter, and then select Edit Column Formula.
- 2 Click the Column Formula tab.
- 3 Type the formula into the Column Formula area.
- 4 Click OK to save your changes.

Removing Column Filters

You can remove a single filter or all filters from an analysis.

NOTE: If the analysis was saved previously with any filters applied, save the analysis again to remove the filters.

To remove a column filter from an analysis

- In the Define Criteria page, in the Filters section, click the X icon.

Combining Column Filters with Other Column Filters

Combining column filters, also known as parenthetical filtering, allows you to create complex filters without requiring you to know SQL.

You can combine column filters with AND and OR operators. The AND operator means that the criteria specified in each filter must be met. This is the default method for combining column filters. The OR operator means that the criteria specified in at least one of the column filters must be met.

To combine a column filter with other column filters

- 1 In the Define Criteria page, add at least two column filters to an analysis, or add at least two column filters to a saved filter.

The filters are listed in the Filters section with an AND operator between them.

- 2 To change an AND operator to an OR operator, click it.
- 3 As you add column filters, click AND and OR operators to group filters and construct the desired filter combinations.

Combined filters elements are bounded by boxes.

- 4 To cut, copy, or ungroup bounded elements, click the Edit Filter Group button and select the appropriate option.

Preventing a Filter from Being Replaced During Navigation and Prompting

You can protect the contents of a filter in a report from being affected during navigation and prompting. A protected filter is always applied to results.

To protect a filter from changing during navigation and prompting

- In the Define Criteria page, in the Filters section, click the Filter Options button for the filter, and then select Protect Filter.

Using Saved Reports as Filters

Filters can be combined with other filters, as well as be based on the values returned by another report. Any saved report that returns a column of values can be used to filter the selected column in your report.

To create a filter based on the results of another saved report

- 1 In the Define Criteria page, click the New Filter button in the column where you want to create the filter.
- 2 In the Create/Edit Filter dialog box, click Advanced, and then select the Filter based on results of another request option.
- 3 In the Filter on Saved Request dialog box, in the Relationship field, select the appropriate relationship between the results and the column to be filtered.
- 4 Click Browse and navigate to the saved report.
- 5 In the Use Values in Column field, select the column that is to be used for the filter.

If the saved report contains a column name that matches the column where you are creating the filter, that column name appears first in the list of values in the Use Values in Column field. You can select a different column.

- 6 Click OK.

The filter appears in the Filters section in the Define Criteria page.

NOTE: If you later want to edit the filter, you can edit only the information shown in the Filter on Saved Request dialog box.

Editing the SQL for a Column Filter

You can edit the logical SQL WHERE clause to be used as a filter. While generally not necessary, this feature is available for users who need advanced filtering capability. For a comprehensive description of SQL syntax, see a third-party reference book on SQL, a reference manual on SQL from one of the database vendors, or an online reference site. For more general information about using SQL in Oracle CRM On Demand Answers, see [Using Functions in Analyses](#) (on page 912).

To edit the SQL generated for a column filter

- 1 While in the Create/Edit Filter dialog box, click Advanced, and then select the Convert this filter to SQL option.
- 2 Enter your modifications into the text box and then click OK.
The filter appears in the Filters area on the Define Criteria page. Once you have chosen this option, editing the filter will always display the SQL that you entered.

Example: Identifying Customers with the Most Sales Volume

The following example reports data on the ten customers with the most sales volume in 2003.

```
"Close Date"."Calendar Year" = 2003
```

```
AND RANK("Opportunity Metrics"."Closed Revenue") <= 10
```

Editing Column Properties

You can edit properties for a column to control the appearance and layout of a column and its contents. You can also specify formatting to apply only if the contents of the column meet certain conditions. By default, your selections for a column apply only to the current report.

Editing the Appearance of Column Contents

The default appearance of column contents in results is based on cascading style sheets and XML message files. You can use the Style tab of the Column Properties dialog box to override several default settings, such as the font and font size to use. Your selections apply only to the contents of the column for the report with which you are working.

To edit the appearance of column contents

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.
- 2 In the Column Properties dialog box, click the Style tab.
- 3 Make your choices for font, cell, border, image, and advanced style formatting options.
For more information, see *Formatting Column Content* in this topic.
- 4 In the Data Format tab, you can control the way the data is displayed by selecting the Override Default Data Format check box.

This option allows you to override the default display characteristics. The selections that you see vary based on the data type. For example, if the column contains numeric data, you can select how you want the numbers treated, such as percentages, month names, or dates. You can select the number of decimal places to display, how to display negative numbers, the number of digits to show, and the thousands separator to use. If your column contains text, you can select how to treat the text, such as plain text, HTML, or a link. Based on your selection, the Custom Text Format text box displays the applicable HTML string used to display the data.

To use a custom format for text, select Custom Text Format from the Treat Text As drop-down list, and then enter the custom format. You can enter HTML calls that provide special formatting. You can also enter any valid HTML string, including JavaScript, VBScript, and so on.

For example, the following example HTML sets the column width and height in tables and pivot tables. In the example, the text html enclosed in brackets ([html]) means to use HTML, and the at sign character (@) represents the dynamic contents of the column.

```
[html]<span style="width:200px" style="height:50px">@</span>
```

If you do not know HTML, JavaScript, VBScript, and so on, you can consult a third-party reference.

To create a custom numeric format, you can use the number sign (#) to include significant digits, and the number zero (0) to include as many digits as specified, even if the number does not contain that detail. These are examples:

Specifying ##.# shows 12.34 as 12.3

Specifying ##.000 shows 12.34 as 12.340

- 5 Click OK when you are done.

Editing the Layout of Column Contents

Use the Column Format tab of the Column Properties dialog box to perform the following tasks:

- Specify whether the column should appear in results.

Columns are usually visible in results by default. However, you may want to include a column in your report that you do not want displayed in results, such as a column used in creating a filter.

- Assign alternate table and column headings and apply custom formatting to them.
- Control the display of duplicate data such as repeating column values.

The data in one column of a table may be repeated in relation to rows of data in other columns in the table. For example, if one column lists customer names and another column lists the regions those customers are in, the region data could be repeated for each customer row. You can select to display duplicate data only once, or display it for every row. Displaying repeating or duplicated data only once can make a table somewhat easier to read, and can make distinctions in that data more apparent.

- Specify the interaction that should occur when users work with the results, such as navigation to another report.

You can also use functions and conditional expressions to format results in a variety of ways.

Your selections apply only to the contents of the column for the report with which you are working.

To hide a column in results

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.
- 2 In the Column Properties dialog box, click the Column Format tab.
- 3 Select the Hide this column check box, if it is not already selected.

To create custom table and column headings

- 1** In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.
- 2** In the Column Properties dialog box, click the Column Format tab.
- 3** In the Headings area, select the Custom Headings check box.
This allows you to change the heading text and the heading formatting.
- 4** To change the text of the table or column heading, enter a new heading into the appropriate text box.
The heading will be used in this report instead of the default heading.
NOTE: You can also specify navigation to another report in the Column Heading Interaction area.
- 5** To change the format of the table or column heading, click the Edit Format button next to the text box.
The Edit Format dialog box appears.
Make your choices for font, cell, border, and advanced style formatting options. For more information, see "Formatting Column Content" below.

To suppress duplicate data

- 1** In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.
- 2** In the Column Properties dialog box, click the Column Format tab.
- 3** In the Value Suppression area, select the appropriate option:
 - Select Suppress to display repeating data only once and suppress duplicate rows.
 - Select Repeat to display repeating data for every row.
 - Select Default to retain the default display characteristics.

To specify what happens when users click the column

- 1** In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.
- 2** In the Column Properties dialog box, click the Column Format tab.
- 3** To specify what should happen when users click the column, select the appropriate option in the Column Heading Interaction area:
 - Default - Restores the default interaction.
 - Drill - Allows you to drill down, so that you can view more information.
 - Navigate - Allows navigation to another analysis. Click the Add Navigation Target button, browse to a target report or dashboard, click OK, and enter a caption for the target in the Caption text box. Repeat

this step for each navigation target you want to add. Click the Remove button beside the Caption text box to remove that navigation target.

- No interaction - Disables drilling or navigation. Interactions are defined separately for a column heading and the data in a column.

To specify what happens when users click a value

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.
- 2 In the Column Properties dialog box, click the Column Format tab.
- 3 To specify what should happen when users click a value, select the appropriate option in the Value Interaction area:
 - Default - Restores the default interaction.
 - Drill - Allows you to drill down, so that you can view more information.
 - Navigate - Allows navigation to another analysis. Click the Add Navigation Target button, browse to a target report or dashboard, click OK, and enter a caption for the target in the Caption text box. Repeat this step for each navigation target you want to add. Click the Remove button beside the Caption text box to remove that navigation target.
 - No interaction - Disables drilling or navigation. Interactions are defined separately for a column heading and the data in a column.

Applying Conditional Formatting to the Column Contents

In tables and pivot tables, conditional formatting helps direct attention to a data element if it meets a certain condition. For example, you can show high revenue sales figures in a certain color, or display an image such as a trophy next to the name of each salesperson who exceeds revenue by a certain percent.

You do this by selecting one or more columns in the report to use, specifying the condition to meet, and then making selections for font, cell, border, and style sheet options to apply when the condition is met. The conditional formats can include colors, fonts, images, and so on, for the data and for the table cell that contains the data. The steps to specify a condition are very similar to those used to create filters.

You can add multiple conditions so that the data and the table cell are displayed in one of several formats, based upon the value of the data. For example, low revenue sales can be displayed in one color, and high revenue sales can be displayed in another color.

Several subtle conditional formatting differences exist between traditional tables and pivot tables. Conditional formats that format one column based on the value of another column are not reflected in a pivot table, but are reflected in a standard table. For example, setting the color of a region name based on the sales in that region has no effect in a pivot table. However, setting the color of the sales data based on the value of the sales data is reflected in a pivot table, as is setting the color of the region name based on the actual name; for example, displaying a value of Eastern Region in bold colored text.

NOTE: In pivot tables, conditions are evaluated against the values as calculated or aggregated by the pivot table. Conditional formatting is applied based on the underlying value, even if you select the Show As options to show the data as percents or indexes.

Your selections apply only to the contents of the column for the report with which you are working.

To add conditional formatting to a column in a report

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.
- 2 In the Column Properties dialog box, click the Conditional Format tab.
- 3 Click the Add Condition button and select the desired column in the report for use in constructing the condition.

The Create/Edit Filter dialog box opens. Select the operator and value for the condition.

NOTE: When you access the Create/Edit Filter dialog box from the Conditional Format tab, the dialog box shows only the options that apply to conditional formats. For example, the Operator drop-down list shows the subset of operators that are used in conditional formats.

- 4 Click OK in the Create/Edit Filter dialog box.

The Edit Format dialog box appears.

- 5 Make your choices for font, cell, border, image, and advanced style formatting options.

For more information, see [Formatting Column Content](#) in this topic.

NOTE: If you specify an image as part of the conditional formatting, it appears conditionally in the results.

- 6 Click OK when you are done to return to the Column Properties dialog box.

The Column Properties dialog box shows the condition, and the conditional formatting to apply.

Columns are evaluated in the order that they are listed.

- To reorder a column, click the Move Up or Move Down buttons.
- To delete a column from the condition, click the Delete button.
- To edit a condition or a conditional format, click it.

- 7 You can specify another condition to include, or click OK if you are done.

The following example describes how conditional formatting can be applied to results.

Suppose a report includes ten ranking categories, with a value of 1 in the column indicating the worst ranking, and a value of 10 indicating the best ranking. You could apply conditional formatting to show the following:

- One image to indicate a low rank for columns that contain 1, 2, or 3.
- Another image to indicate an average rank for columns that contain 4, 5, 6, or 7.
- A third image to indicate a high rank for columns that contain 8, 9, or 10.

In the Graphics dialog box, select the Images Only image placement option. In the results display, the columns appear with only the images, and not the ranking numbers.

Formatting Column Content

Use the Edit Format dialog box (and the options on the Style tab of the Column Properties dialog box) to select font, cell, border, and advanced style formatting options for column data that is shown inside a cell in a tabular format, such as a table or pivot table. You can also select settings for table and column headings.

If you are overriding the default formatting properties for a column, your selections are static. If you are specifying conditional formatting properties for a column, your selections apply only if the condition is met.

To use the Edit Format dialog box or the Style tab of the Column Properties dialog box

- 1** In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for the column.
- 2** In the Column Properties dialog box, click the Style tab.
- 3** In the Font area, make your selections for font family, size, color, style (such as bold), and any effects to apply (such as underlining).
- 4** In the Cell area, make your selections for alignment, background color, and an image to display inside the cell.
 - The selections for horizontal and vertical alignment are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

For horizontal alignment:

Select left to left-justify the data. This is the most common justification for text data. Select Right to right-justify the data. This is the most common justification for numeric data. Select Center to center the data. To retain the default data alignment associated with this column, select Default.

For vertical alignment:

Select Top to align the data to the top of the table cell. Select Bottom to align the data to the bottom of the table cell. Select Center to align the data to the middle of the table cell. To retain the default vertical alignment associated with this column, select Default.

- When you click the Image button, the Graphics dialog opens.
 - Select the No Image option if you do not want to include an image.
 - To include a custom image, select the Custom Image option and specify the appropriate path in the text box. The image should be one that is accessible to all users who will view the results. Custom images can be used for both conditional and unconditional results.
 - To include an image distributed with Oracle CRM On Demand Answers, use the graphics selection window. The window shows images that are useful in conditional formatting, such as meters and trend arrows. The left pane shows the categories of images. When you click on an image category, the right pane shows the images in that category. Make your selection by selecting the radio button next to the image you want to use.
 - To specify the location of the image within the cell, make a selection from the Image Placement drop-down list:

Default - Displays any images in the default position, which is usually to the left of the column data or heading.

Images Left - Displays any images to the left of the column data or heading.

Images Right - Displays any images to the right of the column data or heading.

Images Only - Displays only the image, and not the column data or heading.

- 5 In the Border area, make your selections for the border position, color, and style of the cell.
- 6 In the Additional Formatting Options area, make your selections for column width, height, indent (left padding), right padding, top padding, and bottom padding.
- 7 In the Custom CSS Style Options (HTML Only) area, you can override style and class elements specified in Oracle CRM On Demand Answers style sheets. This capability is for users who know how to work with cascading style sheets.
 - Expand the Custom CSS Style Options (HTML Only) area by clicking the + icon.
 - Click the check box beside the settings you want to use, and then provide the location of the class, style, or style sheet.

For example, for Use Custom CSS Style you can enter valid CSS style attributes, separated by semicolons, such as:

```
text-align:center;color:red
```
- 8 Click OK when you are done to close the dialog box.

Using Custom Date/Time Format Strings

Custom date/time format strings provide additional options for formatting columns that contain timestamps, dates, and times.

To enter a custom date/time format string

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Column Properties button for a column that contains a timestamp, a date, or a time.
- 2 In the Column Properties dialog box, select the following option in the Data Format area: Override Default Data Format check box.
- 3 In the Date Format field, select Custom from the drop-down list.
- 4 In the Custom Date Format field, type the custom format string exactly as shown in the following tables, including left and right bracket characters ([]).

NOTE: You must type the custom format string into the Custom Date Format field. Custom format strings are not available for selection from the drop-down list.

General Custom Format Strings

The following table describes some general custom format strings and the results they display. These allow the display of date/time fields in the user's locale.

General Format String	Result
[FMT:dateShort]	Formats the date in the locale's short date format. You can also type [FMT:date].
[FMT:dateLong]	Formats the date in the locale's long date format.
[FMT:dateInput]	Formats the date in a format acceptable for input back into the system.
[FMT:time]	Formats the time in the locale's time format.
[FMT:timeHourMin]	Formats the time in the locale's time format but omits the seconds.
[FMT:timeInput]	Formats the time in a format acceptable for input back into the system.
[FMT:timeInputHourMin]	Formats the time in a format acceptable for input back into the system, but omits the seconds.
[FMT:timeStampShort]	Equivalent to typing [FMT:dateShort] [FMT:time]. This formats the date in the locale's short date format and the time in the locale's time format. You can also type [FMT:timeStamp].
[FMT:timeStampLong]	Equivalent to typing [FMT:dateLong] [FMT:time]. This formats the date in the locale's long date format and the time in the locale's time format.
[FMT:timeStampInput]	Equivalent to [FMT:dateInput] [FMT:timeInput]. This formats the date and the time in a format acceptable for input back into the system.
[FMT:timeHour]	Formats the hour field only in the locale's format, such as 8 PM.

ODBC Custom Format Strings

The following table shows the ODBC standard typed custom format strings and the results they display. These display date/time fields according to the ODBC standard.

ODBC Format String	Result
[FMT:dateODBC]	Formats the date in standard ODBC yyyy-mm-dd format (4-digit year, 2-digit month, 2-digit day).
[FMT:timeODBC]	Formats the time in standard ODBC hh:mm:ss format (2-digit hour, 2-digit minute, 2-digit second).
[FMT:timeStampODBC]	Equivalent to typing [FMT:dateODBC] [FMT:timeStampODBC]. This formats the date in yyyy-mm-dd format, and the time in hh:mm:ss format.
[FMT:dateTyped]	Displays the word date and then shows the date, in standard ODBC yyyy-mm-dd format. The date is shown within single quote characters (').
[FMT:timeTyped]	Displays the word time and then shows the time, in standard ODBC hh:mm:ss format. The time is shown within single quote characters (').

ODBC Format String	Result
[FMT:timeStampTyped]	Displays the word timestamp and then the timestamp, in standard ODBC yyyy-mm-dd hh:mm:ss format. The timestamp is shown within single quote characters (').

Custom Format Strings for Integral Fields

The following table shows the custom format strings that are available when working with integral fields. These allow the display of month and day names in the user's locale.

Integral fields hold integers that represent the month of the year or the day of the week. For months, 1 represents January, 2 represents February, and so on, with 12 representing December. For days of the week, 1 represents Sunday, 2 represents Monday, and so on, with 7 representing Saturday.

Integral Field Format String	Result
[MMM]	Displays the abbreviated month name in the user's locale.
[MMMM]	Displays the full month name in the user's locale.
[DDD]	Displays the abbreviated day of the week in the user's locale.
[DDDD]	Displays the full day of the week in the user's locale.

Custom Format Strings for Conversion into Hours

The following table shows the custom format strings that can be used to format data into hours. These can be used on the following kinds of fields:

- Fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).
- Fields where the output is in [FMT:timeHour] format. (This format displays the hour field only in the locale's format, such as 8 PM.)

Data Conversion Format String	Result
[FMT:timeHour]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and formats the number of hours into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 2 AM, and a value of 12.24 as 12 PM.
[FMT:timeHour(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and formats the number of minutes into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 12 AM, and a value of 363.10 as 06 AM.
[FMT:timeHour(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and formats the number of seconds into an hh display, where hh is the number of hours. Fractional hours are

Data Conversion Format String	Result
	dropped from the value. For example, a value of 600 is formatted as 12 AM, a value of 3600 as 1 AM, and a value of 61214.30 as 5 PM.

Custom Format Strings for Conversion into Hours and Minutes

The following table shows the custom format strings that can be used to format data into hours and minutes. These can be used on fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).

They can also be used where the output is in [FMT:timeHourMin] format. (This format displays the time in the locale's time format, but omits the seconds.)

Data Conversion Format String	Result
[FMT:timeHourMin]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 12 is formatted as 12:12 AM, a value of 73 as 1:13 AM, and a value of 750 as 12:30 PM.
[FMT:timeHourMin(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 60 is formatted as 12:01 AM, a value of 120 as 12:02 AM, and a value of 43200 as 12:00 PM.
[FMT:timeHourMin(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the number of hours into an hh:mm display, where hh is the number of hours and mm is the remaining number of minutes. For example, a value of 0 is formatted as 12:00 AM, a value of 1.5 as 1:30 AM, and a value of 13.75 as 1:45 PM.

Custom Format Strings for Conversion into Hours, Minutes, and Seconds

The following table shows the custom format strings that can be used to format data into hours, minutes, and seconds. These can be used on fields that contain integers or real numbers that represent time.

They can also be used where the output is in [FMT:time] format, described in the topic General Custom Format Strings. (This format displays the time in the locale's time format.)

Data Conversion Format String	Result
[FMT:time]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 12:01:00 AM, a value of 126 as 12:02:06 AM, and a value of 43200 as 12:00:00 PM.

Data Conversion Format String	Result
[FMT:time(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 1:00:00 AM, a value of 126 as 2:06:00 AM, and a value of 1400 as 11:20:00 PM.
[FMT:time(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 6.5 is formatted as 6:30:00 AM, and a value of 12 as 12:00:00 PM.

Advanced Custom Formats

In addition to the formats previously described, you can format dates and times by creating your own format using some of the common date and time formats described in the following table.

For example, using the following formats, you can create the format:

dddd - h:mm tt

which formats the timestamp fields in the following way:

Monday - 4:03 PM

NOTE: When using these formats, do not include the square brackets ([]) that are required with other formats.

While the following formats do provide greater formatting flexibility, they do not allow date formats to change according to the user's locale setting, which is possible with many of the previous formats.

Some common date and time formats are described in the following table.

Format	Result
d	Number of the day of the month (for example: 1 through 31). Single-digit numbers do not have a leading zero (0).
dd	Like d, but single-digit numbers begin with a 0.
ddd	Three-letter abbreviation for the day of the week (for example: Sun, Mon).
dddd	Full name of the day of the week (for example: Sunday, Monday).
M	Month number (for example, 1, 12). Single-digit numbers do not have a leading 0.
MM	Similar to M, but single-digit numbers begin with a 0.
MMM	Three-letter abbreviation for the month (for example: Jan, Feb).
MMMM	Full name for the month (for example: January, February).
yy	Two-digit number for the year (for example: 06).

Format	Result
yyyy	Four-digit number for the year (for example: 2006)
h	Hour in a 12-hour format. Single-digit numbers do not have a leading 0.
hh	Similar to h, but single-digit numbers begin with a 0.
H	Hour in 24-hour format. Single-digits do not have a leading 0.
HH	Similar to H, but single-digit numbers begin with a 0.
m	Number of minutes. Single-digit numbers do not have a leading 0.
mm	Similar to m, but single-digit numbers begin with a 0.
s	Number of seconds. Single-digit numbers do not have a leading 0.
ss	Similar to s, but single-digit numbers begin with a 0.
tt	AM and PM indicator. Use with h and hh formats.

Setting Up Column Formulas

Advanced users can create new formulas, or edit existing formulas, using built-in functions. Oracle CRM On Demand Answers supports a wide variety of SQL-92 functions, as well as extensions to SQL-92. For information about the available functions, see [Using Functions in Analyses](#) (on page 912).

To edit or add a formula

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Edit Formula button for a column whose formula you want to edit or add.
- 2 In the Edit Column Formula dialog box, select the Column Formula tab.
- 3 Select the Custom Headings check box if you want to change the table heading and column heading text.
- 4 Modify the formula, as required, using the buttons below the Column Formula box.
- 5 Select an aggregation rule from the Aggregation Rule drop-down list, as required.
- 6 Select the Bins tab and combine multiple values or ranges into bins, if required.
For more information, see the [To combine multiple values or ranges into bins](#) procedure in this topic.
- 7 Click OK.

In an analysis, you can also use functions and conditional expressions to present search results in a variety of ways.

To combine multiple values or ranges into bins

- 1 In the Edit Column Formula dialog box, select the Bins tab.
 - 2 Click Add Bin, enter or select the values or ranges of the value that you want to combine into the bin, then click OK.
 - 3 In the Edit Bin Name dialog box, enter the name for the bin.
 - 4 Repeat steps 2 and 3 until you have added all the bins that you want.
- All instances of the different values that make up the bin in the result set will be replaced by the bin name. Aggregations are performed accordingly as well.

Adding Action Links to Results

You can add action links to results. Action links allow users to access record detail pages by clicking links on records in reports. You add action links using the following methods:

- **Using Action Link classes.** Using this method, you can configure the record type name in the report as an action link. The Action Link class takes the Row ID value in the report, and uses it to retrieve the specific record from Oracle CRM On Demand. You can use this method for the following record types: Account, Service Request, Opportunity, Contact, Lead, and User.
- **Using URLs.** Using this method, you can create links to any record type from a table or pivot table view. You can configure the record type ID column as an action link.

About Record Type Names in Action Links

When you add an action link, you must use the original record type name in the code or URL that adds the link. If your company administrator has changed the names of record types in Oracle CRM On Demand, you must determine the original name of the record type where you want to add the link. For example, your company administrator might have renamed the Account record type so that is now called the *Customer* record type. If you want to add an action link to a result for the Customer record type, the link code or URL must refer to the Account record type (that is, the original name of the record type). Depending on the type of link that you want to create, use the record type name in your code or URL as follows:

- When adding an action link for the Customer record type (originally the Account record type) using Action Link classes, use the *account* record type name in the link code, as shown in the following example:

```
[html]"<a onClick=\"javascript:LinkOccam (this, 'account');\">\"@\"</a>\"
```

When you add action links using Action Link classes, the record type name must be all lowercase letters in the link code.

TIP: To determine the original name of the record type for which you want to add a link, open the Homepage for the record type. The URL in the Address field in your browser window shows the original name of the record type. In the example where the Account record type was renamed to *Customer*, the Customer Homepage shows the following URL:

```
https://server_name/OnDemand/user/AccountHomePage
```

where:

server_name is the URL used for signing in to Oracle CRM On Demand

- When adding an action link for the Customer record type (originally the Account record type) using a URL, use the *Account* record type name in the URL, as shown in the following example:

```
"http://"@[html]"<a target=_top  
href=https://server_name/OnDemand/user/AccountDetail?OMTGT=AccountDetailForm&OMTHD=AccountDetailNav&AccountDetailForm.Id="@>"@</a>"
```

TIP: To determine the correct URL for the Detail page for a record type, open the Detail page for any record of that record type. In the Address field in your browser window title bar, copy the relevant part of the address string, from *http* to *Id=*. In the example where the Account record type was renamed to Customer, the URL is copied from the Detail page of a Customer record.

In some cases, the full record type name is used in all places in the URL for a record type detail page, as is the case with the URL shown in the preceding example. However, in other cases, an abbreviated version of the record type name is used in certain locations in the URL.

For example, if the record type for which you are adding the link was originally the Opportunity record type, the URL is as follows:

```
"http://"@[html]"<a target=_top  
href=https://server_name/OnDemand/user/OpportunityDetail?OMTGT=OpptyDetailForm&OMTHD=OpportunityDetailNav&OpptyDetailForm.Id="@>"@</a>"
```

The following procedure describes how to add action links using Action Link classes.

To add action links using Action Link classes

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, add the columns to the report.
You must add the record type name field (for example, Account Name) and the record type ID field (for example, Account ID) to the report, and you must place the ID field immediately to the right of the name field in the report layout.
- 2 Click the Column Properties button for the record type ID column.
- 3 In the Column Properties dialog box, click the Column Format tab.
- 4 In the Column Format tab, select the Hide this column check box, and click OK.
- 5 In the Define Criteria page, click the Column Properties button for the record type Name column.
- 6 In the Column Properties dialog box, click the Style tab.
- 7 In the Style tab, do the following:
 - a Expand the Custom CSS Style Options (HTML Only) area by clicking the plus (+) icon.
 - b Select the Use Custom CSS Class check box, and type *ActionLink* in the text box.
- 8 Click the Data Format tab.
- 9 In the Data Format tab, do the following:

- a** Select the Override Default Data Format check box.
- b** In the Treat Text As list, select Custom Text Format.
- c** In the Custom Text Format field, type text similar to the following example after the at sign (@).

In this example, an action link is created for an account:

```
[html]"<a onClick=\"javascript:LinkOccam (this, 'account');\">\"@\"</a>\"
```

To create an action link for one of the other record types that supports action links created with Action Link Classes, replace the word *account* in the preceding example with *opportunity*, *lead*, *contact*, *user*, or *service*, as appropriate. The record type name must be all lowercase letters.

NOTE: You must use the original record type name in the link code. If your company administrator has renamed the record types in Oracle CRM On Demand, you must determine the original name of the record type where you are adding the action links, and use that name in the link code.

10 Click OK.

11 To preview the report, click Preview Analysis.

The following procedure describes how to add action links using URLs. You can use this procedure to add action links for any record type.

To add action links using URLs

- 1** In Oracle CRM On Demand Answers, in the Define Criteria page, add the columns to the report, including the record type ID (for example, Account ID) column.

NOTE: For the action link to work, you must add the record type ID field to the report.

- 2** Click the Column Properties button for the record type ID column.
- 3** In the Column Properties dialog box, click the Data Format tab.
- 4** In the Data Format tab, do the following:

- a** Select the Override Default Data Format check box.
- b** In the Treat Text As list, select Custom Text Format.
- c** In the Custom Text Format field, enter the code for the link after the at sign (@), as shown in the following example:

```
"http://\"@[html]"<a target=_top
href=https://server_name/OnDemand/user/OpportunityDetail?OMTHD=OpportunityDetailNav&OM
TGT=OpptyDetailForm&OpptyDetailForm.Id=\"@\">\"@\"</a>\"
```

where:

server_name appears in the example, substitute the URL that you use to sign in to Oracle CRM On Demand.

In the preceding example, the URL is for the Opportunity record type. Use the appropriate URL for your Oracle CRM On Demand server and the record type for which you are creating the link.

NOTE: You must use the original record type name in the URL. If your company administrator has renamed the record types in Oracle CRM On Demand, you must determine the original name of the record type where you are adding the action links, and use that name in the URL.

Oracle CRM On Demand Answers replaces the final at sign (@) in the string with the value of the record type ID for each record in the report. If you do not want the link to display the record type ID, replace the final at sign (@) with the text that you want to be displayed. In the following example, the ID in the action link will be replaced with the word *View*:

```
"http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/OpportunityDetail?OMTHD=OpportunityDetailNav&OM
TGT=OpptyDetailForm&OpptyDetailForm.Id="@">View</a>"
```

5 Click OK.

6 To preview the report, click Preview Analysis.

The following example shows the code to use for a link on an asset record:

```
"http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/AssetDetail?OMTHD=AssetDetailNav&OMTGT=AssetDetail
Form&AssetDetailForm.Id="@">"@"/a>"
```

The following example shows the code to use for a link on an appointment record:

```
"http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/ApptDetail?OMTHD=ApptRead&OMTGT=ApptDetailForm&App
tDetailForm.Id="@">"@"/a>"
```

The following example shows the code to use for a link on a task record:

```
"http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/TaskDetail?OMTHD=ReadTaskDetail&OMTGT=TaskDetailFo
rm&TaskDetailForm.Id="@">"@"/a>"
```

Sorting and Reordering Columns

You can select the sort order for the data in a column as well as make sure the columns appear in the order you want.

You can specify the sort order for one or more columns that appear in an analysis. When you click the Order By button, it shows a new image to indicate the sort order that the selected column will apply to the results.





To sort an analysis based on columns

1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the Order By button for the column you want to sort by.

The button changes to indicate the sort order.

2 Continue clicking the Order By button until the sort order you want appears.

The following table describes the available sort orders.

Button	Description
	The selected column will not be used to sort the results.
	The results will be sorted in ascending order, using the items in the selected column.
	The results will be sorted in descending order, using the items in the selected column.
	<p>A number that appears on an Order By button indicates that the column is not the primary sort column applied to the results. The number corresponds to when the sort order is applied.</p> <p>In this example, the column is used as the second sort order column. The up arrow indicates that the results are sorted in ascending order, using the items in the selected column.</p>

About Using Addresses in Reports

Many reports require the use of address fields. In Oracle CRM On Demand, you can generate reports about addresses in two different ways, depending on your needs. In the Active Subject Area in Oracle CRM On Demand Answers, an address folder with the word Extended in it (for example, Billing Address - Extended) provides reporting on all nine standard address fields included with Oracle CRM On Demand. For details on how each field maps to the address format for specific countries, see [About Countries and Address Mapping](#) (on page 1286).

Fields included from the address Extended folder are not drillable in reports. Field labels display consistently regardless of the country for each record or the user's default, company country in Oracle CRM On Demand.

Most of the other address fields in the Active Subject Area in Oracle CRM On Demand Answers (those not in the Extended folder) are drillable when included in reports. The fields displayed match those fields associated with the user's default, company country in Oracle CRM On Demand. However, all fields might not appear if the country associated with a specific record is not the same as the user's default, company country in Oracle CRM On Demand.

Combining Results from Multiple Reports Using Set Operations

After you select a subject area and add columns to a report, you can combine criteria from one or more subject areas using Set operations. This action combines the results of two or more reports into a single report.

NOTE: The number and data types of the columns selected in each component must be the same. The column lengths can differ.

The following table lists the Set operators and describes their effects on results.

Set Operator	Effect on Results
Union	Returns nonduplicate rows from all reports.
Union All	Returns all rows from all reports, including duplicate rows.
Intersect	Returns rows that are common to all reports.
Minus	Returns rows from the first report that are not in the other reports.

To combine the results of multiple reports

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, click the plus sign in the Advanced section, and then click Combine with Similar Analysis.
- 2 In the Subject Area dialog box, select a subject area that contains the data that you want to combine with the columns in your report.

The subject area can be the same as the subject area from which the existing columns in the report are taken or a different subject area.

The Set Operations page appears.
- 3 Follow the onscreen instructions to build the combined report.
- 4 Click the Set button and select the operation type.
- 5 Select columns from the selection area to combine with the first report.
- 6 If required, define the filters that are specific to the current subject area.
- 7 Add additional subject areas by clicking Edit in the Set Operations section, and then choose Create New Criteria.
- 8 Edit column characteristics (format column, sort) for the combined report by clicking Result Columns in the Set Operations section.

This action displays the resulting columns with buttons that you can use to edit format and sorting.

Step 2: Creating Layouts

After you define the criteria, you should create the layout for your report. In this step, you can add more views to your layout. These initially show up at the bottom of your layout. You can also add subtotals and totals to your columns.

Views use the presentation capabilities to help you look at results in meaningful, intuitive ways. You can add a variety of views to results, such as charts and pivot tables that allow drilling down to more detailed information, explanatory text, a list of filters that were used to limit the results, and more.

When you run a new report, Oracle CRM On Demand Answers initially displays results in a table, with a title preceding the table. It does this by including a Title view, which displays the name of the saved report, and a Table view, which displays the results in a basic table that inherits the formats, sorting and other options specified in the Define Criteria step. You can customize or delete these existing views for a report, add other views, and combine and position views anywhere in the workspace.

Preparing multiple views of results can help you identify trends and relationships in data. You can then save the report with the collection of views.

You define the layout of your reports in the Create Layout page in Oracle CRM On Demand Answers. To access the Create Layout page, either create a new analysis, as described in [Getting Started with Answers \(Custom Reports\)](#) (on page 698), or open an existing analysis in Oracle CRM On Demand Answers.

Your layout can include any views shown in the following table.

Layout	Description
Title	Use this view to include a title and subtitle, a saved name for the results, and a custom logo to identify the results. For result-specific help, you can include a help icon that links to any HTML page or site that contains information about the report or the results.
Table	Use this view to display data in a column format. You can select to display a page of information at a time, which is convenient for larger result sets, and control the size of the page and the position of the paging controls. Tables are supported in a wide variety of formats and can include graphics, links, and so on, using custom formatters. Using Table view, users can also change the format of the table headings.
Chart	Use this view to drag and drop columns to a layout chart. You have complete control over the title, the location of the legend, axis titles and data labels. You can control the size and scale of the chart, and control colors using a style sheet. In addition, you can drill down into the results. Supported chart types include bar charts, column charts, line charts, area charts, pie charts, scatter charts, bubble charts, and custom subtypes including 2D, 3D, absolute, clustered, stacked, combination, and custom.
Pivot table	Use this view if you want to be able to take row, column and section headings and swap them around to obtain different perspectives. You can drag and drop headings to pivot results, preview them, and apply the settings. Users can navigate through pivot tables and drill down into information. Users can create complex pivot tables that show aggregate and nonrelated totals next to the pivoted data, allowing for flexible analysis. For an interactive result set, elements can be placed in pages, allowing users to select elements. Like the Table view, elements can be formatted using custom formatters.
Gauge	Use the gauge view to show results as gauges, such as dial, bar, and bulb-style gauges.
Active filters	Use this view to show the filters in effect for a report.
Static text	Use this view to include static text in the results. You can use HTML to include banners, tickers, Active-X objects, Java applets, links, instructions, descriptions, graphics, and so on, in the results.

Layout	Description
Legend	Use the Legend view to document the meaning of special formatting used in results, such as the meaning of custom colors applied to gauges.
Column selector	Use column selectors to allow users to dynamically change which columns are displayed in the analysis. This allows users to analyze data along several dimensions and dynamically alter the content of the results.
View Selector	Use the View Selector view to select a specific view of the results from among the saved views. When placed on a dashboard, the view selector appears as a drop-down list where users can make a selection.
Funnel chart	Use this view to display a three-dimensional chart that represents target and actual values using volume, level and color. It is useful for depicting target values that decline over time, such as a sales pipeline.
Narrative	Use this view to display the results as one or more paragraphs of text. You can enter in a sentence with placeholders for each column in the results, and specify how rows should be separated. You can incorporate custom HTML or JavaScript to specify how information is displayed.
Ticker	Use this view to display the results of a report as a ticker or marquee, similar in style to the stock tickers that run across many financial sites on the Web. This view is useful for calling attention to results and for late-breaking information. You can control what information is presented and how it scrolls across the page. This view supports a variety of formats and can include graphics, links, and so on, using custom formatters.
No Results	Use this view to specify explanatory text to appear if the report does not return any results.

Click a topic to see step-by-step instructions to do the following:

- [Adding Titles to Results](#) (on page 863)
- [Adding Tables to Results](#) (on page 864)
- [Showing Results in Charts](#) (on page 865)
- [Showing Results in Pivot Tables](#) (on page 878)
- [Showing Results as Gauges Using Gauge View](#) (on page 888)
- [Showing Filters Applied to Results](#) (on page 893)
- [Adding Markup Text to Results](#) (on page 893)
- [Adding Legends to Reports Using Legend View](#) (on page 896)
- [Allowing Users to Change Columns in Reports](#) (on page 896)
- [Allowing Users to Select a Specific View Using View Selector View](#) (on page 897)
- [Showing Results in Funnel Charts](#) (on page 898)
- [Adding Narrative Text to Results](#) (on page 900)
- [Showing Results in Scrolling Tickers](#) (on page 902)
- [Alerting Users to No Data](#) (on page 905)

Adding Titles to Results

Use the Title view to add a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results. Titles and subtitles can be formatted.

A Title view is always added to the results, as the first view.

To work with a Title view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new title view, click the Add View button, and then select Title from the drop-down list.
- To edit an existing title view, find the title view, and click the Edit View button.

- 2 In the Title text box, enter the text to display as the title.

If you do not specify a title, the name of the saved report is used as the title. For unsaved reports, the Title text box is blank.

- 3 If you do not want the saved name of the report to appear, clear the Display Saved Name check box.

If the box is checked, the saved name is displayed below the text in the Title text box (if this text exists).

- 4 (Optional) If you want to display a logo image or other graphic, specify the appropriate path in the Logo text box.

The image is displayed to the left of the title text. The image or graphic should be accessible to all users who view this report.

- 5 (Optional) In the Subtitle text box, enter the text to display as a subtitle.

The subtitle text will follow the actual title, on a new line.

- 6 If you want to add additional formatting to the title or subtitle, do the following:

- a Click the edit buttons to the right of the Title and Subtitle dialog boxes.
- b Make your choices for font, cell, and border options, and then click OK.

NOTE: If you enter a new caption, it replaces the original title or subtitle.

- 7 If you want to display the report execution date or time, select one of the timestamp options from the Started Time drop-down list.

- 8 If you want to provide a link to customized help or other information related to the report, enter the appropriate URL in the Help URL text box.

The URL should be one that is accessible to all users who will view this report.

- 9 When you are done, you can save the report with the Title view.

Adding Tables to Results

Use the Table view to show results in a standard table. Users can navigate and drill down in the results. You can add a grand total and column totals, specify custom table and column headings, and change the formula or aggregation rule for a column. You can also edit properties for a column to control the appearance and layout of a column and its contents, and specify formatting to apply only if the contents of the column meet certain conditions.

You can also specify paging controls and the number of rows per page, display column and table headings, apply green bar styling, and enable column sorting. If column sorting is selected, the column headers of the columns that can be sorted have a slightly raised visual appearance.

A Table view is always added to the results, as the second view.

The grand total for columns with the aggregation rule Average will differ in the Table and Pivot Table views. In the Table view, the grand total for a column with an Average aggregation rule is calculated from the database (as a sum divided by a count). In the Pivot Table view, the grand total is the average of the rows in the result set.

NOTE: Changes made to the columns in the Table view (for example column format, column order, sort, formulas and so on) can be seen in the Define Criteria page, and changes in the Define Criteria page can be seen in the Table view.

To work with a Table view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new table view, click the Add View button, and select Table from the views drop-down list.
 - To edit an existing table view, find the table, and then click the Edit View button for the table view.

The workspace shows the options and settings for the view.

- 2 To view the buttons for working with each column individually, select Header Toolbars with Results in the drop-down list to the right of Display.
- 3 To specify the sort order for one or more columns that appear in a report, click the Order By button for a column.

You can order results by more than one column. If you select more than one column, the order is shown on the Order By button. For more information about sorting, see [Sorting and Reordering Columns](#) (on page 858).

- 4 To specify totals, perform the following actions:
 - To add a grand total, click the Grand Total button at the top, and make sure the option Report-Based Total is selected. (Click the Grand Total button again to see the menu with this option.)
 - To add totals for an individual column, click the Total By button for that column, and make sure the option Report-Based Total is selected (click the Total By button again for the individual column, to see the menu with this option).

NOTE: The Total By button is only available for columns that can be *totaled by*. Typically this is a column that has repeated values that would be summed for a total. Also, if the option Report-Based Total is not selected, the system calculates the total based on the entire result set, before applying any filters to the measures.

- 5 To add custom headings or edit the formula for a column, click the Edit Formula button.

The Edit Column Formula dialog box appears, where you can perform the following actions:

- To specify custom headings, select the Custom Headings check box and enter new heading text into the appropriate location.
- To edit the formula for the column, enter it into the Column Formula text box.
- To change the aggregation rule for the column, make a selection from the Aggregation Rule drop-down list.
- To combine multiple values or ranges of values from a given column into bins, click the Bins tab. Then add and name the bins.

All instances of the different values that make up the bin in the result set will be replaced by the bin name. Aggregations are performed accordingly as well.

- 6 To edit the properties for a column, or to specify formatting to apply if the contents of the column meet certain conditions, click the Column Properties button.

The Edit Column Format dialog box appears, where you can make your selections:

- For information about formatting columns and adding conditional formatting, see [Editing Column Properties](#) (on page 843).

- 7 When you are done, you can save the report with the Table view.

To specify paging controls and the number of rows per page, display column and table headings, apply green bar styling, and enable column sorting

- 1 At the table view, click the Edit Table View Properties button near the top of the workspace.
- 2 Make your selections for the various options.

Showing Results in Charts

Use the Chart view to position columns on a chart and to customize the title, legend location, axis titles, data labels, size, and scale. You can select the chart graph, such as a line chart or a bar chart; the chart subtype, such as two-dimensional; and the style for columns, such as the shape and fill pattern. You can also set borders and colors and control other chart characteristics. Users can drill down on the results in the Chart view.

Chart graph choices include area charts, bar charts, bubble charts, line charts, and other types. Chart subtypes include 2D, 3D, absolute, clustered, stacked, combination, and custom.

This topic explains how to work with charts. It contains the following information:

- Chart Graphs for Oracle CRM On Demand Answers
- Chart View Buttons in Oracle CRM On Demand Answers
- Basic Chart Components

This topic also provides instructions for performing the following tasks:

- Adding or modifying chart views
- Specifying general properties for a chart view
- Controlling the display of grid lines in chart views
- Specifying the location of the legend on a chart view
- Setting colors for background, text, and borders in chart views
- Selecting the columns to display as axes in chart views
- Setting axis scaling options in chart views
- Editing scale markers in chart views
- Creating line scale markers
- Creating range scale markers
- Specifying advanced settings for range and line values
- Specifying axis titles and labels in chart views
- Specifying axis titles in chart views
- Specifying what happens when a user clicks a chart
- Formatting the appearance of a chart series
- Making selections for data labels in pie charts

NOTE: Oracle CRM On Demand Answers uses a third-party charting engine. The type of the chart, its size, and the number of elements charted can affect whether axes or legends are displayed. Whether axes or legends are displayed is constrained by the amount of available space on the Web browser page. Sometimes, by adjusting the width and height controls, you can make axes and legends appear in the chart.

Chart Graphs for Oracle CRM On Demand Answers

The following table shows the chart graphs available from the Graph drop-down list and describes their uses. Not all chart graphs are appropriate for all types of data. The default chart graph is a vertical bar chart.

Chart Graph Type	Description
Area	<p>An area graph is similar to a line graph, but with the areas under the lines filled in. Area graphs show the percentage of the whole that each variable comprises.</p> <p>Area graphs are useful for observing changes in cumulative value or percentage over time. For example, you can compare groups on certain measurements, such as outcome, and display group trends.</p>
Horizontal Bar	<p>Use a horizontal bar graph to compare facts by showing bars in a horizontal direction.</p> <p>Horizontal bar graphs are useful for comparing differences among similar items. For example, you can compare competing product sales, same product sales during different periods or the same product sales in different markets.</p>

Chart Graph Type	Description
Bubble	<p>A bubble graph is a variation of a scatter graph that displays data elements as circles (bubbles). It shows three variables in two dimensions. One value is represented by the location of the circle on the x-axis. Another value is represented by the location of the circle on the y-axis. The third value is represented by the relative size of its circle.</p> <p>Bubble graphs are useful for plotting data with three variables and for displaying financial data during a period.</p> <p>TIP: To create a bubble graph, plot one fact on the x-axis, another fact on the y-axis, and a third fact on the bubble radius axis. These three facts are plotted for selections on the Level axis.</p>
Vertical Bar	<p>A vertical bar graph compares facts using vertical columns.</p> <p>Vertical bar graphs are useful for comparing differences among similar items.</p>
Line	<p>A line graph can be used to plot multiple facts.</p> <p>Line graphs are useful for showing patterns and trends in data.</p>
Line Bar Combo	<p>A line bar combination graph plots two sets of data with different ranges: one set as bars, and one set as lines overlaid on the bars.</p> <p>Line bar combination charts are useful for showing trend relationships between data sets.</p> <p>TIP: You can specify any mix of bars and columns, but there must be one of each. You can specify all columns as lines, but if you want only bars, use a bar chart. (When only bars are selected for this chart type, some column selections might be drawn as lines.)</p>
Pareto	<p>A Pareto graph is a form of bar chart and line chart that displays criteria in descending order. In this graph type, the line shows a cumulative total of the percentages.</p> <p>Pareto graphs are useful for identifying significant elements, such as best and worst or most and least.</p>
Pie	<p>A pie graph shows data sets as percentages of a whole.</p> <p>Pie graphs are useful for comparing parts of a whole, such as sales by region or by district.</p>
Radar	<p>A radar graph plots the same information as a bar graph, but instead displays data radiating from the center of the graph. Each data element has its own value axis.</p> <p>Radar graphs are useful for examining the overlap and distribution of data.</p>

Chart Graph Type	Description
Scatter	<p>A scatter graph displays x-y values as discrete points, scattered within an x-y grid. It plots data points based on two independent variables. A scatter graph allows you to plot large numbers of data points and observe the clustering of data points.</p> <p>Scatter graphs are useful for observing relationships and trends in large data sets.</p> <p>TIP: To create a scatter graph, plot one fact on the x-axis, and plot another fact on the y-axis. These facts are plotted for selections on the Level axis.</p>
Step	A step graph is similar to a line graph. It can also be used to plot multiple facts.

Your selection for the chart graph determines the chart subtypes that are available from the Type drop-down list. Not all chart types have subtypes; for example, bubble and radar graphs have no subtypes. Chart subtypes default to the 3D option, if available. Depending on the chart type selection, subtype options might include the following:

- Area charts: 3D and 2D
- Bar charts: 3D, 2D, 3D Stacked, and 2D Stacked
- Line charts: 3D and 2D
- Pareto charts: 3D and 2D
- Pie charts: 3D and 2D
- Scatter charts: Scatter, and Scatter with Lines
- Step charts: 3D and 2D







Your selection for the chart type also determines the styles that are available from the Style drop-down list. Not all chart types have styles. The style defaults to solid fill, if available. Depending on the chart type selection, styles for charts might include the following:

- Area charts: Solid Fill and Pattern Fill
- Bar charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill
- Line charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill
- Pareto charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill
- Pie charts: Solid Fill and Pattern Fill

Chart View Buttons in Oracle CRM On Demand Answers

The buttons at the top of the Chart View page provide access to various chart settings. The following table describes the Chart view buttons and settings.

Chart View Button	Description
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Chart View Button	Description
	General Chart Properties. Sets general properties for the chart, such as its title, whether data labels appear, and the chart size.
	Axis Titles and Labels. Controls the display of the axis title and data labels at the bottom of the chart and to the left of the chart.
	Axis Scaling. Sets the axis scaling properties, the number of tick marks, and the scale type.
	Additional Charting Options. Controls the additional charting options, such as the following: <ul style="list-style-type: none"> The display of grid lines on the chart The location of the legend, and it provides options for resizing the legend Background, text, and border colors How users interact with the chart when they click it, such as drilling down to lower-level data, or navigating automatically to a related saved report or a Web site
	Format Chart Data. Allows you to format the appearance of a chart series, such as color, line width, and line symbols.
	Advanced Properties. For pie charts, allows you to make selections for data labels.

Basic Chart Components

You can define the basic components for a chart. The following table describes the components you can customize.

NOTE: Some components are available only for specific chart types. For example, a pie chart does not have axes. The type of chart you select determines which components are available.

Chart Component	Description
Measure labels	Controls the position and formatting of the column heading for the data in the Measures section. It also provides totaling and ordering capabilities. If there is only one measure, you can exclude this element.
Legend	Use the legend to explain the chart. You can specify a location for the legend, and if it can be shortened.
Axes	The horizontal and vertical lines that identify the scale of the chart. You can specify horizontal and vertical axes for the chart.

Chart Component	Description
Grid Lines	A matrix of horizontal and vertical lines that helps you to relate any point on a chart to the axes. You can specify the colors for grid lines.
Scale Markers	Identifies the scale of the chart. You can specify properties, such as location, size, color, line width and range.
Drill	Displays more detail. You can specify if and how a user can drill down to access further details about the information presented in the chart.
Title	Specifies a title to describe the chart.
Axis title, labels and limit	Specifies if and how you want titles and scale labels to appear on the axes of your chart.
Chart series	Formats elements of the appearance of a chart series, such as the color, line width, and line symbols. You can also apply rule-based formatting, such as applying a certain color when a position of the series is equal to a specified value.
Tick Marks	Subdivides the scale markers on an axis, to enhance detail.
Data Labels	Shows the numeric value of data as you pause the mouse over the chart.

Adding or Modifying Chart Views

The following procedure provides the basic steps to add or modify a chart view.

NOTE: If you select a chart graph that is incompatible with the results, no results are shown.

To add or modify a chart view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new chart view, click Add View, and then select Chart.
- To edit an existing chart view, click the Edit View button for the chart view.

The workspace shows the options and settings for the view.

- 2 Make your selections in the chart Graph, Type, and Style fields.

Your selection in the Graph field, such as Pie or Line, determines the available choices for the Type and Style. For some graphs, only a default subtype or style is available.

As you make selections from the drop-down lists, the Chart view changes to reflect your selections.

TIP: You can add columns to the chart while you are in the Chart View page, by clicking the name of the field for each column in the Active Subject Area. Alternatively, you can navigate to the Define Criteria page to add additional columns. Any columns that you add in the Chart View page are added to the report overall; you can see columns in the Define Criteria page and also in other views, as well as in the Chart View page. To delete a column from the chart, you must navigate to the Define Criteria page, and click the Remove Column button for the column.

- 3** Use the buttons at the top of the Chart View page to specify additional chart settings.
- 4** To see the effects of your changes, click Redraw.
You can click Redraw at any time to refresh the Chart view.
- 5** To remove changes and start from the original chart, click Restore Default.
- 6** To resize the chart, use the vertical and horizontal slide bars.
- 7** Save the report.

Specifying General Chart Properties in Chart Views

You can set general properties for the chart, such as a title and the appearance of data labels.

Data labels are enabled by default for selected 2D chart types.

The default setting for the chart size is to scale all elements of the existing chart, including height and width, to fit the available space. The height and width of the chart remain proportional to each other when the size of the chart changes. The chart automatically resizes the chart elements. The revised size is based on the space available within the chart. You can specify a fixed size for the chart in the General Chart Properties dialog box. The fixed size overrides the default size.

NOTE: The chart can expand significantly if the number of items being charted grows substantially.

For example, suppose you create a report to display the sales of three products, create a chart of the results with the product sales shown as three columns, and size the chart to occupy about 25 percent of the page. If the report is run later and six products are returned, the chart is expanded to twice its original width, or about 50 percent of the page, so that the widths of the individual columns in the chart remain constant.

The chart elements are resized as needed to fit into the chart. Using the preceding example, the chart continues to occupy about 25 percent of the page, and the columns are resized to fit in the available space.

To specify general properties for a chart view

- 1** Click the following button at the top of the Chart View page to open the General Chart Properties dialog box:



- 2** In the General Chart Properties dialog box, make your selections, and click OK.
The chart view refreshes. The chart might resize to accommodate your selections.

Controlling the Display of Grid Lines in Chart Views

You can control whether grid lines display on the chart, and specify grid line colors.

To control the display of grid lines on a chart view

- 1 Click the following button at the top of the Chart View page to open the Additional Charting Options dialog box:



- 2 In the Additional Charting Options dialog box, click the Grid Lines tab, make your selections, and click OK. The chart view refreshes.

Specifying the Location of the Legend in Chart View

You can specify the location of the legend, and set the options for resizing the legend.

To specify the location of the legend on a chart view

- 1 Click the following button at the top of the Chart View page to open the Additional Charting Options dialog box:



- 2 In the Additional Charting Options dialog box, click the Legends tab, make your selections, and click OK. The chart view refreshes. The chart might resize to accommodate your selections.

Setting Colors for the Background, Text, and Borders in Chart View

You can specify the color for the chart background, text, and borders.

To specify the background, text, and border colors in a chart view

- 1 Click the following button at the top of the Chart View page to open the Additional Charting Options dialog box:










- 2 In the Additional Charting Options dialog box, click the Borders & Colors tab, make your selections, and click OK. The chart view refreshes.

Selecting the Columns to Display as Axes in Chart View

You can select which columns appear in the chart and which axes represent those columns. Oracle CRM On Demand Answers displays a matrix of the appropriate options. The left edge of the matrix lists the columns, and the top edge lists the axes types available for the chart type you are using. You can also indicate whether measure labels appear for factual data plotted on an axis.

The available axes change depending on the type of chart selected from the Graph drop-down list. The chart axis buttons used in chart view are described in the following table.

Chart Axis Button	Axis
	Sets the selected column as a level axis, which is for scatter and bubble graphs.
	Sets the selected column as the horizontal axis.
	Sets the selected column as the vertical axis. For a radar graph, this is the fact axis.
	Indicates if the selected column's values should appear in the chart legend
	Sets the selected column as an overlay axis. This is for a line bar combo graph.
	Sets the selected column as the radius axis. This is for a bubble graph.
	Sets the selected column as a pie values axis. For a radar graph, this is the radar axis.

To select the columns to display as the axes on a chart view

- 1 In the columns area to the left of the chart, click the appropriate check box for one of the axis buttons to display that column as the corresponding axis in the chart.

The axis buttons change depending on the type of graph selected from the Graph drop-down list.

- 2 To add a column to the chart, click the column in the selection area, and then set it as an axis.
This is equivalent to adding the column to the report at the Define Criteria page.

- 3 Click Redraw to refresh the chart view.

Specifying Axis Scaling Options in Chart View

You can control the axis limits, tick marks, and scale type, and the properties of scale markers.

To specify axis scaling options for a chart view

- 1 Click the following button at the top of the Chart View page to open the Axis Scaling dialog box:



- 2 In the Axis Scaling dialog box, make your selections, and click OK.

For charts with numeric axes, the settings of the axis scaling options determine how the scale is selected:

- When you select Default, Oracle CRM On Demand Answers selects the scale and sets the axis to zero (0) for positive numbers.
- When you select Zoom to Data Range, Oracle CRM On Demand Answers selects the scale. It evaluates the range of values on the axis and selects the appropriate minimum and maximum values for the scale. This feature is useful when charting a set of large values that are all within a small percentage of each other. The chart zooms in on the values so differences are more easily distinguished.
- You can also manually set the axis scaling values to specific numbers.

The chart view refreshes. The chart might resize to accommodate your selections.

Editing Scale Markers in Chart View

Scale markers are accenting lines or shaded background ranges that mark key points, thresholds, ranges, and so on. The lines or ranges can be applied to one or more axes, depending upon the type of chart. Lines appear in front of the chart information, whereas ranges appear in the background.

NOTE: Some chart types, such as pie charts, do not use scale markers.

The following procedure provides the general steps to edit a scale marker.

To edit scale markers for a chart view

- 1 Click the following button at the top of the Chart View page to open the Axis Scaling dialog box:



- 2 In the Axis Scaling dialog box, click Edit Scale Markers.
- 3 In the Scale Markers dialog box, click Add to add the first scale marker, and make your selections for the marker.

Advanced options include setting the scale to a static value, a particular column name, or as the result of an SQL query. For more information about the types of scale markers and using the advanced options, see the procedures that follow this one.

- 4 Click OK successively to close the dialog boxes.

The chart view refreshes. The chart might resize to accommodate your selections.

To create a line scale marker

- 1 In the Scale Markers dialog box, in the Type field, select Line.

- 2 Enter a line width in the third column.

This value is the thickness of the line, in pixels.

- 3 Enter the position for the line in the fourth column.

The position indicates where the line will be located on the axis. For example, if your left axis has values from 0 to 100, and you specify a position of 40, you see a horizontal line intersecting the 40 position on the vertical axis.

- 4 Enter the color for the line.

- 5 Enter a caption for the line.

The caption appears when a user pauses the mouse over the line in the chart and in the legend.

- 6 Click OK.

To create a range scale marker

- 1 In the Scale Markers dialog box, in the Type field, select Range.

- 2 Enter the low end of the range in the third column.

- 3 Enter the high value of the range in the fourth column.

NOTE: You must specify values that appear on the same axis as the range. For example, if your left axis has values from 0 to 100, and you specify 20 for low and 40 for high, the graph background appears in the color that you specify for the range between those values.

- 4 Enter the color for the range.

- 5 Enter a caption for the range.

The caption appears in the legend.

- 6 Click OK.

Specifying Advanced Settings for Range and Line Values

The options for these values include: a static value, a value sourced from a column included in the report, or one derived from an SQL query.

To specify an advanced setting

- 1 Click the Properties button beside the field where you want to specify the advanced option.
- 2 Select one of the following options.
 - **Static Value.** Enter a numeric increment.
 - **Variable Expression.** This option is based on the results of a session and its presentation variables. This option is limited because most session or presentation variables might not be related to values on the chart.
 - **Column Name.** Choose a column on which to base the increment.
 - **SQL Query.** This option is based on the results of an SQL query. The results might be a table, but only the first row and first column cell value is applied.
- 3 Click OK.

Specifying Axis Titles and Labels in Chart View

You can specify the following for a chart view:

- Whether the axis titles and data labels display at the bottom and to the left of the chart
- Whether the labels are rotated to fit better in the chart
- The maximum label length
- The text for the label if it is different from the default text

NOTE: Adjusting the size of a chart can affect how the axis labels appear.

To specify an axis title on a chart view

- 1 Click the following button at the top of the Chart View page to open the Axis Titles and Labels dialog box:



- 2 In the Axis Titles and Labels dialog box, make your selections, and click OK.

The chart view refreshes.

NOTE: When you set the Limit label length, specify the total number of characters that a label can contain. Ellipsis points (...) appear where any additional characters have been removed.

Specifying What Happens When a User Clicks a Chart

When a user views the chart, you can specify the type of interaction to occur if the user clicks the chart. The following are the types of interactions for a chart:

- **Drill.** Allows the user to drill down to more detailed information. This is the default interaction if a path for the drilldown is automatically configured. If no path for the drilldown is initially available, use Navigate to configure a customized path.
- **Navigate.** Allows the user to navigate to another saved report or dashboard.
- **None.** Disables drilling down or navigation from the chart.

To specify what happens when a user clicks a chart

- 1 Click the following button at the top of the Chart View page to open the Additional Charting Options dialog box:



- 2 In the Additional Charting Options dialog box, click the Interaction tab, and make your selection for the interaction.
- 3 Click OK.

Formatting the Appearance of a Chart Series

Formatting a chart series allows users to customize individual series components. The formatting is based on their position. Users can format the appearance of a chart series, such as the color, line width, and line symbols.

For example, on a line bar combination chart with two data series, assume that the bar is position 1 and the line is position 2. Users can change the color of the bar, the width of the line, and the symbol representing the data points. Users can also apply rule-based formatting, such as applying a certain color when a position of the series is equal to a specified value.

To format the appearance of a chart series

- 1 Click the following button at the top of the Chart View page to open the Series Format Control dialog box:



- 2 In the Series Format Control dialog box, make your selections.

The choices available in the Series Format Control dialog box depend upon the chart type. For example, to do the following:

- To customize a series, deselect the Use Default check box.
- To restore a series to its default settings, select the Use Default check box again.

- To add a new format series control, click the Add button. Even if the current chart does not use this series, it will be used if it is needed (such as for drilling).
- To return all series to their default values, click the Clear All button.
- To change colors, click the color box to access the Color Selector dialog box.
- To change other series attributes, click the appropriate tab, and select the bar or line attributes.

3 Click OK.

Making Selections for Data Labels in Pie Charts

Data labels appear when a user pauses the mouse over elements in the pie chart. You can specify how values appear and what the data labels display. You can show values as percentages of the total or as actual values. Data labels can display the value or name only, or both the value and name.

Depending on your selection, the chart might resize to allow the data labels to appear.

To make selections for data labels in pie charts

1 Click the following button at the top of the Chart View page to open the Chart Type Special dialog box:



2 In the Chart Type Special dialog box, make your selections for the value and the data label. Then click OK.

Showing Results in Pivot Tables

The Pivot Table view is an interactive view that allows you to rotate the rows, columns, and section headings to obtain different perspectives of the data. Pivot tables are navigable and drillable, and are especially useful for trend reports.

This topic describes the pivot table positions and provides instructions for performing the following tasks:

- Adding or modifying pivot table views
- Using Multiple page drop-down lists in pivot tables
- Overriding the default aggregation rules in pivot tables
- Adding formatting to pivot tables
- Displaying running sums in pivot tables
- Showing items as relative values in pivot tables
- Using calculations in pivot tables
- Building calculations in pivot tables

Pivot Table Positions

When you add or modify a pivot table, the columns included in the report appear as elements in the pivot table template.

The following table describes the pivot table positions.

Position	Description
Pages	Provides an interactive result set that allows users to select the data they want to view. The values from the columns that appear in the Pages position are used as the initial filter criteria. The values appear in a drop-down list for selection. Based on that selection, a pivot table (composed of the Sections, Columns, Rows, and Measures defined in the pivot table) appears.
Sections	Provides initial filter criteria. For each value in the Section column, a unique pivot table appears, composed of the Columns, Rows, and Measures defined in the pivot table.
Columns	Shows an element in a column orientation. Pivot tables can contain multiple columns.
Rows	Shows an element in a row orientation. Like columns, pivot tables can contain multiple rows.
Measures	<p>Populates the section of a pivot table that contains summary data. The elements in the Measures area are summarized based on the elements in the page, section, row, and column fields. Each value in the Measures elements represents a summary of data from the intersection of the source rows and columns.</p> <p>The Measure Labels element, which appears in the Columns area by default, controls the position and formatting of the column heading for the data in the Measures section. It also provides totaling and ordering capabilities. If there is only one measure, this element can be excluded.</p>
Excluded	Excludes columns from the pivot table results. Any column that is added as criteria for the report after the pivot table has been created is added as excluded.

Adding or Modifying Pivot Table Views

The following procedure provides the basic steps to add or modify a Pivot Table view.

To add or modify a Pivot Table view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new pivot table view, click Add View, and then select Pivot Table.
 - To edit an existing pivot table view, click the Edit View button for the pivot table view.

The workspace shows the options and settings for the view.

- 2** To view the pivot table template and buttons for working with each column individually, select the Show Controls check box.
The workspace shows the pivot table template.
- 3** Drag and drop the report columns, which appear as elements in the pivot table, to the desired positions in the pivot table template.
- 4** To see a preview, select the Display Results check box.
You can click the Display Results link to refresh the results.
- 5** To add a Chart view next to the pivot table, select the Chart Pivoted Results check box.
For information about the Chart view, see [Showing Results in Charts](#) (on page 865).
- 6** To change the location of the chart relative to the pivot table, select the location from the Chart Position list.
You can also choose to see only the chart and hide the table by selecting Chart Only from the list.
- 7** To sort the results, click the Order By button for the column on which you want to sort.
The button changes to indicate the sort order:
 - An up arrow indicates ascending sequence.
 - A down arrow indicates descending sequence.For more information about sorting, see [Sorting and Reordering Columns](#) (on page 858).
- 8** To add totals, perform the following actions:
 - a** For totals in the Pages, Sections, Rows, and Columns areas, click the Totals button and make a selection:
 - For no totals, select None. The Totals button appears with a white background (default).
 - To show the total before or after the data items, select Before or After. For example, if you add a total on a row containing regions and specify the Before option, the total is shown before individual districts in the region are listed.
 - b** For totals in the Measures area, click the More Options button for the row or column to be totaled, select Aggregation Rule, select a value, and make sure the option Report-Based Total is selected.
NOTE: If the option Report-Based Total is not selected, Oracle CRM On Demand Answers calculates the total based on the entire result set, before applying any filters to the measures.
Depending on the position of this element, the totals for the summary data represented by the Measures elements display as a column or row. Column and row totals include labels.
When the Totals button is dimmed, no totals will appear.
- 9** To work with additional options for a column, measure, or row, click the More Options button and make a selection from the drop-down list.
- 10** To format labels or values for a column, click the Totals button or the More Options button, and then select the appropriate format option.

- 11 Save the report.

Using Multiple Page Drop-Down Lists in Pivot Tables

When you place multiple attributes in the Pages area in the pivot table, you can create a multiple drop-down list page. Then, when users view the pivot table, they see a drop-down list for each attribute, rather than a concatenated list of attributes placed in the page heading (the default).

For example, if you place Region and Brand in the pages area, a Region drop-down list allows the user to select a particular region, and see the data for only that region, rather than seeing Region concatenated with Brand.

To create an independent drop-down list in an Oracle CRM On Demand Answers pivot table

- 1 Drag and drop your target attributes into the Pages area.
- 2 Click the More Options button on the second (or any subsequent) attribute in the Pages layout area.
- 3 Select the option Start New Page Drop Down.

The drop-down list for the attribute appears above the preview of the pivot table.

You can create drop-down lists for other attributes in the Pages area. When the report is saved, the drop-down lists will be available to users with access to the report.

Overriding Default Aggregation Rules in Pivot Tables

You can override the default aggregation rule for a measure, which is specified by either the original author of the report or by the system.

To override the default aggregation rule for a measure in a pivot table

- 1 Click the More Options button for the measure whose default aggregation rule you want to override.
- 2 Select the option Aggregation Rule, and then select the aggregation rule to apply.

Adding Formatting in Pivot Tables

You can apply green bar styling and cosmetic formatting to a pivot table. You can also customize the appearance of sections, rows, columns, measures, and the content that they contain.

For example, you can specify font, cell, border, and style sheet options for sections, values, and measure labels. For sections, you can include and customize the position of column headings together with the values in that section. You can also insert page breaks, so that every time a value changes in the section, the new section appears on a new page.

You can also add conditional formatting, which helps direct attention to a data element if it meets a certain threshold. To add conditional formatting to a column in a pivot table, see [Editing Column Properties](#) (on page 843).

Adding Green Bar Styling and Cosmetic Formatting to a Pivot Table

Green bar styling shows alternating rows or columns in a light green color. Cosmetic formatting affects the overall appearance of the pivot table and also allows you to change the default green bar color.

To add green bar styling and cosmetic formatting to a pivot table

- 1** In the pivot table view, click the Pivot Table View Properties button near the top of the workspace.
- 2** To add green bar styling, select the Enable Alternating Row Green Bar Styling check box.
To change the way the styling is applied, make a selection from the Alternate list.
- 3** To add cosmetic formatting, click the Set Alternate Format button.
- 4** In the Edit Format dialog box, to change the default green bar color, select a new background color for the cell format.
For more information about cosmetic formatting, see [Changing the Appearance of Reports](#) (on page 831).

Adding Formatting for Sections and Section Content

Section and content formatting options allow you to do the following:

- Include and customize the position of column headings together with the values in that section.
- Insert page breaks. Every time a value changes in the section, that new section will appear on a new page. This is useful for data-driven detail reports.
- Apply cosmetic formatting to a section and its content.

To add formatting for sections in a pivot table

- 1** To format the appearance of a section, do the following:
 - a** In the pivot table view, click the Section Properties button.
 - b** In the Section Properties dialog box, make your selections, and click OK.
- 2** To format the appearance of the section content, do the following:
 - a** Click the Content Properties button.
 - b** In the Content Properties dialog box, make your selections and click OK.

For information about applying cosmetic formatting, see [Changing the Appearance of Reports](#) (on page 831).

Adding Formatting for Rows

Row and row content formatting options allow you to do the following:

- Apply cosmetic formatting to rows, row headings, and row values.
- Use a row in pivot table calculations but suppress its display in results.
- Define a new calculated item for use in a pivot table.
- Duplicate the row in the pivot table.
- Remove a column from the pivot table view.

To add formatting for rows

- In the pivot table view, click the More Options button for the row and make a selection from the drop-down list:
 - To apply cosmetic formatting to row headings or values, select the appropriate option.
 - For information about applying cosmetic formatting, see [Changing the Appearance of Reports](#) (on page 831).
 - To hide a row from the output, select Hidden.
 - To define a new calculated item, click New Calculated Item.
For more information on defining calculated items, see the Building Calculations in Pivot Tables section of this topic.
 - To duplicate the row in the pivot table, select Duplicate Layer.
 - To remove the column from the report, select Remove Column.
 - The column is removed from the pivot table and all other result views for the report.

NOTE: The Data Format settings for columns included in the Measures area inherit the settings for columns in the section.

Displaying Running Sums in Pivot Tables

Numeric measures in a pivot table can be displayed as running sums, where each consecutive cell for the measure displays the total of all previous cells for that measure. This option is a display feature only that has no effect on actual pivot table results.

Typically, running sums would be displayed for duplicated columns or for measures for which the option to show data as a percentage of the column has been selected, with the last value being 100 percent. Running sums apply to all totals. The running sum for each level of detail is computed separately.

Column headings are not affected when the running sum option is selected. You can format the column heading if you want it to indicate that the running sum option is in effect.

The following usage rules are in effect for running sums:

- A running sum is incompatible with the SQL RSUM function (the effect would be a running sum of the running sum).
- All running sums are reset with each new section. A running sum does not reset at a break within a section or continue across sections.

- If a measure does not display in a single column or in a single row, the measure is summed left to right and then top to bottom. (The lower right cell will contain the grand total.) A running sum does not reset with each row or column.
- Rolling minimums, maximums, and averages are not supported.

To display a measure as a running sum

- In the Measures area, click the More Options button for the row or column to be summed and select the following option:
Display as running sum

Showing an Item's Relative Value in Pivot Tables

You can dynamically convert a stored or calculated measure on a pivot table into a percent or an index. This shows the relative value of the item, compared to the total, without the need to explicitly create a calculation for it.

For example, if you are using a pivot table to examine sales by region, you can duplicate the sales measure and view it as a percentage of the total. This allows you to see the actual sales, and the percentage of sales, that each region accounts for.

You can view the measure as a percentage between 0.00 and 100.00, or as an index between 0 and 1. Deciding which method to use is at your discretion.

To show an item as a relative value in a pivot table

- 1 In the pivot table view, click the More Options button to make the column show as a relative value.
The following step is optional. When you duplicate the measure in the pivot table, you can display both the total for the measure and its relative value. This eliminates the need to add the column twice on the Define Criteria page to display the total and its relative value in the pivot table.
- 2 To duplicate the measure, choose Duplicate Layer.
The measure appears a second time in the pivot table, with the same name. To rename the measure, click More Options and choose Format Headings, then enter the new name in the first field.
- 3 Click More Options and choose Show Data As, choose either Percent of or Index of, and then choose the appropriate submenu option.

NOTE: The option Show Data As is available only for items that are stored or calculated measures.

The options for Percent of and Index of are:

- Column
- Row
- Section
- Page
- Column Parent

- Row Parent
- Layer (If you choose layer, then you must also choose a column in the report by which to group the percentages.)

Using Calculations in Pivot Tables

You can use calculations in a pivot table to obtain different views of the data. The calculations allow you to override the default aggregation rule specified in the system, and for an existing report, the aggregation rule chosen by the author.

The following table describes the calculations that you can use in pivot tables.

Calculation	Description
Default	Applies the default aggregation rule as defined in the Oracle CRM On Demand Answers repository or by the original author of the report.
Sum	Calculates the sum obtained by adding up all values in the result set. Use this on items that have numeric values.
Min	Calculates the minimum value (lowest numeric value) of the rows in the result set. Use this on items that have numeric values.
Max	Calculates the maximum value (highest numeric value) of the rows in the result set. Use this on items that have numeric values.
Average	Calculates the average (mean) value of an item in the result set. Use this on items that have numeric values. Averages on pivot tables are rounded to nearest whole number.
First	In the result set, selects the first occurrence of the item.
Last	In the result set, selects the last occurrence of the item.
Count	Calculates the number of rows in the result set that have a nonnull value for the item. The item is typically a column name, in which case the number of rows with nonnull values for that column are returned.
Count Distinct	Adds distinct processing to the Count function. This means that each distinct occurrence of the item is counted only once.
Formula	Opens a toolbar that lets you select mathematical operators to include in the calculation.
Server Complex Aggregate	This setting forces the aggregation rule to be determined and calculated by the Analytics Server, rather than the Pivot table. It issues an 'AGGREGATE(x by y)' statement which the Analytics server interprets to mean: use the most appropriate aggregation rule for measure 'x' to get it to level 'y'.
None	No calculation is applied.

For more information about SQL functions, see [Using Functions in Analyses](#) (on page 912).

Building Calculations in Pivot Tables

You can build calculations for items in the Pages, Sections, Rows, and Columns areas.

To build a calculation for an item in a pivot table

- 1 In the Sections or Rows area, click the More Options button for the measure on which you want a calculation performed.
- 2 Select the option New Calculated Item.
The Calculated Item window appears.
- 3 Assign a name for the calculation in the Name field.
- 4 To build a calculation other than a formula, select from the following options:
 - To build one calculation, select the function to work with from the Function drop-down list, and click on one or more items in the Values list to add them to the Function field.
 - To build multiple calculations for multiple items, type the functions and click on the item names to add them to the Function field.
 - If you are averaging a column with a type of integer, change the formula for the column to cast it to a double (floating point) type. For example, if the current formula is x, change it to CAST(x as double).

NOTE: Averages on pivot tables are rounded to the nearest whole number.

- 5 To build a formula, select the Formula function.

NOTE: A formula creates a dynamic custom grouping within the pivot table. All measures referenced in a formula must be from the same logical column and must be present in the results. Formulas can be inserted into, or combined with, other calculations.

The mathematical operators become visible. The operators are shown in the following table.

Operator	Description
+	Plus sign, for an addition operation in the formula.
-	Minus sign, for a subtraction operation in the formula.
*	Multiply sign, for a multiplication operation in the formula.
/	Divide By sign, for a division operation in the formula.
\$	Dollar sign, for acting upon the row position of an item in a formula.
(Open parenthesis, to signify the beginning of a group operation in the formula.
)	Close parenthesis, to signify the ending of a group operation in a formula.

- a In the Function field, build the formula by typing or clicking measure names, and clicking operators to insert them into the formula.
- b Use parentheses, where appropriate.

- 6 When the calculation is complete, click Finished.

If any errors are detected, a message will appear. Correct the error and click Finished again.

Examples of Calculations in Pivot Tables

The examples and explanations in this section assume that you have a basic understanding of SQL and its syntax. The examples are hypothetical. Not all possible calculations are shown.

Example 1. This example obtains the value of the current measure, such as dollar sales, for each of the products SoftDrinkA, SoftDrinkB, and SoftDrinkC, and adds the values together.

```
sum('SoftDrinkA','SoftDrinkB','SoftDrinkC')
```

This is equivalent to selecting Sum from the Function drop-down list, and then typing or clicking 'SoftDrinkA','SoftDrinkB','SoftDrinkC' to add them to the Function field.

Example 2. This example obtains the minimum current measure, such as dollars in sales, for SoftDrinkA or SoftDrinkB, whichever is lower.

```
min('SoftDrinkA','SoftDrinkB')
```

In Example 1 and Example 2, each functional calculation is performed for each item in the outer layer, such as the Product layer. For example, if Year and Product are laid out on an axis, and one of the preceding calculations is built on the Product layer, the results will be computed per year.

Example 3. This example obtains the values for each item in the outer layer, such as Year and Product, and adds them together.

```
sum(*)
```

Example 4. This example obtains the current measure, such as dollar sales, of the item from the first, second, and third rows, and sums them.

```
sum($1,$2,$3)
```

Instead of specifying a named item, such as SoftDrinkA, you can specify \$n or \$-n, where n is an integer that indicates the item's row position. If you specify \$n, the measure is taken from the nth row. If you specify \$-n, the measure is taken from the nth to the last row.

For example, for dollar sales, \$1 obtains the measure from the first row in the data set, and \$-1 obtains the measure from the last row in the data set.

Example 5. This example adds sales of SoftDrinkA, SoftDrinkB, and SoftDrinkC.

```
'SoftDrinkA' + 'SoftDrinkB' + 'SoftDrinkC'
```

This is equivalent to the following calculation:

```
sum('SoftDrinkA','SoftDrinkB','SoftDrinkC')
```

Example 6. This example adds sales of SoftDrinkA with sales of diet SoftDrinkA, then adds sales of SoftDrinkB with sales of diet SoftDrinkB, and then returns the maximum of these two amounts.

```
max('SoftDrinkA' + 'diet SoftDrinkA', 'SoftDrinkB' + 'diet SoftDrinkB')
```

Showing Results as Gauges Using Gauge View

Use the gauge view to show results in gauges. Gauges are useful for showing performance against goals. Supported gauge types include dial, bar, and bulb-style gauges.

You can select the type of gauge and customize its appearance, including the title, the ranges to show, how many gauges to display in a row, and other characteristics such as gauge width and dial and indicator needle size. You can also set thresholds, borders and colors, and control other gauge characteristics.

Gauges are navigable. When a user clicks it, you can direct the user to another saved report.

This topic describes the gauges and gauge view settings. It also provides instructions for performing the following tasks:

- Adding or modifying gauge views in Oracle CRM On Demand Answers
- Setting the general background properties in a gauge view
- Adding titles and footers to a gauge view
- Adding gauge ranges to a gauge view
- Specifying additional properties in gauge views
- Setting the advanced properties for dials in dial gauges

Gauges in Oracle CRM On Demand Answers

This section describes gauge types, subtypes, and sizes.

Gauge Types

The following table shows the gauges available from the Gauge drop-down list and describes their uses. The default gauge is a dial gauge.

Gauge Type	Description
Dial	A dial gauge shows data using a dial with one or more indicator needles that change position to indicate where the data falls within predefined limits.
Bar	A bar gauge shows data using a single bar that changes color to indicate whether the data is within predefined limits.
Bulb	A bulb gauge shows data using a circle that changes color to indicate whether the data is within predefined limits. An array of bulb gauges is particularly useful for scorecard-type output.

Gauge Subtypes

Your selection for the gauge type determines the gauge subtypes that are available from the Type drop-down list. The dial gauge has no subtype. Gauge subtypes include the following:






- Bar gauges: Filled and LED-style. The default subtype is filled.
- Bulb gauges: 3-dimensional (3D) and 2-dimensional (2D). The default subtype is 3D.

Gauge Sizes

Gauge sizes include small, medium, large, and custom. The default size is medium.

Gauge View Settings in Oracle CRM On Demand Answers

The buttons at the top of the gauge view page provide access to various gauge settings. The following table describes the gauge view buttons and settings.

Gauge View Button	Description
	Gauge Canvas Properties. Allows you to set the general properties for the background on which the gauge appears.
	Gauge Titles. Allows you to specify a title, a subtitle, a footer, and a secondary footer for the gauge.
	Gauge Ranges. Allows you to specify the ranges that can be represented in the gauge.
	Additional Gauge Properties. Allows you to specify additional gauge properties, including control over the appearance of elements within the gauge, setting properties for gauge limits and tick marks, and specifying the interaction to occur when a user clicks the gauge.
	Advanced Properties. Allows you to set the advanced properties for the dial in a dial gauge, including how scale labels are displayed, and the arc length and thickness of the dial.

Adding or Modifying Gauge Views in Oracle CRM On Demand Answers

The following procedure provides the basic steps to add or modify a gauge view.

NOTE: If you select a gauge type that is incompatible with the results, no results are shown.

To add or modify a gauge view in Oracle CRM On Demand Answers

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new gauge view, click Add View, and then select Gauge.
 - To edit an existing gauge view, click the Edit View button for the gauge view.

The workspace shows the options and settings for the view.
- 2 Make your selections in the Gauge, Type, and Size fields.
- 3 For all gauge types, use the Measures drop-down list to select the measure to gauge.

- 4** For dial gauges:
 - a** Use the Marker Type drop-down list to select the indicator needle to use, such as a compass, arrow, or line.
 - b** To select a color for the indicator needle, click the Color field and make a selection.
 - c** To add another indicator needle, click Add Marker.
- 5** Use the buttons at the top of the gauge view page to specify additional gauge settings.
- 6** To remove changes and start from the default gauge view, click Restore Default.
- 7** Save the report.

Specifying General Gauge Background Properties in a Gauge View

You can set general properties for the background on which the gauge appears, such as whether to display a title and whether a legend appears with each gauge. You can also specify a background color, a color for the title, whether to show a border around the background, the number of gauges to show per row, and the space between them.

To set general background properties for a gauge view

- 1** Click the Gauge Canvas Properties button at the top of the gauge view page.
- 2** In the Gauge Canvas Properties dialog box, make your selection for a title, as follows:
 - To show the name of the measure, do not select the Override Default check box, and leave the title text field empty.
 - To show a different title, select the Override Default check box, and enter the title text.
 - If you do not want a title to appear on the background, select the Override Default check box, and leave the title text field empty.
- 3** For the legend, make a selection from the list, or, if you want to suppress the display of the legend, select None.

The default location for the legend is below the title.
- 4** To set a background color for the area on which the gauge appears, click the Background Color field, and make a selection.
- 5** To show the title in a color, click the Text Color field, and make a selection.
- 6** To show a border along the edges of the background, click the Border Color field, and make a selection.
- 7** Specify the number of gauges to appear per row, and the space between them.

The space between gauges is measured in pixels.
- 8** Click OK.

The gauge view refreshes. The view may resize to accommodate your selections.

Adding Titles and Footers in Gauge View

You can specify a title, a subtitle, a footer, and a secondary footer for the gauge. If the background holds multiple gauges, titles and footers appear for each gauge. Titles and footers are optional.

To add titles and footers in a gauge view

- 1 Click the Gauge Titles button at the top of the gauge view page.
- 2 In the Gauge Titles dialog box, type the text to use, and click OK.

NOTE: As with the Narrative view, you can use @n to include the results from the designated column in the gauge titles. For example, @1 inserts the results from the first column, and @3 inserts the results from the third column. For more information, see [Adding Narrative Text to Results](#) (on page 900).

The gauge view refreshes.

Adding Gauge Ranges in Gauge View

Gauge ranges identify the minimum and maximum values for each range and include a color in which the range will appear in the gauge, such as green for acceptable, yellow for warning, and red for critical.

You can set gauge ranges to a static value, the column name of the measure, or as the result of an SQL query.

To set a gauge range in a gauge view

- 1 Click the Gauge Ranges button at the top of the gauge view page.
- 2 In the Gauge Ranges dialog box, do the following:
 - a Type a caption for the range.
 - b To set the minimum and maximum gauge ranges, click the Properties button, and make a selection from the Advanced Options dialog box.
 - c To specify the color for the range, click the Color field, and make a selection.
- 3 Click OK.

The gauge view refreshes.

Specifying Additional Properties for a Gauge in Gauge View

Additional gauge properties include control over the appearance of elements within the gauge, setting properties for scale items such as gauge limits and tick marks, and specifying the interaction to occur when a user clicks the gauge. These properties are set in the Additional Gauge Properties dialog box.

Choices for the appearance of a gauge appear on the Appearance tab and include the following items:

- Whether data labels appear.
Data labels can always appear, appear only when a user pauses the mouse over elements in the gauge, or never appear.
- Selections for a background color for the gauge, the color of text within the gauge, and a border around the gauge.
- The height and width of the gauge, in pixels.

Choices for scale properties appear on the Scale tab and include the following items:

- Default or custom gauge limits.
- The number of major and minor tick marks.

Choices for the user interaction with the gauge appear on the Interaction tab and include the following actions:

- **Navigate.** Allows the user to navigate to another saved report or dashboard.
- **None.** Disables navigation from the gauge.

You can also set advanced properties for the Bar gauge type by clicking the icon.

To specify additional properties in a gauge view

- 1 Click the Additional Gauge Properties button at the top of the gauge view page.
- 2 In the Additional Gauge Properties dialog box, make your selections from the Appearance, Scale, and Interaction tabs.
- 3 Click OK.
The gauge view refreshes.

Setting Advanced Properties for the Dial in a Dial Gauge

Advanced properties allow you to specify whether scale labels should appear and what value they should show, set the dial arc length, and select the thickness of the dial.

The following choices are available for the display of scale labels:

- Percentage of total
- Actual value

The dial arc length is expressed in degrees. For example, specifying 360 results in a dial gauge that is a complete circle.

The dial thickness is expressed in pixels. As you specify larger values, the gauge becomes thicker, and the inner perimeter of the dial becomes smaller. Specifying extremely large values relative to the dial size may cause the gauge to become distorted and is not recommended.

To specify advanced properties for the dial in a dial gauge

- 1** Click the Advanced Properties button at the top of the gauge view.
- 2** In the Dial Specific Properties dialog box, make your selection to indicate how the scale labels are displayed.
To suppress the display of scale labels, select None.
- 3** To set the dial arc length and dial thickness, click the option to specify them manually and enter values.
- 4** Click OK.
The gauge view refreshes.

Showing Filters Applied to Results

Use the filters view to show the filters in effect for a report. For information about adding filters to a report, see [Adding Filters to Columns](#) (on page 835).

To add or modify a Filters view

- 1** In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new filters view, click Add View, and then select Active Filters.
 - To edit an existing filters view, click the Edit View button for the filters view.The workspace shows the filters view.
- 2** When you are done, click OK.
- 3** Save the report.

Adding Markup Text to Results

Use the Static Text view to add or edit markup text to appear with the results. You can add markup text that contains formatted text, ActiveX controls or JavaScript, sound bites, animation, specialized logos, and so on. The markup text may contain anything that is supported by your browser.

This section provides the procedure to add or modify a Static Text view and some examples of static text. If you find an example that is similar to what you want to do, you can copy it and tailor it to your needs.

To add or modify a Static Text view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new static text view, click Add View, and select Static Text.
 - To edit an existing static text view, click the Edit View button for the static text view.

The workspace shows the Static Text view.

- 2 Enter the markup text into the text box.

To make text appear bold, in italics, or underlined, click the appropriate button to insert the beginning and ending HTML tags, and then type the text between the tags, or select the text first and then the formatting button.

NOTE: To include a line break, use the Line Break button. Pressing Enter does not result in multiple lines of text.

The following table describes several examples.

Static Text View Example	Description and Usage Notes
HTML text	<p>Paste or type the HTML (or appropriate formatted text) into the text box. You can also click the HTML tag buttons. Based on the format of the text you are entering, markup tags may be used to control the format of the text. The following are some examples of what you can do:</p> <ul style="list-style-type: none">■ To set font size and color: <code>Red Text</code>■ To combine tags for additional effects: <code>Bo1d Red Text</code>
ActiveX object	<p>The Active-X object must be self-contained and supported by your browser. Paste or type the object into the HTML Text window, making sure to include the beginning and ending tags <code><object...></code> and <code></object></code>.</p>
JavaScript or VBScript	<p>The script must be self-contained and supported by your browser. Paste or enter the script into the text box, making sure to include the beginning and ending tags <code><script></code> and <code></script></code>.</p>

Static Text View Example	Description and Usage Notes
Audio	<p>Make sure you know where the audio clip is located. If the audio clip is for use in a shared environment, it must be located on a network drive accessible to all users.</p> <p>Use the HTML tag <EMBED> to add audio, in the following format:</p> <pre><EMBED SRC="audio" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED></pre> <p>where:</p> <ul style="list-style-type: none"> ■ <i>"audio"</i> is the location and name of the audio clip. <p>To add an audio clip located on your hard drive, the following HTML is an example:</p> <pre><EMBED SRC="c:\mycomputer\MIDIfiles\wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED></pre> <p>To add the same audio clip from a shared location on your Web server, the following HTML is an example:</p> <pre><EMBED SRC="http://ourwebserver.company.com/sounds/wakeup.mi d" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED></pre>
Background image	<p>The following example uses JavaScript.</p> <p>Make sure you know where the image to use as the background is located. If the image is for use in a shared environment, it must be located on a network drive or Web site accessible to all users.</p> <p>If the image is located in a shared dashboard files folder, the following is example HTML:</p> <pre><script language="javascript"> document.body.background = "http://ourwebserver.company.com/graphics/"NameOfGrap hic";</script></pre> <p>where:</p> <ul style="list-style-type: none"> ■ <i>NameOfGraphic</i> is the name of the file to use, such as bricks.gif or sand.jpg.

- 1 To apply cosmetic formatting to the font used in the static text view, click the Format View button.
- 2 To import the font formatting from a previously saved view, click the Import Formatting from Another Analysis button, and navigate to the saved view.
- 3 When you are finished, click OK.
- 4 Save the report.

Adding Legends to Reports Using Legend View

Use the Legend view to document the meaning of special formatting used in a report, such as the meaning of custom colors applied to gauges.

For example, you may use conditional formatting in a report to show critical items in the color red and items that need attention in the color yellow. You can add a legend with text that documents the meaning of the colors and captions that summarize the appropriate action. You can use cosmetic formatting to make the background colors of the text match the colors in the conditional report.

To add or modify a legend view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new legend view, click Add View, and select Legend.
- To edit an existing legend view, click the Edit View button for the legend view.

The workspace shows the legend view.

2 In the Captions field, select where you want the caption to be displayed.

The options are Right, Left, or None. If you do not want a caption to be displayed, select None.

3 In the Legend Items per Row field, select the number of legend items that you want for each row.

4 (Optional) Enter a title for the legend, such as Legend.

5 In the first Caption text box, type the meaning of the condition, such as Requires Immediate Attention.

6 In the first Sample Text text box, type the first condition you want to document, such as Critical.

You can use the common formatting dialog box to set the background color, such as red. Entering text is optional. You can just set a background color if desired.

7 To add another caption, click the Add Item button.

8 When you finish adding captions, click OK.

9 Save the report.

Allowing Users to Change Columns in Reports

Use the Column Selector view to allow users to dynamically change which columns appear in a report. One column selector can be attached to each column in a specific report, and multiple columns (attributes) can be attached to each column selector.

To add or modify a Column Selector view

1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new column selector view, click Add View, select Advanced, and then select Column Selector.
- To edit an existing column selector view, click the Edit View button for the column selector view.

The workspace shows the options and settings for the view.

- 2 Select the Enable check box for each column in which you want a column selector to appear.
- 3 Enter a Column Label for each selector and select a Label Position for the label.
NOTE: If you do not enter a label, users viewing the results will not see a label on the selector.
- 4 If you want results to be refreshed as soon as a user selects any new choice from a column selector, select the Automatically refresh when a new column is selected check box. If you clear this check box, users will see a Go button next to the column selectors, and must click Go to see the new results.
- 5 Select the Display Results check box to preview the column selector view.
- 6 Click OK to return to the Layout Views page.
- 7 To move or edit the column selector view (and other views, as required) on the page, do the following:
 - To move a view to a different location on the page, drag the view, and drop it in the new location.
 - To format the appearance of the column selector view, click the Format View button for the view.
You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).
 - To edit the column selector view, click the Edit View button for the view.
 - To delete the column selector view, click the Delete View button for the view.
- 8 When you finish making your changes, save the report.

Allowing Users to Select a Specific View Using View Selector View

Use a View Selector view to select a specific view of the results from among the saved views. When placed on a report, the view selector appears as a drop-down list for users to select the specific result view they want to see.

To add or modify a View Selector view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new view selector view, click Add View, select Advanced, and then select View Selector.
 - To edit an existing view selector view, click the Edit View button for the view selector view.

The workspace shows the view selector view.

- 2 (Optional) Type a caption for the view selector and indicate where the caption should appear relative to the view selector.
- 3 Make your selections for the view choices that you want to include in the view selector:
 - Select views from the Available Views box, and move them to the Views Included box.
 - In the Views Included box, click the Rename button to rename a selected view.

NOTE: The None view shows the selector only.
- 4 Select the Display Results check box to preview the view selector view.
- 5 Click OK to return to the Layout Views page.
- 6 To move or edit the view selector view (and other views, as required) on the page, do the following:
 - To move the view to a different location on the page, drag the view, and drop it in the new location.
 - To format the appearance of the view selector view, click the Format View button for the view.

You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).
 - To edit the view selector view, click the Edit View button for the view.
 - To delete the view selector view, click the Delete View button for the view.
- 7 When you finish making your changes, save the report.

Showing Results in Funnel Charts

Use the Funnel Chart view to show results as a three-dimensional chart that represents target and actual values and levels by color. Typically, funnel charts are used to graphically represent data related to stages in a process, such as the amount of potential revenue shown for each sales stage.

Funnel charts are well suited for showing actual compared to targets for data where the target is known to decrease (or increase) significantly per stage, such as a sales pipeline. You can click on one of the colored areas to drill down to more detailed information.

In funnel charts, the thresholds indicate a percentage of the target value, and colors provide visual information for each stage:

- All stages for which the actual value falls below the minimum threshold are colored in red.
- All stages for which the actual value falls below the maximum threshold are colored in yellow.
- All stages for which the actual value is greater than the maximum threshold are colored in green

To add or modify a Funnel Chart view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new funnel chart view, click Add View, select Advanced, and then select Funnel Chart.
 - To edit an existing funnel chart view, click the Edit View button for the funnel chart view.

The workspace shows the options and settings for the funnel chart view.

2 Make your selections for the fields in the workspace.

The following table describes the fields.

Funnel Chart View Workspace Field	Description
Chart Title	Specifies the title to display at the top of the chart.
Stage	Identifies the stage to represent, from the drop-down list. These values are shown on the horizontal axis.
Actual Value	Specifies the actual value for the stage, a column selected from the drop-down list.
Target Value	Specifies the target value for the stage, a column selected from the drop-down list.
Target value for final stage only	Indicates whether the target value should appear for each stage or for the final stage only.
Factor required to meet target	Identifies the factors required to meet targets.
Minimum Threshold	Specifies the minimum threshold. Values below this percentage will appear in red. Values between this percentage and the Maximum Threshold will appear in yellow.
Maximum Threshold	Specifies the maximum threshold. Values above this percentage will appear in green.
Size	Specifies the size.
Force standard shape and equal stage widths	Indicates whether Oracle CRM On Demand Answers automatically forces a standard shape and equal-stage widths in the chart.
Interaction	Indicates the level of interaction allowed in the chart. Choices include None, Drill, and Navigate.

3 Select the Display Results check box to preview the funnel chart view.

4 Click OK to return to the Layout Views page.

5 To move or edit the funnel chart view (and other views, as required) on the page, do the following:

- To move the view to a different location on the page, drag the view, and drop it in the new location.
- To format the appearance of the funnel chart view, click the Format View button for the view.
You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).
- To edit the funnel chart view, click the Edit View button for the view.
- To delete the funnel chart view, click the Delete View button for the view.

6 When you finish making your changes, save the report.

Adding Narrative Text to Results

Use the narrative view to add one or more paragraphs of text to appear with the reports. Narrative text is useful for providing information such as context, explanatory text, or extended descriptions. You can perform the following actions in the narrative view:

- Type a sentence with placeholders for each column in the results.
- Specify how rows should be separated.
- Use formatting buttons to make text bold, italic, or underlined, and insert line breaks.
- Apply cosmetic formatting to the fonts used in the narrative view, or import the font formatting from a previously saved view.

Example Usage Scenario for Narrative Text View

A user creates a report that returns the region name in the second column as part of the result set. The user wants the narrative view to appear as shown in the following example, with introductory text and each region listed on a new line:

This report shows your sales by region. The regions are:

East Region
West Region

The following table lists and describes the user’s narrative view entries:

Field	Entry	Explanation
Prefix	[b] This report shows your sales by region. The regions are:[/b][br][br]	<p>The entry prefixes the narrative with text. The text is formatted to appear in bolded type and is followed by two line breaks.</p> <p>The user positions the cursor into the Prefix text box and clicks the bold text button (B) to insert the tags to begin and end bolded text. The user types the following text between the tags:</p> <p>This report shows your sales by region. The regions are:</p> <p>The user then clicks the Line Break button twice.</p>
Narrative	@2	<p>The entry includes the results from the second column (the region name) in the narrative text.</p> <p>The user positions the cursor into the Narrative text box and types the characters @2.</p>
Row Separator	[br]	The entry starts each row of the narrative text on a new line.

Field	Entry	Explanation
		The user positions the cursor into the Row Separator text box and clicks the Line Break button twice.
Postfix	[br][b] End of Sales by Region report[/b]	The entry appends text to the narrative, in the same manner as the Prefix.

Reserved Characters in the Narrative View

In the narrative view, the following characters are reserved characters:

- @ (at sign, unless used as a column placeholder in the Narrative text box)
- [(left bracket)
-] (right bracket)
- ' (single quote)
- \ (back slash)

NOTE: If you want to include a reserved character, precede it with a backward slash character (\) to escape it. For example, to include a backward slash character in narrative text, type \.

Adding or Modifying Narrative Views

The following procedure provides the steps to construct a narrative view.

In the Prefix, Narrative, and Postfix text boxes, you can use the formatting buttons to make text appear in bold, italic or underlined type.

NOTE: To include a line break, use the Line Break button. Pressing Enter does not result in multiple lines of text.

To add or modify a narrative view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new narrative view, click Add View, select Advanced, then select Narrative.
 - To edit an existing narrative view, click the Edit View button for the view.

The workspace shows the options and settings for the narrative view.

- 2 Enter your selections for the fields in the workspace.

The following table describes the fields.

Narrative View Workspace Field	Comments
-----------------------------------	----------

Narrative View Workspace Field	Comments
Prefix	Specifies the header for the narrative. This text appears at the beginning of the narrative.
Narrative	Indicates the narrative text that will appear for each row in the results. Use @n to include the results from the designated column in the narrative. For example, @1 inserts the results from the first column in the narrative, and @3 inserts the results of the third column.
Row separator	Specifies a row separator tag. To use a separator other than the default for the format, enter the desired row separator in the Row Separator text box.
Postfix	Specifies the footer for the narrative. The text appears at the end of the narrative.

- 3 To apply cosmetic formatting to the font used in the narrative view, click the Format View button.
- 4 To import the font formatting from a previously saved view, click the Import Formatting from Another Analysis button, and navigate to the saved view.
- 5 Select the Display Results check box to preview the narrative view.
- 6 Click OK to return to the Layout Views page.
- 7 To move or edit the narrative view (and other views, as required) on the page, do the following:
 - To move the view to a different location on the page, drag the view, and drop it in the new location.
 - To format the appearance of the narrative view, click the Format View button for the view.
You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).
 - To edit the narrative view, click the Edit View button for the view.
 - To delete the narrative view, click the Delete View button for the view.
- 8 When you finish making your changes, save the report.

Showing Results in Scrolling Tickers

A ticker displays the results of a report as a marquee (moving results that scroll across the page). You can customize the size of the scroll area, the speed and direction in which the results scroll, and other display settings.

NOTE: If your Web browser does not support moving text, the results will appear, but they will not scroll across the page.

To add or modify a Ticker view

- 1 In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:

- To add a new ticker view, click Add View, select Advanced, then select Ticker.
- To edit an existing ticker view, click the Edit View button for the ticker view.

The workspace shows the options and settings for the ticker view.

- 2 To generate default settings for the most commonly used fields, click the Set Defaults button.

CAUTION: If you click the Set Defaults button after entering values in other fields, your entered values are cleared.

- 3 To clear all fields, click the Clear Fields button.

NOTE: After you clear all fields, you can click the Set Default button to restore default settings for the most commonly used fields.

- 4 Make your selections for the fields in the workspace.

The following table describes the fields.

Ticker View Workspace Field	Description
Behavior	<p>Specifies how the results move in the ticker:</p> <p>Scroll. The results start hidden, scroll on to the page, then off the page before repeating.</p> <p>Slide. The results start hidden, scroll on to the page, then stop once touching the other side.</p> <p>Alternate. The results bounce back and forward inside the marquee.</p>
Direction	Specifies the direction the results move in the ticker (Left, Right, Down, or Up).
Width	<p>Specifies the width of the ticker, either in pixels, or as a percentage of the page width.</p> <p>For example, a value of 200 indicates a width of 200 pixels, and a value of 25% indicates a width of one-quarter of the page.</p>
Height	<p>Specifies the height of the ticker, either in pixels, or as a percentage of the page height.</p> <p>For example, a value of 200 indicates a height of 200 pixels, and a value of 25% indicates a height of one-quarter of the page.</p>

Ticker View Workspace Field	Description
Beginning Text	<p>Specifies any optional text or graphics to display at the beginning of each redraw of the results. You can use HTML to format the text.</p> <p>If you include an image, make sure you know where the image is located. If the image is for your use only, the following is a sample location:</p> <p>c:\mycomputer\temp\report.gif</p> <p>If the image is for use in a shared environment or web site, it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:</p> <p>\\ALLUSERS\graphics\report.gif</p>
Row Format	<p>Specifies the HTML to use in formatting the rows in the results.</p> <p>To include the results from a designated column, use @n. For example, @1 inserts the results from the first column, and @3 inserts the results of the third column.</p>
Row Separator	Specifies the character that separates one row from another.
Column Separator	Specifies the character that separates one column from another. This is used when Row Format is blank, which results in all columns being displayed.
Ending Text	<p>Specifies any optional text or graphics to display at the end of each redraw of the results. You can use HTML to format the text.</p> <p>If you include an image, make sure you know where the image is located. If the image is for your use only, the following is a sample location:</p> <p>c:\mycomputer\temp\report.gif</p> <p>If the image is for use in a shared environment or web site, it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:</p> <p>\\ALLUSERS\graphics\report.gif</p>

NOTE: Several of these fields are pre-populated with HTML that provides initial formatting. Take care when editing this text, so that the original HTML is still valid. If you remove the HTML from one of the fields, you should remove it from the others, too, otherwise the ticker will not function correctly.

5 To specify additional options, perform the following actions:

a Click the Advanced button.

The Advanced Ticker Options dialog box appears.

b Make your selections for the advanced options and click OK.

The following table describes the advanced options.

Advanced Options in the Ticker View Workspace	Description
# of Loops	Specifies the number of times that the results will scroll. The default is an infinite number of times. You must specify a whole number.
Scroll Amount	Sets the number of pixels between successive redraws of the results. Larger values cause faster, less smooth scrolling.
Scroll Delay	Specifies the number of milliseconds between successive redraws of the results. Large values cause slower scrolling.
Background Color	Specifies the color to use for the background. Depending on what your browser supports, you can enter a color name such as yellow or blue, or use the 6-digit hexadecimal format, such as #AFEEEE for pale turquoise. (You can omit the number sign character from the hexadecimal format.)
Additional Marquee Attributes	Specifies other marquee options that your browser may support, such as ALIGN="top middle bottom" to align the ticker to the top, middle or bottom of the text around it. You can also add HTML to further customize the look of the ticker.

- 6 Select the Display Results check box to preview the ticker view.
- 7 Click OK to return to the Layout Views page.
- 8 To move or edit the ticker view (and other views, as required) on the page, do the following:
 - To move the view to a different location on the page, drag the view, and drop it in the new location.
 - To format the appearance of the ticker view, click the Format View button for the view.
You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).
 - To edit the ticker view, click the Edit View button for the view.
 - To delete the ticker view, click the Delete View button for the view.
- 9 When you finish making your changes, save the report.

Alerting Users to No Data

Use the No Results view to specify explanatory text to appear if the report does not return any results. The text can help users understand that there was no data.

To add or modify a No Results view

- 1** In Oracle CRM On Demand Answers, in the Create Layout page, perform one of the following actions:
 - To add a new No Results view, click Add View, select Advanced, then select No Results.
 - To edit an existing No Results view, click the Edit View button for the view.The workspace shows the No Results view.
- 2** Enter explanatory text into the Headline and Text boxes.
- 3** Select the Display Results check box to preview the No Results view.
- 4** Click OK to return to the Layout Views page.
- 5** To move or edit the No Results view (and other views, as required) on the page, do the following:
 - To move the view to a different location on the page, drag the view, and drop it in the new location.
 - To format the appearance of the No Results view, click the Format View button for the view.

You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).
 - To edit the No Results view, click the Edit View button for the view.
 - To delete the No Results view, click the Delete View button for the view.
- 6** When you finish making your changes, save the report.

Step 3: Defining Prompts (Optional)

To allow Oracle CRM On Demand Answers users to specify a filter value when they run a report, define a run-time prompt for the report. Runtime prompts are useful because reports may need to be filtered differently based upon different users or the dates that reports are run.

A runtime prompt differs from a prebuilt filter in that a filter is set up when the report is defined and cannot be changed without revising the report itself. For example, if you define a prompt on Account Type for the report, your employees are prompted to select which Account Type value to see when they run the report. If you define the prebuilt filter as a specific Account Type, such as Competitor, the filter is hard-coded and cannot be altered by the user at runtime.

You can create prompts on the Define Prompts page in Oracle CRM On Demand Answers. To access the Define Prompts page, either create a new analysis, as described in [Getting Started with Answers \(Custom Reports\)](#) (on page 698), or open an existing analysis in Oracle CRM On Demand Answers.

There are two types of prompts that you can create:

- **Column filter prompt**

A column filter prompt provides general filtering of a column within a report. A column filter prompt can present all choices for a column, or, it can present constrained choices for a column. For example, if a report contains a Region=East filter, constraining choices for the City column restricts the selections to cities in the East region only. This eliminates the selection of a mutually exclusive filter that could result in no data.

■ Image prompt

An image prompt provides an image that users click to select criteria for a report. For example, in a sales organization, users can click their territories from an image of a map to see sales information, or click a product image to see sales information about that product. Users who know how to use the HTML <map> tag can create an image map definition.

NOTE: In Oracle CRM On Demand Answers, you do not see the prompts in the Define Criteria, Create Layout, Define Prompts, and Review pages. The prompts are displayed when you preview the analysis, and the prompts are displayed when users run the analysis.

Related Topics

See the following topics for related information:

- [Adding Column Filter Prompts](#) (on page 907)
- [Adding Image Prompts](#) (on page 909)

Adding Column Filter Prompts

A column filter prompt allows users to select values to filter a column in a report. You can define the range of possible filter values and how the user selects the filter values for the report.

You define column filter prompts in the Define Prompts page in Oracle CRM On Demand Answers. When you have multiple column filter prompts constructed for a report, they are presented to the user one at a time, in the order they are listed, from top to bottom.

To add or modify a column filter prompt

- 1** In Oracle CRM On Demand Answers, in the Define Prompts page, click Create Prompt, and select Column Filter Prompt.
- 2** In the Prompt Properties dialog box, enter a caption for the column filter prompt in the Caption box.
The caption appears when a user runs the report.
- 3** Enter a description in the Description box (optional).
- 4** From the Filter on Column drop-down list, select the column in the report that you want to filter, and then, from the Operator drop-down list, select the operator to use.
If you want the user to select the operator, select the operator *Prompt User.
- 5** Specify how the user should select values by clicking the appropriate option.
Users can select values from a drop-down list, or browse through choices and enter them into a text box.

NOTE: A maximum of 1000 values are permitted if selected from a drop-down list.

- 6 To allow the user to select only one value for the column filter prompt, select the Single Value Only check box.

- 7 Under the What values should be shown to the user item, select one of these options:

- To show no values, click None.

The user will need to enter the value.

- To show all possible values, click All Values.

- To show a subset of values, click Filter Limited Values or SQL Results.

Filter Limited Values. Limiting values is useful when prompting for multiple columns, or when the results already contain a filter. It prevents a user from choosing values that would result in no data. For example, suppose a report contains a country column and a city column, and already contains the filter Country=France. By selecting limited values for the city column filter, the choices are constrained to cities in France only, which prevents the possibility of choosing mutually exclusive filters, such as Country=Italy and City=Paris. Limiting values might require more time to process the prompt compared to the two other options.

SQL Results. To limit the values to the results with an SQL statement, click the option SQL Results and type the SQL statement into the text box. When you use an SQL Results prompt, the following conditions apply:

- You cannot chain SQL Results prompts. For example, if you have two SQL Results prompts, the filtered values from one prompt do not affect the other prompt.
- If the first prompt is an SQL Results prompt and the second prompt is a normal prompt, then the result of the second prompt is limited to the results of the first prompt if the second prompt has the option, Filter Limited Values, selected. If the first prompt is a normal prompt and the second prompt is an SQL Results prompt, then the two prompts cannot be chained.
- Non-SQL Results prompts can always be chained regardless of the order of the prompts.
- The maximum number of values available for the prompt drop-down list is 1,000. If the SQL result returns more than 1,000 records, then only the first 1,000 records are displayed.

- 8 Make selections for the options in the Other options area:

- To allow the user to constrain the filter choices, select the Allow user to constrain choices check box. If this checkbox is selected, the users are presented with a picklist where they can use conditions (such as begins with, ends with, and contains) to constrain the choices.

Constrained choices help the user locate the values to use as a filter. For example, if a filter contains all the cities in France, a user can constrain the filter choices to those cities starting with P.

- To allow a user to skip this column filter, select the Allow user to skip prompt check box.

This causes a Skip Prompt option to appear. The user can then click this option to bypass making a selection for this filter.

- 9 When you are finished, click OK.

The column filter prompt is shown on the Define Prompts page.

- 10 To view the column filter prompt, click the Preview Analysis button.

To modify the properties of a column filter prompt

- 1 Click the properties button for the prompt.
- 2 In the Prompt Properties dialog box, make your changes, and then click OK.

To move a column filter prompt up or down in the execution order

- Click the up and down arrows until the prompts are in the order that you want.

The up and down arrows appear only when there is more than one prompt for the analysis.

To delete a column filter prompt

- Click the delete button for the prompt.

Adding Image Prompts

An image prompt provides an image that users click to select their report criteria. For example, from an image that shows products, users can click a product. The selected product is then used to filter the underlying report. To create an image prompt, you need to know how to use the HTML <map> tag to create an image map definition.

You define image prompts in the Define Prompts page in Oracle CRM On Demand Answers. When you have created multiple image prompts for a report, they are executed in the order in which they are listed; that is, from top to bottom.

To add or modify an image prompt

- 1 In Oracle CRM On Demand Answers, in the Define Prompts page, click Create Prompt, and select Image Prompt.
- 2 In the Image Map Prompt Properties dialog box, enter a caption for the image prompt in the Caption box.
The caption appears when a user runs the report. You can include HTML markup tags in the caption, such as , <center>, , and <table>.
- 3 Enter a description in the Description box (optional).
- 4 Enter the location and name of the image in the Image URL box.
If the image prompt is for your use only, you can specify a location that only you can access, such as c:\mycomputer\temp\map.gif. For an image prompt that will be available to other users, specify the Universal Naming Convention (UNC) name, such as \\ALLUSERS\graphics\map.gif, or a web site accessible to all your users, such as http://mycompany.com/imagemap.gif.
- 5 Enter the appropriate HTML <map> tags and data in the HTML box.

An HTML `<map>` statement with `<area>` elements is required. Each `<area>` element must specify `shape=` and `coords=` attributes. The `alt=` attribute, if specified, will be mapped to the Area title. For example:

```
<map>

  <area alt="Top-left" shape="rect" coords="0,0,50,50">

  <area alt="Top-right" shape="rect" coords="50,0,100,50">

  <area alt="Bottom" shape="rect" coords="0,50,100,100">

</map>
```

- 6 To extract the image map information from the HTML, click the link [Extract Image Map from HTML](#).

The Image Map Prompt Properties dialog box expands to show the area titles, shapes, and coordinates entered in the HTML box.

- You can change the values in the area title if you want. This text appears when a user moves the pointer over the image area.
- For each area, in the Column box, enter the name of the column to pass when a user clicks it, and the value to use.

NOTE: The column needs to be a fully qualified column name, in the format *Table.Column Name*.

- Place double quotes around any column names containing spaces. For example:
 - Account."Account Country"
 - "Units shipped"

- 7 When you are finished, click OK.

The image prompt is shown on the Define Prompts page.

- 8 To view the image prompt, click the Preview Analysis button.

When you click an area of the image, the underlying filter constructed for that area displays. You can click the Refresh link to see the results. You can change the filter criteria and then click the Refresh link again to see the change reflected in the results.

To modify the properties of an image prompt

- 1 Click the Properties button for the prompt.
- 2 In the Image Map Prompt Properties dialog box, make your changes, and then click OK.

NOTE: In Oracle CRM On Demand Answers, you do not see the prompts in the Define Criteria, Create Layout, Define Prompts, and Review pages. The prompts are displayed when you preview the analysis, and the prompts are displayed when users run the analysis.

Step 4: Reviewing Reports

When you finish creating or modifying a report, you can review it in the Review page in Oracle CRM On Demand Answers.

To review a report

- In Oracle CRM On Demand Answers, click Step 4 Review.

When you finish reviewing your report criteria, layout, and so on, you can click the Preview Analysis button to view the final version of the report in a separate window.

NOTE: You must click **Preview Analysis** to see any prompts that you defined in the report.

From the Review page, you also have the option to print or download the report.

Related Topics

See the following topics for related information:

- [Making Custom Reports Public](#) (on page 911)
- [Finishing Your Analysis](#) (on page 912)

Making Custom Reports Public

Before making a report available to all employees, verify its content and format by running a test and getting approval by the person who requested the report. The reviewer should check for the following:

- Report includes all necessary columns.
- Columns are sorted correctly.
- Filters are limiting the data correctly.
- Charts present the data in a useful way.

You can release the reports you created so that all employees at your company can use them. Those reports appear in the Shared Custom Analyses section on their Reports Homepage.

To make your report public

- 1 In Oracle CRM On Demand, click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click Design Analyses to open Oracle CRM On Demand Answers.
- 3 In Oracle CRM On Demand Answers, open the report.
- 4 Click Save.
- 5 Select the folder where you want to save the report.

- 6 Click OK to save the report.

Making a report public releases the report so that other employees at your company who have visibility to the folder, where you saved it, can access the report. Your private report in My Folders is still saved in case you want to run it or revise it for dynamic analysis later.

Finishing Your Analysis

When you finish defining the criteria, layout, and optional prompts for your analysis in Oracle CRM On Demand Answers, you save it.

To finish your analysis and save it

- 1 In Oracle CRM On Demand Answers, in the Define Criteria page, Create Layout page, Define Prompts page, or Review page, click the Finish button.

- 2 Select the folder where you want to save the report.

TIP: Save the report as a private one first using My Folders. After checking the setup, you can save it to public Shared Folders if you want to allow others to use it, and then delete it from My Folder. Reports saved in Shared Folders are accessed from the Shared Custom Analyses link within the Custom Reports and Analyses section on the Reports Homepage, and are visible to all employees who have access to the folder where you saved the report.

- 3 Enter a name for your report.

TIP: Use a consistent naming convention that all users will recognize. Also, avoid using extra blank spaces or symbols, such as apostrophes, when naming reports.

- 4 Enter a short description of the report, up to a maximum of 2,000 characters. The information you enter for both the name and description appears on the employees' Reports Homepage exactly as you enter it.

TIP: Use the description to let users know if the report contains historical or real-time data.

- 5 Click OK.

The report is saved, the Build and View Analysis window is closed, and the Getting Started With Answers page is displayed. Your custom report is stored in the folder that you specified. You can access it later in Oracle CRM On Demand Answers by clicking the Open Analysis button.

Using Functions in Analyses

SQL functions perform various calculations on column values. This section explains the syntax for the functions supported by Oracle CRM On Demand Answers. It also explains how to express literals. There are aggregate, string, math, calendar date/time, conversion, and system functions.

You can use functions anywhere that formulas or SQL expressions are allowed within Oracle CRM On Demand Answers. For example:

- **Column formulas.** For more information, see [Setting Up Column Formulas](#) (on page 854).

- **Filter formulas.** For more information, see [Adding Filters to Columns](#) (on page 835).
- **Bins.** For more information, see [Adding Filters to Columns](#) (on page 835).

Formula Names

When referring to a column in a function, you must use its internal formula name. All columns have two different names:

- The *display name* of the column is the name that you see displayed in the Active Subject Area section on the left side of the page, under a specific folder name. These names are used as the default labels for column headings. The names change depending on the language setting of the user, as well as any field name changes made by your company's Oracle CRM On Demand administrator.
- The *formula name* is a fixed, internal name for each column. These names are always in English. Formula names contain two parts that are separated by a period. The first part corresponds to the folder name, and the second part corresponds to the column. If there are any spaces in either the folder name or the column name, then that part must be enclosed in double quotes. The folder name part of the formula name is often the same as the displayed folder name, but not always.

The following table provides examples of formula names that correspond to specific folder and display names for a column.

Folder Name	Display Name	Formula Name
Account	Main Phone #	Account."Phone Number"
Account	Annual Revenues	Account."Annual Revenue"
Date Created	Fiscal Qtr/Yr	"Date Created"."Fiscal Quarter/Yr"
Owned By User	User ID	Employee."Employee ID"

Finding the Formula Name

To determine the formula name for a column, first add the column to a report. Click Edit Formula [fx], and then the Column Formula tab in the resulting dialog box. The formula name for that column can be found in the Column Formula text box.

TIP: When the cursor is in the Column Formula dialog box, clicking a column in the Action bar inserts the column's formula name directly into the text box at the cursor location (but the column is not added to the list of columns for the report). This shortcut works only for the Column Formula dialog box, not for other dialog boxes where SQL can be entered.

For more information, see the following topics:

- [Expressing Literals](#) (on page 914)
- [Aggregate Functions](#) (on page 915)
- [String Functions](#) (on page 925)
- [Math Functions](#) (on page 932)
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Expressing Literals

A literal is a nonnull value corresponding to a given data type. Literals are typically constant values; that is, they are values that are taken literally *as is*, without changing them at all. A literal value has to comply with the data type it represents.

This section describes how to express each type of literal in Oracle CRM On Demand Answers.

Character Literals

A character literal contains characters such as letters, numbers and symbols. To express a character literal, surround the character string with single quotes (`' '`). The length of the literal is determined by the number of characters between the single quotes.

Datetime Literals

The SQL 92 standard defines three kinds of typed datetime literals, in the following formats:

DATE 'yyyy-MM-dd'

TIME 'hh:MM:ss'

TIMESTAMP 'yyyy-MM-dd hh:mm:ss'

These formats are fixed. To express a typed datetime literal, use the keywords DATE, TIME, or TIMESTAMP followed by a datetime string enclosed in single quote marks. Two digits are required for all non-year components even if the value is a single digit.

Example:

```
CASE
    WHEN Opportunity."Close Date" >= TIMESTAMP '2006-01-01 00:00:00' THEN '2006'
    ELSE 'Pre-2006'
END
```

Numeric Literals

A numeric literal represents a value of a numeric data type. To express a numeric literal, simply include the number.

Do not surround numeric literals with single quotes; doing so expresses the literal as a character literal.

A number can be preceded with either a plus sign (+) or minus sign (-) to indicate a positive or negative number, respectively. Numbers can contain a decimal point and decimal numbers.

To express floating point numbers as literal constants, enter a number followed by the letter *E* (either uppercase or lowercase) and followed by the plus sign (+) or the minus sign (-) to indicate a positive or negative exponent. No spaces are allowed between the integer, the letter *E*, and the sign of the exponent.

Examples:

52

2.98

-326

12.5E6

Aggregate Functions

Aggregate functions perform work on multiple values to create summary results. The aggregate functions cannot be used to form a nested aggregation in expressions on columns that have a default aggregation rule predefined by Oracle CRM On Demand Answers.

Avg

Calculates the average (mean) value of an expression in a result set. Has to take a numeric expression as its argument.

Syntax:

AVG (*n_expression*)

where:

n_expression Any expression that evaluates to a numerical value.

AvgDistinct

Calculates the average (mean) of all distinct values of an expression. Has to take a numeric expression as its argument.

Syntax:

AVG (DISTINCT *n_expression*)

where:

n_expression Any expression that evaluates to a numerical value.

BottomN

Ranks the lowest *n* values of the expression argument from 1 to *n*, 1 corresponding to the lowest numerical value. The BOTTOMN function operates on the values returned in the result set.

Syntax:

`BOTTOMN (n_expression, n)`

where:

n_expression Any expression that evaluates to a numerical value.

n Any positive integer. Represents the bottom number of rankings displayed in the result set, 1 being the lowest rank.

NOTE: A query can contain only one `BOTTOMN` expression.

Count

Calculates the number of rows having a nonnull value for the expression. The expression is typically a column name, in which case the number of rows with nonnull values for that column is returned.

Syntax:

`COUNT (expression)`

where:

expression Any expression.

CountDistinct

Adds distinct processing to the `COUNT` function.

Syntax:

`COUNT (DISTINCT expression)`

where:

expression Any expression.

Count (*) (CountStar)

Counts the number of rows.

Syntax:

`COUNT(*)`

For example, if a table named `Facts` contained 200,000,000 rows, the following query would return the following results:


```
SELECT COUNT(*) FROM Facts  
  
COUNT(*)  
  
200000000
```

Mavg

Calculates a moving average (mean) for the last n rows of data, inclusive of the current row.

The average for the first row is equal to the numeric expression for the first row, the average for the second row is calculated by taking the average of the first two rows of data, the average for the third row is calculated by taking the average of the first three rows of data, and so on. When the nth row is reached, the average is calculated based on the last n rows of data.

Syntax:

```
MAVG (numExpr, integer)
```

where:

<i>numExpr</i>	Any expression that evaluates to a numerical value.
<i>integer</i>	Any positive integer. Represents the average of the last n rows of data.

Max

Calculates the maximum value (highest numeric value) of the rows satisfying the numeric expression argument.

Syntax:

```
MAX (expression)
```

where:

<i>expression</i>	Any expression.
-------------------	-----------------

Median

Calculates the median (middle) value of the rows satisfying the numeric expression argument. When there are an even number of rows, the median is the mean of the two middle rows. This function always returns a double.

Syntax:

```
MEDIAN (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Min

Calculates the minimum value (lowest numeric value) of the rows satisfying the numeric expression argument.

Syntax:

MIN (*expression*)

where:

expression Any expression.

NTile

The NTILE function determines the rank of a value in terms of a user-specified range. It returns integers to represent any range of ranks. In other words, the resulting sorted data set is broken into a number of tiles where there are roughly an equal number of values in each tile.

Syntax:

NTILE (*n_expression*, *n*)

where:

n_expression Any expression that evaluates to a numerical value.

n A positive, nonnull integer that represents the number of tiles.

If the *n_expression* argument is not NULL, the function returns an integer that represents a rank within the reported range.

NTile with *n*=100 returns what is commonly called the *percentile* (with numbers ranging from 1 to 100, with 100 representing the high end of the sort). This value is different from the results of the Oracle BI Server percentile function, which conforms to what is called *percent rank* in SQL 92 and returns values from 0 to 1.

Percentile

Calculates a percent rank for each value satisfying the numeric expression argument. The percent rank ranges are from 0 (1st percentile) to 1 (100th percentile), inclusive.

The PERCENTILE function calculates the percentile based on the values in the result set of the query.

Syntax:

PERCENTILE (*n_expression*)

where:

n_expression Any expression that evaluates to a numerical value.

Rank

Calculates the rank for each value satisfying the numeric expression argument. The highest number is assigned a rank of 1, and each successive rank is assigned the next consecutive integer (2, 3, 4,...). If certain values are equal, they are assigned the same rank (for example, 1, 1, 1, 4, 5, 5, 7...).

The RANK function calculates the rank based on the values in the result set of the query.

Syntax:

```
RANK (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

StdDev

The STDDEV function returns the standard deviation for a set of values. The return type is always a double.

Syntax:

```
STDDEV([ALL | DISTINCT] n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

- If ALL is specified, the standard deviation is calculated for all data in the set.
- If DISTINCT is specified, all duplicates are ignored in the calculation.
- If nothing is specified (the default), all data is considered.

There are two other functions that are related to STDDEV:

```
STDDEV_POP([ALL | DISTINCT] n_expression)
```

```
STDDEV_SAMP([ALL | DISTINCT] n_expression)
```

STDDEV and STDDEV_SAMP are synonyms.

StdDev_Pop

Returns the standard deviation for a set of values using the computational formula for population variance and standard deviation.

Syntax:

```
StdDev_Pop([ALL | DISTINCT] numExpr)
```

where:

numExpr Any expression that evaluates to a numerical value.

- If ALL is specified, the standard deviation is calculated for all data in the set.

- If DISTINCT is specified, all duplicates are ignored in the calculation.

Sum

Calculates the sum obtained by adding up all values satisfying the numeric expression argument.

Syntax:

```
SUM (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

SumDistinct

Calculates the sum obtained by adding all of the distinct values satisfying the numeric expression argument.

Syntax:

```
SUM(DISTINCT n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

TopN

Ranks the highest n values of the expression argument from 1 to n, 1 corresponding to the highest numerical value.

The TOPN function operates on the values returned in the result set.

Syntax:

```
TOPN (n_expression, n)
```

where:

n_expression Any expression that evaluates to a numerical value.

n Any positive integer. Represents the top number of rankings displayed in the result set, 1 being the highest rank.

A query can contain only one TOPN expression.

Running Aggregate Functions

Running aggregate functions are similar to functional aggregates in that they take a set of records as input, but instead of outputting the single aggregate for the entire set of records, they output the aggregate based on records encountered so far.

This section describes the running aggregate functions supported by the Oracle BI Server.

MAVG

Calculates a moving average (mean) for the last *n* rows of data in the result set, inclusive of the current row.

Syntax:

```
MAVG (n_expression, n)
```

where:

n_expression Any expression that evaluates to a numerical value.

n Any positive integer. Represents the average of the last *n* rows of data.

The average for the first row is equal to the numeric expression for the first row. The average for the second row is calculated by taking the average of the first two rows of data. The average for the third row is calculated by taking the average of the first three rows of data, and so on until you reach the *n*th row, where the average is calculated based on the last *n* rows of data.

MSUM

This function calculates a moving sum for the last *n* rows of data, inclusive of the current row.

The sum for the first row is equal to the numeric expression for the first row. The sum for the second row is calculated by taking the sum of the first two rows of data. The sum for the third row is calculated by taking the sum of the first three rows of data, and so on. When the *n*th row is reached, the sum is calculated based on the last *n* rows of data.

Syntax:

```
MSUM (n_expression, n)
```

Where:

n_expression Any expression that evaluates to a numerical value.

n Any positive integer. Represents the sum of the last *n* rows of data.

Example:

The following example shows a report that uses the MSUM function.

MONTH	REVENUE	3_MO_SUM
JAN	100.00	100.00

Reports

FEB	200.00	300.00
MAR	100.00	400.00
APRIL	100.00	400.00
MAY	300.00	500.00
JUNE	400.00	800.00
JULY	500.00	1200.00
AUG	500.00	1400.00
SEPT	500.00	1500.00
OCT	300.00	1300.00
NOV	200.00	1000.00
DEC	100.00	600.00

RSUM

This function calculates a running sum based on records encountered so far. The sum for the first row is equal to the numeric expression for the first row. The sum for the second row is calculated by taking the sum of the first two rows of data. The sum for the third row is calculated by taking the sum of the first three rows of data, and so on.

Syntax:

RSUM (n_expression)

Where:

n_expression Any expression that evaluates to a numerical value.

Example:

The following example shows a report that uses the RSUM function.

MONTH	REVENUE	RUNNING_SUM
JAN	100.00	100.00
FEB	200.00	300.00
MAR	100.00	400.00
APRIL	100.00	500.00
MAY	300.00	800.00
JUNE	400.00	1200.00
JULY	500.00	1700.00
AUG	500.00	2200.00

SEPT	500.00	2700.00
OCT	300.00	3000.00
NOV	200.00	3200.00
DEC	100.00	3300.00

RCOUNT

This function takes a set of records as input and counts the number of records encountered so far. It resets its value for each group in the query. If a sort order is defined on any column, then this function does not get incremented for adjoining identical values for the sorted column. To avoid this issue, reports should either not contain a sort order on any column or contain sort orders on all columns.

Syntax:

RCOUNT (Expr)

Where:

Expr An expression of any data type.

Example:

The following example shows a report that uses the RCOUNT function.

MONTH	PROFIT	RCOUNT
MAY	300.00	2
JUNE	400.00	3
JULY	500.00	4
AUG	500.00	5
SEPT	500.00	6
OCT	300.00	7

RMAX

This function takes a set of records as input and shows the maximum value based on records encountered so far. The specified data type must be one that can be ordered.

Syntax:

RMAX (expression)

Where:

expression An expression of any data type. The data type must be one that has an associated sort order.

Reports

Example:

The following example shows a report that uses the RMAX function.

MONTH	PROFIT	RMAX
JAN	100.00	100.00
FEB	200.00	200.00
MAR	100.00	200.00
APRIL	100.00	200.00
MAY	300.00	300.00
JUNE	400.00	400.00
JULY	500.00	500.00
AUG	500.00	500.00
SEPT	500.00	500.00
OCT	300.00	500.00
NOV	200.00	500.00
DEC	100.00	500.00

RMIN

This function takes a set of records as input and shows the minimum value based on records encountered so far. The specified data type must be one that can be ordered.

Syntax:

RMIN (expression)

Where:

expression An expression of any data type. The data type must be one that has an associated sort order.

Example:

The following example shows a report that uses the RMIN function.

MONTH	PROFIT	RMIN
JAN	400.00	400.00
FEB	200.00	200.00
MAR	100.00	100.00

APRIL	100.00	100.00
MAY	300.00	100.00
JUNE	400.00	100.00
JULY	500.00	100.00
AUG	500.00	100.00
SEPT	500.00	100.00
OCT	300.00	100.00
NOV	200.00	100.00
DEC	100.00	100.00

String Functions

String functions perform various character manipulations, and they operate on character strings.

ASCII

Converts a single character string to its corresponding ASCII code, between 0 and 255.

Syntax:

`ASCII (character_expression)`

where:

character_expression Any expression that evaluates to an ASCII character.

If the character expression evaluates to more than one character, the ASCII code corresponding to the first character in the expression is returned.

BIT_LENGTH

Returns the length, in bits, of a specified string. Each Unicode character is 2 bytes in length, which is equal to 16 bits.

Syntax:

`BIT_LENGTH (character_expression)`

where:

character_expression Any expression that evaluates to character string.

CHAR

Converts a numerical value between 0 and 255 to the character value corresponding to the ASCII code.

Syntax:

`CHAR (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value between 0 and 255.

CHAR_LENGTH

Returns the length, in number of characters, of a specified string. Leading and trailing blanks are not counted in the length of the string.

Syntax:

`CHAR_LENGTH (character_expression)`

where:

character_expression Any expression that evaluates to a numerical value between 0 and 255.

CONCAT

There are two forms of this function. The first form concatenates two character strings. The second form uses the character string concatenation character to concatenate more than two character strings.

Form 1 Syntax:

`CONCAT (character_expression1, character_expression2)`

where:

character_expression Expressions that evaluate to character strings.

Form 2 Syntax:

`string_expression1 || string_expression2 || ... string_expressionxx`

where:

string_expression Expressions that evaluate to character strings, separated by the character string concatenation operator `||` (double vertical bars). The first string is concatenated with the second string to produce an intermediate string, which is then concatenated with the next string, and so on.

Example:

```
Account."Account Name" || '-' || Account."Account Location"
```

Results look like:

```
Action Rentals - Headquarters
```

INSERT

Inserts a specified character string into a specified location in another character string, replacing a specified number of characters in the target string.

Syntax:

```
INSERT (character_expression1, n, m, character_expression2)
```

where:

<i>character_expression1</i>	Any expression that evaluates to a character string. This is the string receiving the insertion.
<i>character_expression2</i>	Any expression that evaluates to a character string. This is the string to insert.
<i>n</i>	Any positive integer representing the number of characters from the start of the first string where a portion of the second string is inserted.
<i>m</i>	Any positive integer representing the number of characters in the first string to be replaced by the entirety of the second string.

LEFT

Returns a specified number of characters from the left of a string.

Syntax:

```
LEFT (character_expression, n)
```

where:

<i>character_expression</i>	Any expression that evaluates to a character string.
<i>n</i>	Any positive integer representing the number of characters from the left of the string that are returned.

LENGTH

Returns the length, in number of characters, of a specified string. The length is returned excluding any trailing blank characters.

Syntax:

```
LENGTH (character_expression)
```

where:

character_expression Any expression that evaluates to a character string.

LOCATE

Returns the numerical position of one string within another string. If the string is not found, the LOCATE function returns a value of 0. If you want to specify a starting position to begin the search, use the LOCATEN function instead.

Syntax:

```
LOCATE (character_expression1, character_expression2)
```

where:

character_expression1 Any expression that evaluates to a character string. This is the expression to search for in the character expression.

character_expression2 Any expression that evaluates to a character string. This is the expression to be searched.

LOCATEN

Returns the numerical position of one string within another string. This is identical to the LOCATE function, except that the search begins at the position specified by an integer argument. If the string is not found, the LOCATEN function returns a value of 0. The numerical position to return is determined by counting the first character in the string as occupying position 1, regardless of the value of the integer argument.

Syntax:

```
LOCATEN (character_expression1, character_expression2, n)
```

where:

character_expression1 Any expression that evaluates to a character string. This is the string to search for.

<i>character_expression2</i>	Any expression that evaluates to a character string. This is the string to be searched.
<i>n</i>	Any positive, nonzero integer that represents the starting position to begin to look for the locate expression.

LOWER

Converts a character string to lower case.

Syntax:

```
LOWER (character_expression)
```

where:

character_expression Any expression that evaluates to a character string.

OCTET_LENGTH

Returns the bits, in base 8 units (number of bytes), of a specified string.

Syntax:

```
OCTET_LENGTH (character_expression)
```

where:

character_expression Any expression that evaluates to a character string.

POSITION

Returns the numerical position of one string within another string. If the string is not found, the function returns 0.

Syntax:

```
POSITION (character_expression1 IN character_expression2)
```

where:

character_expression1 Any expression that evaluates to a character string. This is the string to search for.

character_expression2 Any expression that evaluates to a character string. This is the string in which to search.

REPEAT

Repeats a specified expression *n* times, where *n* is a positive integer.

Syntax:

```
REPEAT (character_expression, n)
```

REPLACE

Replaces specified characters in a string with other specified characters.

Syntax:

```
REPLACE (character_expression, change_expression, replace_with_expression)
```

where:

<i>character_expression</i>	Any expression that evaluates to a character string. This string will have its characters replaced.
<i>change_expression</i>	Any expression that evaluates to a character string. Specifies the characters in the first string that will be replaced.
<i>replace_with_expression</i>	Any expression that evaluates to a character string. Specifies the replacement characters to substitute into the first string.

RIGHT

Returns a specified number of characters from the right of a string.

Syntax:

```
RIGHT (character_expression, n)
```

where:

<i>character_expression</i>	Any expression that evaluates to a character string.
<i>n</i>	Any positive integer representing the number of characters from the right of the first string that are returned.

SPACE

Inserts blank spaces.

Syntax:

```
SPACE (integer)
```

where:

integer Any expression that evaluates to a character string.

SUBSTRING

Creates a new string starting from a fixed number of characters into the original string.

Syntax:

```
SUBSTRING (character_expression FROM starting_position)
```

where:

character_expression Any expression that evaluates to a character string.

starting_position A positive integer that indicates the starting position within the first character string.

Example:

```
SUBSTRING ('ABCDEF' FROM 3)
```

Results in:

```
CDEF
```

TRIM

Strips specified leading and/or trailing characters from a character string.

Syntax:

```
TRIM (type 'character' FROM character_expression)
```

where:

type LEADING Strips specified leading characters from a character string.

TRAILING Strips specified trailing characters from a character string.

Strips specified characters, both leading and trailing, from a character

BOTH string.

character Any single character. If the character part of the specification and the single quotes are omitted, a space character is used as a default.

character_expression Any expression that evaluates to a character string.

NOTE: The syntax `TRIM (character_expression)` is also valid. This trims all leading and trailing spaces.

UPPER

Converts a character string to uppercase.

Syntax:

`UPPER (character_expression)`

where:

character_expression Any expression that evaluates to a character string.

Math Functions

The math functions perform mathematical operations.

Abs

Calculates the absolute value of a numerical expression.

Syntax:

`ABS (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value.

Acos

Calculates the arc cosine of a numerical expression.

Syntax:

`ACOS (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value.

Asin

Calculates the arc sine of a numerical expression.

Syntax:

```
ASIN (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Atan

Calculates the arc tangent of a numerical expression.

Syntax:

```
ATAN (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Atan2

Calculates the arc tangent of y/x , where y is the first numerical expression and x is the second numerical expression.

Syntax:

```
ATAN2 (n_expression1, n_expression2)
```

where:

n_expression (1 and 2) Any expression that evaluates to a numerical value.

Ceiling

Rounds a noninteger numerical expression to the next highest integer. If the numerical expression evaluates to an integer, the Ceiling function returns that integer.

Syntax:

```
CEILING (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Cos

Calculates the cosine of a numerical expression.

Syntax:

`COS (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value.

Cot

Calculates the cotangent of a numerical expression.

Syntax:

`COT (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value.

Degrees

Converts an expression from radians to degrees.

Syntax:

`DEGREES (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value.

Exp

Calculates the value e to the power specified.

Syntax:

`EXP (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value.

Floor

Rounds a noninteger numerical expression to the next lowest integer. If the numerical expression evaluates to an integer, the FLOOR function returns that integer.

Syntax:

```
FLOOR (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Log

Calculates the natural logarithm of an expression.

Syntax:

```
LOG (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Log10

Calculates the base 10 logarithm of an expression.

Syntax:

```
LOG10 (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Mod

Divides the first numerical expression by the second numerical expression and returns the remainder portion of the quotient.

Syntax:

```
MOD (n_expression1, n_expression2)
```

where:

n_expression (1 and 2) Any expression that evaluates to a numerical value.

Pi

Returns the constant value of pi (the circumference of a circle divided by the diameter of a circle).

Syntax:

PI()

Power

Takes the first numerical expression and raises it to the power specified in the second numerical expression.

Syntax:

POWER(*n_expression1*, *n_expression2*)

where:

n_expression (1 and 2) Any expression that evaluates to a numerical value.

Radians

Converts an expression from degrees to radians.

Syntax:

RADIANS (*n_expression*)

where:

n_expression Any expression that evaluates to a numerical value.

Rand

Returns a pseudo-random number between 0 and 1.

Syntax:

RAND()

RandFromSeed

Returns a pseudo-random number based on a seed value. For a given seed value, the same set of random numbers are generated.

Syntax:

```
RAND (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Round

Rounds a numerical expression to n digits of precision.

Syntax:

```
ROUND (n_expression, n)
```

where:

n_expression Any expression that evaluates to a numerical value.

n Any positive integer representing the number of digits of precision (that is, the number of decimal places) to which to round.

Example:

```
ROUND (12.358,2)
```

Returns:

```
12.36
```

Sign

Returns a value of 1 if the numerical expression argument evaluates to a positive number, a value of -1 if the numerical expression argument evaluates to a negative number, and 0 if the numerical expression argument evaluates to zero.

Syntax:

```
SIGN (n_expression)
```

where:

n_expression Any expression that evaluates to a numerical value.

Sin

Calculates the sine of a numerical expression.

Syntax:

`SIN (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value.

Sqrt

Calculates the square root of the numerical expression argument. The numerical expression has to evaluate to a nonnegative number.

Syntax:

`SQRT (n_expression)`

where:

n_expression Any expression that evaluates to a nonnegative numerical value.

Tan

Calculates the tangent of a numerical expression.

Syntax:

`TAN (n_expression)`

where:

n_expression Any expression that evaluates to a numerical value.

Truncate

Truncates a decimal number to return a specified number of decimal places.

Syntax:

`TRUNCATE (n_expression, n)`

where:

n_expression Any expression that evaluates to a numerical value.

n Any positive integer representing the number of decimal places that are returned.

Example:

```
TRUNCATE (12.358,2)
```

Returns:

```
12.35
```

Calendar Date/Time Functions

The calendar date/time functions manipulate data in data types for date, time and timestamp. (The timestamp data type is a combination of date and time.)

All date-functions are ISO 8601 compliant. This particularly affects functions such as `Week_Of_Year` and `Week_Of_Quarter` where the initial week of the year is the first full week that includes a Thursday. For detailed information on how date functions are calculated, consult the ISO 8601 standard.

Current_Date

Returns the current date. The date is determined by the system in which Oracle CRM On Demand Answers is running. The value does not contain a time component.

Syntax:

```
CURRENT_DATE
```

Current_Time

Returns the current time. The time is determined by the system in which Oracle CRM On Demand Answers is running. The value does not contain a date component.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

```
CURRENT_TIME (n)
```

where:

- n* Any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

Current_TimeStamp

Returns the current date/timestamp. The timestamp is determined by the system in which Oracle CRM On Demand Answers is running.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

`CURRENT_TIMESTAMP (n)`

where:

n Any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

Day_Of_Quarter

Returns a number (between 1 and 92) corresponding to the day of the quarter for the specified date.

Syntax:

`DAY_OF_QUARTER (date_expression)`

where:

date_expression Any expression that evaluates to a date.

DayName

Returns the name of the day of the week (in English) for a specified date.

Syntax:

`DAYNAME (date_expression)`

where:

date_expression Any expression that evaluates to a date.

DayOfMonth

Returns the number corresponding to the day of the month for a specified date.

Syntax:

`DAYOFMONTH (date_expression)`

where:

date_expression Any expression that evaluates to a date.

DayOfWeek

Returns a number between 1 and 7, corresponding to the day of the week, for a specified date. The number 1 corresponds to Sunday, and the number 7 corresponds to Saturday.

Syntax:

DAYOFWEEK (date_expression)

where:

date_expression Any expression that evaluates to a date.

DayOfYear

Returns the number (between 1 and 366) corresponding to the day of the year for a specified date.

Syntax:

DAYOFYEAR (date_expression)

where:

date_expression Any expression that evaluates to a date.

Hour

Returns a number (between 0 and 23) corresponding to the hour for a specified time. For example, 0 corresponds to 12 a.m. and 23 corresponds to 11 p.m.

Syntax:

HOUR (time_expression)

where:

time_expression Any expression that evaluates to a time.

Minute

Returns a number (between 0 and 59) corresponding to the minute for a specified time.

Syntax:

MINUTE (time_expression)

where:

time_expression Any expression that evaluates to a time.

Month

Returns the number (between 1 and 12) corresponding to the month for a specified date.

Syntax:

```
MONTH (date_expression)
```

where:

date_expression Any expression that evaluates to a date.

Month_Of_Quarter

Returns the number (between 1 and 3) corresponding to the month in the quarter for a specified date.

Syntax:

```
MONTH_OF_QUARTER (date_expression)
```

where:

date_expression Any expression that evaluates to a date.

MonthName

Returns the name of the month (in English) for a specified date.

Syntax:

```
MONTHNAME (date_expression)
```

where:

date_expression Any expression that evaluates to a date.

Now

Returns the current timestamp. The NOW function is equivalent to the CURRENT_TIMESTAMP function.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

```
NOW ()
```

Quarter_Of_Year

Returns the number (between 1 and 4) corresponding to the quarter of the year for a specified date.

Syntax:

```
QUARTER_OF_YEAR (date_expression)
```

where:

date_expression Any expression that evaluates to a date.

Second

Returns the number (between 0 and 59) corresponding to the seconds for a specified time.

Syntax:

```
SECOND (time_expression)
```

where:

time_expression Any expression that evaluates to a time.

TimestampAdd

The TimestampAdd function adds a specified number of intervals to a specified timestamp. A single timestamp is returned.

Syntax:

```
TimestampAdd (interval, integer_expression, timestamp_expression)
```

where:

interval The specified interval. Valid values are:

SQL_TSI_SECOND

SQL_TSI_MINUTE

SQL_TSI_HOUR

SQL_TSI_DAY

SQL_TSI_WEEK

SQL_TSI_MONTH

SQL_TSI_QUARTER

SQL_TSI_YEAR

integer_expression Any expression that evaluates to an integer. This is

the number of intervals to add.

timestamp_expression The timestamp used as the base in the calculation.

A null integer-expression or a null timestamp-expression passed to this function will result in a null return value.

In the simplest scenario, this function merely adds the specified integer value (*integer_expression*) to the appropriate component of the timestamp, based on the interval. Adding a week translates to adding seven days, and adding a quarter translates to adding three months. A negative integer value results in a subtraction (going back in time).

An overflow of the specified component (such as more than 60 seconds, 24 hours, twelve months, and so on) necessitates adding an appropriate amount to the next component. For example, when adding to the day component of a timestamp, this function considers overflow and takes into account the number of days in a particular month (including leap years when February has 29 days).

When adding to the month component of a timestamp, this function verifies that the resulting timestamp has a sufficient number of days for the day component. For example, adding 1 month to 2000-05-31 does not result in 2000-06-31 because June does not have 31 days. This function reduces the day component to the last day of the month, 2000-06-30 in this example.

A similar issue arises when adding to the year component of a timestamp having a month component of February and a day component of 29 (that is, last day of February in a leap year). If the resulting timestamp does not fall on a leap year, the function reduces the day component to 28.

The following are examples of the `TimestampAdd` function:

The following code example asks for the resulting timestamp when 3 days are added to 2000-02-27 14:30:00. Because February, 2000 is a leap year, this returns a single timestamp of 2000-03-01 14:30:00.

```
TimestampAdd(SQL_TSI_DAY, 3, TIMESTAMP'2000-02-27 14:30:00')
```

The following code example asks for the resulting timestamp when 7 months are added to 1999-07-31 0:0:0. This returns a single timestamp of 2000-02-29 00:00:00. Notice the reduction of day component to 29 because of the shorter month of February.

```
TimestampAdd(SQL_TSI_MONTH, 7, TIMESTAMP'1999-07-31 00:00:00')
```

The following code example asks for the resulting timestamp when 25 minutes are added to 2000-07-31 23:35:00. This returns a single timestamp of 2000-08-01 00:00:00. Notice the propagation of overflow through the month component.

```
TimestampAdd(SQL_TSI_MINUTE, 25, TIMESTAMP'2000-07-31 23:35:00')
```

TimeStampDiff

The `TimeStampDiff` function returns the total number of specified intervals between two timestamps.

Syntax:

```
TimeStampDiff (interval, timestamp_expression1, timestamp_expression2)
```

where:

<i>interval</i>	The specified interval. Valid values are: SQL_TSI_SECOND SQL_TSI_MINUTE SQL_TSI_HOUR SQL_TSI_DAY SQL_TSI_WEEK SQL_TSI_MONTH SQL_TSI_QUARTER SQL_TSI_YEAR
<i>timestamp_expression1</i>	The timestamp to subtract from the second timestamp.
<i>timestamp_expression2</i>	The second timestamp. <i>timestamp_expression1</i> is subtracted from this timestamp to determine the difference.

A null timestamp-expression parameter passed to this function will result in a null return value.

This function first determines the timestamp component that corresponds to the specified interval parameter. For example, SQL_TSI_DAY corresponds to the day component and SQL_TSI_MONTH corresponds to the month component.

The function then looks at the higher order components of both timestamps to calculate the total number of intervals for each timestamp. For example, if the specified interval corresponds to the month component, the function calculates the total number of months for each timestamp by adding the month component and twelve times the year component.

Finally, the function subtracts the first timestamp's total number of intervals from the second timestamp's total number of intervals.

The TimestampDiff function rounds up to the next integer whenever fractional intervals represent a crossing of an interval boundary. For example, the difference in years between 1999-12-31 and 2000-01-01 is one year because the fractional year represents a crossing from one year to the next (that is, 1999 to 2000). By contrast, the difference between 1999-01-01 and 1999-12-31 is zero years because the fractional interval falls entirely within a particular year (that is, 1999).

When calculating the difference in weeks, the function calculates the difference in days and divides by seven before rounding.

When calculating the difference in quarters, the function calculates the difference in months and divides by three before rounding.

TimestampDiff Function and Results Example

The following code example asks for a difference in days between timestamps 1998-07-31 23:35:00 and 2000-04-01 14:24:00. It returns a value of 610. Notice that the leap year in 2000 results in an additional day.

```
TimestampDiff(SQL_TSI_DAY, TIMESTAMP'1998-07-31 23:35:00', TIMESTAMP'2000-04-01 14:24:00')
```

Week_Of_Quarter

Returns a number (between 1 and 13) corresponding to the week of the quarter for the specified date.

Syntax:

```
WEEK_OF_QUARTER (date_expression)
```

where:

date_expression Any expression that evaluates to a date.

Week_Of_Year

Returns a number (between 1 and 53) corresponding to the week of the year for the specified date.

Syntax:

```
WEEK_OF_YEAR (date_expression)
```

where:

date_expression Any expression that evaluates to a date.

Year

Returns the year for the specified date.

Syntax:

```
YEAR (date_expression)
```

where:

date_expression Any expression that evaluates to a date.

Example:

```
YEAR (CURRENT_DATE)
```

Conversion Functions

The conversion functions convert a value from one form to another.

Cast

Changes the data type of either a value or a null value to another data type. This change is required before using values of one data type in a function or operation that expects another data type.

Syntax:

```
CAST (expression|NULL AS datatype)
```

The supported data types to which the value can be changed are the following:

```
CHARACTER, VARCHAR, INTEGER, FLOAT, SMALLINT, DOUBLE PRECISION, DATE, TIME, TIMESTAMP, BIT,  
BIT VARYING
```

Depending on the source data type, some destination types are not supported. For example, if the source data type is a BIT string, the destination data type has to be a character string or another BIT string.

Example:

The following first changes (CASTs) Annual Revenues to an INTEGER to remove the decimal places, and then to a CHARACTER so that it can be concatenated with a character literal (the text 'K'):

```
CAST ( CAST ( Account."Account Revenue"/1000 AS INTEGER ) AS CHARACTER ) || ' K'
```

IfNull

Tests if an expression evaluates to a null value, and if it does, assigns the specified value to the expression.

Syntax:

```
IFNULL (expression, value)
```

ValueOf()

Use the VALUEOF function in an expression builder or filter to reference the value of a session variable defined in Oracle CRM On Demand Answers. For more information, see [Session Variables](#) (on page 951).

Session variables should be used as arguments of the VALUEOF function. Refer to session variables by name.

Example:

To use the value of a session variable named NQ_SESSION.CURRENT_YEAR:

```
CASE WHEN "Year" > VALUEOF(NQ_SESSION.CURRENT_YEAR) THEN 'Future' WHEN ... ELSE...END
```

You must refer to a session variable by its fully qualified name.

System Functions

The system functions return values relating to the session.

User

Returns the current Oracle CRM On Demand user's User ID. This ID is unique to each user.

Syntax:

```
USER ( )
```

Operators

Operators are used to combine expression elements to make certain types of comparisons in an expression.

Operator	Function in an Expression
+	Plus sign for addition.
-	Minus sign for subtraction
*	Multiply sign for multiplication
/	Divide by sign for division
	Character string concatenation
(Open parenthesis, for grouping operations
)	Close parenthesis, for grouping operations
>	Greater than sign, indicating values higher than the comparison
<	Less than sign, indicating values lower than the comparison
=	Equal sign, indicating the same value
<=	Less than or equal to sign, indicating values the same or lower than the comparison
>=	Greater than or equal to sign, indicating values the same or higher than the comparison
<>	Not equal to, indicating values higher or lower, but not the same
AND	AND connective, indicating intersection with one or more conditions to form a compound condition
OR	OR connective, indicating the union with one or more conditions to form a compound condition
NOT	NOT connective, indicating a condition is not met
,	Comma, used to separate elements in a list

Case Statements

Case statements are building blocks for creating conditional expressions that can produce different results for different column values.

Case (Switch)

This form of the Case statement is also referred to as the CASE (Lookup) form. The value of expression1 is examined, then the WHEN expressions. If expression1 matches any WHEN expression, it assigns the value in the corresponding THEN expression.

If expression1 matches an expression in more than one WHEN clause, only the expression following the first match is assigned.

If none of the WHEN expressions match, it assigns the value specified in the ELSE expression. If no ELSE expression is specified, it assigns the value NULL.

Refer also to the Case (If) statement.

Syntax:

```
CASE expression1
  WHEN expression THEN expression
  {WHEN expression... THEN expression...}
  ELSE expression
END
```

Where:

CASE

Starts the CASE statement. Must be followed by an expression and one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword.

WHEN

Specifies the condition to be satisfied.

THEN

Specifies the value to assign if the corresponding WHEN expression is satisfied.

ELSE

Specifies the value to assign if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed.

END

Ends the CASE statement.

Example

```
CASE Score-par
  WHEN -5 THEN 'Birdie on Par 6'
  WHEN -4 THEN 'Must be Tiger'
  WHEN -3 THEN 'Three under par'
```

```
    WHEN -2 THEN 'Two under par'
    WHEN -1 THEN 'Birdie'
    WHEN 0 THEN 'Par'
    WHEN 1 THEN 'Bogey'
    WHEN 2 THEN 'Double Bogey'
    ELSE 'Triple Bogey or worse'

END
```

In the above example, the WHEN statements must reflect a strict equality; a WHEN condition of

```
    WHEN < 0 THEN 'Under Par'
```

is illegal because comparison operators are not allowed.

Case (If)

This form of the Case statement evaluates each WHEN condition and if satisfied, assigns the value in the corresponding THEN expression.

If none of the WHEN conditions are satisfied, it assigns the default value specified in the ELSE expression. If no ELSE expression is specified, it assigns the value NULL.

Refer also to the Case (Switch) statement.

Syntax:

```
CASE

    WHEN request_condition1 THEN expression1
    {WHEN request_condition2 THEN expression2}
    {WHEN request_condition... THEN expression...}
    ELSE expression

END
```

Where:

CASE

Starts the CASE statement. Must be followed by one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword.

WHEN

Specifies the condition to be satisfied.

THEN

The value to assign if the corresponding WHEN expression is satisfied.

ELSE

Specifies the value if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed.

END

Ends the CASE statement.

Example

```
CASE
    WHEN score-par < 0 THEN 'Under Par'
    WHEN score-par = 0 THEN 'Par'
    WHEN score-par = 1 THEN 'Bogie'
    WHEN score-par = 2 THEN 'Double Bogey'
    ELSE 'Triple Bogey or worse'
END
```

Unlike the Switch form of the CASE statement, the WHEN statements in the If form allow comparison operators; a WHEN condition of

```
WHEN < 0 THEN 'Under Par'
```

is legal.

Session Variables

Session variables hold predefined values for a user and are initialized when a user logs in to Oracle CRM On Demand. When session variables are initialized, they remain unchanged for the duration of the session. Session variables are private values for a user and each instance of a session variable can be initialized with a different value for different users. You can reference them in the following areas: Title views, Narrative views, Column Filters, Column Formulas, Dashboard Prompts, and so on.

The most common use of a session variable is to reference it in a column filter condition of a report where you want to dynamically limit the results. The limit is based on the value of a session variable, such as the current fiscal year and month.

A session variable is referenced using the syntax NQ_SESSION.{Variable Name}. To use it in a column formula, it is referenced using the syntax VALUEOF(NQ_SESSION.Variable Name).

CURRENT_DT	Current date and time.
COMPANY_LANG	Company's default language.
COMPANY_TIMEZONE	Company's default time zone.
COMPANY_TMPLT_COUNTRY	Company's default country.
CURRENT_MONTH	Current fiscal month of the session for the user. The values range from 1 to 12.
CURRENT_QTR	Current fiscal quarter of the session for the user. The values range from 1 to 4.

Reports

CURRENT_YEAR	Current fiscal year of the session for the user. A four-digit value, for example: 2011.
DISPLAYNAME	Current user's name.
LAST_QTR	Previous quarter.
LAST_QTR_YEAR	Year of the previous quarter.
LAST_YEAR	Previous year.
NEXT_QTR	Next quarter.
NEXT_QTR_YEAR	Year of the next quarter.
NEXT_YEAR	Next year.
QAGO	Last quarter.
QTR_BEFORE_LAST	Two quarters ago.
QTR_BEFORE_LAST_YEAR	Year of two quarters ago.
REPLUSER	Current user's login ID.
SERVER_COMPANY_TIMEZONE_OFFSET	The offset (in minutes) between the server timestamp and company default timestamp. The value of this variable is set when you log in. The variable is not updated during your session.
USER_ALIAS	Current user's alias.
USER_COMPANY_CURCY	Company's default currency.
USER_COMPANY_TIMEZONE_OFFSET	The offset (in minutes) between the user timestamp and company default timestamp. The value of this variable is set when you log in. The variable is not updated during your session.
USER_DEFAULT_CURCY	User's default currency.
USER_FISCAL_CALENDAR	First month of the current user's fiscal year.
USER_LANG	User's default language.
USER_SERVER_TIMEZONE_OFFSET	The offset (in minutes) between the user timestamp and server timestamp. The value of this variable is set when you log in. It is not updated during your session..
USER_TIMESTAMP	The timestamp of the user based on the timezone the setting defined in the user profile. The value of this variable is set when you log in. The variable is not updated during your session.

USER_TIMEZONE	The timezone description as defined in your user profile. The value of this variable is set when you log in. The variable is not updated during your session.
YAGO	Last year.
YEAR_MINUS_THREE	Three years ago.
YEAR_MINUS_TWO	Two years ago.
YEAR_PLUS_TWO	Two years from now.

About Report Performance

Report performance is a concern for companies with large volumes of data and users. The larger and more sophisticated your reporting needs become, the more important the report performance is to you. Understanding how Oracle CRM On Demand Answers efficiently compensates and processes data with caching and during different times helps you to build reports with the best performance possible.

This topic describes the in-built caching mechanism enabling fast response time as well as the expected performance during the nightly refresh and when using reporting subject areas instead of analytic subject areas. For more information about report performance, see [Optimizing Performance](#) (on page 954).

About Caching

When reports and queries are run using analytic subject areas, the query results are cached. The query cache allows Oracle CRM On Demand Answers to satisfy subsequent query requests faster without having to go back to the database. This reduction allows a faster, query-response time. In addition to a faster, query-response time, this feature conserves network resources and eliminates costly database processing. Queries do not have to be identical to take advantage of this query caching. Even a subset of a previously run query with a filter condition or the same query with less columns can use the cache generated by a previous query. Data visibility is fully respected with query caching. Because the database is updated during the incremental refresh, the query cache is purged and repopulated when a new set of queries are run subsequently.

Query caching is supported only for reports and queries using analytic subject areas. Real-time reports and queries are not enabled with query cache. However, both real-time and historical reports and queries use a Web server cache. The Web server cache is not the same as the query cache supported by Oracle CRM On Demand Answers. The Web server cache for real-time and historical queries exists for at least for 10 minutes after being created or used, but it is purged after 60 minutes. Some queries might be purged sooner than 60 minutes, depending on the number of requests being run.

Analytic (Historical) Reports Compared to Reporting (Real-Time) Reports

Queries run using analytic (historical) subject areas are comparatively faster than queries run using reporting (real-time) subject areas. The analytic subject areas use a specialized data warehouse that is designed and optimized exclusively for analysis and reporting. However, the real-time subject areas use the database that is optimized to support the transactional activities where a low volume of records are read, written, updated extremely fast. So, when real-time subject areas are used, queries have to compete for database resources

that also have to cater to the needs of transaction updates of Oracle CRM On Demand affecting the performance of both Oracle CRM On Demand and real-time queries. Due to the need to support the reporting of most current data, the real-time subject areas are not enabled with query caching, which further reduces query-performance problems even for identical queries.

Use real-time subject areas only when it is critical to get the most up-to-the-minute data, or when the historical subject areas do not meet your reporting needs.

Report Performance During the Nightly Refresh

Real-time report query performance is somewhat affected during the nightly refresh process, because the data that is being retrieved to satisfy the request is also being read by the nightly refresh process to populate the data warehouse that drives the historical subject areas. However, the performance of historical report queries is not affected during the nightly refresh process, because a snapshot of the data warehouse is taken at the start of the nightly refresh, and users are directed to that replicated copy. Upon completion of the nightly refresh, users are redirected to the refreshed data warehouse automatically. This feature is transparent to users.

Optimizing Performance

Every time you access a report or analysis, your data is retrieved from the database, processed by the reporting server and displayed on the page. The more complex the analysis, the more time it can take to query the database to retrieve and present the data. This topic contains guidelines to help you create reports that display as quickly as possible.

Before you begin. Do the following:

- Review the prebuilt reports available in Oracle CRM On Demand. These reports might address most of your reporting needs.
- Take training courses.
- Gather your reporting requirements and have them approved by the stakeholders.
- Check your browser settings to make sure the browser client is properly configured for performance.
- Understand report performance. For more information, see [About Report Performance](#) (on page 953).

About Subject Areas

You can use the two subject area types depending on your reporting and business needs.

The Analytics subject areas should be used whenever possible to build reports. These subject areas are built using a specially constructed data warehouse that is tuned for better query performance queries. The data warehouse used for Analytics subject areas is refreshed daily and reports built using these subject areas display results faster than Reporting subject areas even for large and complex queries.

The Reporting subject areas are built using the same database in which all other user transactions in the application occur, and hence, compete for same resources that your application depends on when data is retrieved for reports.

Guidelines for Using a Reporting Subject Area

If you are using a Reporting subject area, follow these guidelines:

- When possible, use fields from the Address (Extended) folders.
- When possible, minimize the use of the following:
 - Custom picklist fields.
 - Fields from any Owned By User folder. Instead, use the Owner field.
 - Fields from the Primary Contact folder within the Account folder.
 - CAST functions for Date or Date/Time fields.
 - Parent Account, Last Modified By, Created By, and Manager fields.
 - Fields from Date-type folders, such as Date Created and Date Closed folders.

Although these folders provide a convenient way to group the date attribute to week, month, quarter, or year, using them also makes the query more complex and affects the report performance. Instead, use Date or Date/Time fields from the primary record type folder, when possible. For example, open the Opportunity subject area, and select the Close Date field in the Opportunities folder instead of a field from the Close Date folder.

Guidelines for Improving Performance

Follow these guidelines to improve performance:

Build Reports Incrementally

Do the following:

- Start small, and test the report as you build it. Begin with a few fields, and test them before adding more columns.
- Test your filters to determine the best sequence to use.

Different sequences can increase or decrease performance, but only trial-and-error helps you determine this.

Minimize the Use of Record Types That Cross Fields or Columns

Follow these guidelines:

- **Columns.** When you select columns from more than one record type for your analysis, you are adding complexity to the data query. This complexity can affect the speed of displaying results. So, consider this when including cross-record type fields in a report.
- **Column Selectors.** Keep all column selectors within the same record type. Whenever possible, do not use a column selector that crosses to another record type.
- **Prompts.** Try to make all prompts reference fields within the same record type folder.

Use Indexed Fields

Do the following:

- Use indexed field to filter data in real-time reports.
Indexed fields are optimized so your report results appear more quickly.
- Plan ahead when you set up your data to make sure that the correct data is stored in the indexed fields.
Following this practice allows you to build reports that use the indexed fields, incorporating them at the best possible places. Oracle CRM On Demand also has a limited number of indexed custom fields. The number varies according to the field type and record type.

Limit the Organizational Hierarchy to Five Levels

The higher a user is in the organizational hierarchy, the more data is returned and the slower the report runs. Therefore, limit the hierarchy to a maximum of five levels.

Use Filters

Using filters restricts the amount of data that is returned when you access an analysis. Filtering can increase the speed of running your report.

- Apply filters as a first step to building a report. If your company has a lot of data do not run the first preview of a report until you first apply filters.
- Filter your driving record type as a priority. For example, when using an Activities subject area, filter Activities.
- Choose the most restrictive filters first, and then, after experimenting, ease restrictions as needed.

However, consider these guidelines when adding filters:

- If a filter references a column with an underlying CASE formula, this filter might adversely affect reporting performance, depending on the formula and the related processing required. When filtering a field with a CASE statement or other formula, experiment to determine how this filtering affects reporting performance.
- Before using a CASE formula, ask yourself these questions:
 - Can this classification be performed in Oracle CRM On Demand using the Workflow feature?
 - Does the classification code appear in other reports? If so, then consider creating a new column and building a workflow to populate it.
- A report that filters a custom Date field can run more quickly than a similar report that filters a custom Date and Time field, because all Date and Time fields involve converting time zones, which affects reporting performance. Therefore, when possible, filter custom Date fields rather than custom Date and Time fields.
- Avoid using an OR clause on different record types or columns (for example, where SR.Type = 'A' OR SR.Priority = 'High' OR Account.Industry = 'Medical'). Instead, try the following:
 - Remove the OR clause, and perform further classification in the pivot table.
 - Break the report in to multiple, smaller reports, and merge the result using the combined analytics.

Follow the Guidelines for Defining Prompts

You can define prompts for your report in Step 3 of the Build and View Analysis page in Oracle CRM On Demand. These prompts allow those users who access the finished report to make selections to limit the data in the report. When running a report that uses prompts, a user's experience is affected by the prompt-processing time and by the report-processing time.

If you add prompts to your report, do the following:

- Minimize the number of prompts used for a report.
- Avoid using high-resolution images for Image prompts. It is recommended that you do not use an image on a report that exceeds 100 dots per inch (dpi). For best performance, use images of 50 dpi or lower.
- When defining prompts, under the What Values Should Be Shown to the User menu, choose either None or All Values for the fastest performance. Avoid using the Filter Limited Values option. This option restricts the prompt selections that the report displays. The restriction is based on other filters and prompts that are applied to the report. If a report contains large volumes of data, this option can slow reporting performance.

When deciding whether to select the None, All Values, or Filter Limited Values option, it is recommended that you strike a balance between the level of reporting performance that you want and the optimal presentation of selectable values to users.

Provide Drilldown Links to Detail Reports

Instead of creating a report that presents a long list of data tables, charts, and graphs, do the following:

- Design an initial report to show the summary information or trends, and let the user drill down on the details.
- Build reports for more detailed information by targeting data from the first report. Then, provide drilldown links to the summary report.

The following procedure describes how to link reports to tables.

To link reports to tables

- 1 Click the Format Column icon to open the Column Properties dialog box.
- 2 Click the Column Format tab.
- 3 In the Value Interaction Type drop-down list, choose Navigate.
- 4 In the Navigate to Another Analysis field, browse for a detailed report that you want to drill down on, and then click OK.

The following procedure describes how to link reports to charts.

To link reports to charts

- 1 Click the Additional Charting Options icon on the Chart Edit page (under the Analysis: Report Title bar, on the left side of the page).

- 2 Click the Interaction tab.
- 3 Select Navigate and browse for a detailed report to drill down on from the chart.

Limit the Number of Set Operations

Advanced features allow you to combine queries. You can then perform set operations, such as unions, intersections, and other joining actions on those queries to build a final report. The greater the number of query results combined, the more processing time is required to run the final report. For fastest processing, limit the number of set operations to no more than three.

Clarify HTML Code and Narratives

When using HTML in connection with SQL, do the following:

- Make sure that the HTML is clear and precise and does not contain any unnecessary tags or superfluous information.
- Make sure the narratives are clear and precise and do not contain unnecessary instructions.

Precise narratives make the specified formatting more efficient and reduce performance issues.

Remove Columns in Pivot Tables

Pivot tables allow you to show the report in multiple views without writing multiple reports, but they also might affect performance. Whenever possible, remove the columns from the report criteria (in Step 1 – Define Criteria) that are not used in the pivot table itself.

Use Chart Pivoted Results

Whenever possible, for each pivot table that requires a chart, use the Chart Pivoted Results option instead of creating a separate chart view. Multiple charts in a report can require more processing, because Oracle CRM On Demand must create the charts individually, rather than simultaneously with the pivot table.

Ensure that Reports Are Scalable

Reports might run well in a test before all of your production data has been imported. After all the production data has been imported, the increased data volume adversely affects reporting performance. If you are in the process of implementing Oracle CRM On Demand, allow time to retest and tune reports after all the production data has been imported.

Use Optimized Code and UTC Fields in Filters

Many reporting subject areas include special fields in their dimensions that are optimized to reduce the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Both optimized and nonoptimized fields produce the same results in reports, but using the optimized field in the filter generates faster queries. This method is faster than using the nonoptimized field. Using these fields in filter conditions reduces additional table joins and avoids timestamp conversions that are based on your company's time zone.

Note: These optimized fields support language translations for all supported languages, but they do not support record type renaming.

To determine if optimized filtering fields exist for a specific reporting subject area, see the online help for that subject area, and look for the heading *Optimized Filtering Fields*.

15 Dashboards

The Dashboard Homepage shows a list of the dashboards that are available to you. Dashboards can display saved requests, images, charts, tables, text from Oracle CRM On Demand Answers, and links to Web sites and documents. A *dashboard* consists of one or more pages, which appear as tabs across the top of the dashboard.

Oracle CRM On Demand provides prebuilt dashboards. In addition, users who have the Manage Dashboards privilege in their role can create interactive dashboards that provide customized views of corporate and external information. If your role has this privilege, you can use the Dashboard Editor in Oracle CRM On Demand Answers to add content to an interactive dashboard by dragging and dropping the content from a selection pane to the dashboard layout page. The layout page consists of columns to align the content, and each column contains sections that hold the content. The appearance of a dashboard, such as the background colors and the size of text, is controlled by styles. You can also change the dashboard appearance, using the cosmetic formatting dialog box.

NOTE: You cannot change the prebuilt dashboards provided in Oracle CRM On Demand.

Interactive dashboards can contain three types of content:

- Dashboard objects
- Content that is saved in the Oracle CRM On Demand Presentation Catalog
- Views of folders in the Oracle CRM On Demand Presentation Catalog

Restrictions That Apply When Creating or Viewing Dashboards

When creating or viewing interactive dashboards, note the following restrictions:

- A user who creates or edits an interactive dashboard can add any reports to the dashboard to which he or she has access.

The reports are stored in folders. Access to these folders is determined by user roles. The Manage Dashboard privilege allows users to create and edit interactive dashboards. It does not include the Manage Custom Reports privilege. The Manage Custom Reports privilege provides full access to all report subfolders and reports under the Company Wide Shared Folder. For more information about folder visibility, see the [Reports](#) (on page 675) and [Setting Up User Visibility to Shared Report Folders](#) (on page 690) topics.

- The reports that are added to the interactive dashboards might not be visible to all users in the company. Access to reports depends on the user role.

If a user's role does not allow the user to view a certain report on a dashboard, then an error message is displayed on the dashboard.

Dashboards

- If a report is deleted after it has been added to a dashboard, a user editing the dashboard sees an exclamation mark (!) beside the report name in the Dashboard Editor. If a user is viewing the dashboard, then an error message is displayed.
- The periods in your reports might be based on your company's fiscal calendar, which might differ from a standard calendar. For example, your company's fiscal year might begin on June 1 of each calendar year. If your company has recently changed its fiscal calendar year in Oracle CRM On Demand, then review historical analyses with caution if they span multiple years. If data in your reports is based on your previous fiscal calendar, then it cannot be aligned with data using a new fiscal calendar.

The following table describes the terms in the Dashboard Editor in Oracle CRM On Demand Answers.

Term	Definition
Columns	Columns are used to align the content on a dashboard. The sections within columns hold the content. You can create as many columns on a dashboard page as you want. Every new dashboard page automatically contains one empty column with one empty section in it. The columns used in dashboards are not related to the columns used in reports.
Dashboard Objects	Dashboard objects are items that are used only in a dashboard. Examples of dashboard objects are sections that hold content and navigation links.
Folders	Folders are organizational constructs that hold content saved in the Oracle CRM On Demand Presentation Catalog, such as requests created with Oracle CRM On Demand Answers. A folder is similar to a UNIX directory or a Microsoft Windows folder.
Pages	<p>Pages contain the columns and sections that hold the content of a dashboard. Every dashboard has at least one page. In the Dashboard Editor, pages are identified by tabs across the top of the dashboard. Multiple pages are used to organize content. For example, you might have the following pages:</p> <ul style="list-style-type: none">■ One page to store results from Oracle CRM On Demand Answers, which you refer to every day■ One page that contains links to the Web sites of your suppliers■ One page that links to your corporate intranet
Results	Results, also called reports, are the output returned from the Oracle CRM On Demand server. The results match the request criteria specified using Oracle CRM On Demand Answers. The default format for viewing results in a dashboard is to show them in a table. Results can also be shown in other formats, such as charts. You can examine and analyze results, save or print them, or download them to a spreadsheet.
Sections	Sections appear in columns in the dashboard layout. They hold the content that you drag and drop from the selection pane and that you use to organize the content within a column.
Styles	Styles control how dashboards and results are formatted for display, such as the color of text and links, the font and font size, the borders in tables, the colors and attributes of charts, and so on. Styles are organized into folders that contain cascading style sheets (files with a .css extension), images, and

Term	Definition
	chart templates. You can override some elements in the style sheets, such as the table borders and text size, when formatting results in Oracle CRM On Demand Answers.
Presentation Catalog	<p>The Oracle CRM On Demand Presentation Catalog stores the content created using Oracle CRM On Demand Answers. The types of content stored in the Presentation Catalog include:</p> <ul style="list-style-type: none"> ■ Requests created with Oracle CRM On Demand Answers ■ Filters that are applied to results ■ Information about dashboards

Related Topics

See the following topics for related information:

- [Managing Dashboards](#) (on page 963)
- [Reports](#) (on page 675)

Managing Dashboards

If your role has the Manage Dashboards privilege, you can use the dashboard editor in Oracle CRM On Demand Answers to create and edit interactive dashboards. To manage dashboards, do the following tasks:

- [Creating Interactive Dashboards](#) (on page 964)
- [Adding Pages to Interactive Dashboards](#) (on page 965)
- [Adding and Displaying Content on Interactive Dashboard Pages](#) (on page 966)
- [Renaming Dashboard Objects](#) (on page 976)
- [Deleting Dashboard Objects](#) (on page 977)
- [Changing the Properties of Interactive Dashboards](#) (on page 978)
- [Changing PDF and Printing Options on Interactive Dashboards](#) (on page 977)
- [Creating Prompts for Interactive Dashboards](#) (on page 980)
- [Changing the Name or Description of an Interactive Dashboard](#) (on page 983)
- [Viewing Dashboards](#) (on page 984)
- [About Guided Navigation in Interactive Dashboards](#) (on page 984)
- [About Subject Areas in Reports](#) (on page 703)
- [Usage Notes on Subject Areas](#) (on page 985)

Creating Interactive Dashboards

This topic describes how to create a new interactive dashboard.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To create an interactive dashboard

- 1 Click the Dashboard tab.
- 2 On the Dashboard page, click the Manage Dashboards link.
- 3 On the Manage Dashboards page, click New Dashboard.
- 4 On the Dashboards Edit page, enter the name and description for the dashboard, and then click Save.
The Manage Dashboards page is displayed again.
- 5 On the Manage Dashboards page, click the Design link for the dashboard that you created.

The dashboard editor in Oracle CRM On Demand Answers appears in a separate window, independent of the other Oracle CRM On Demand pages. The name of the new dashboard appears at the top of the page

NOTE: Newly created dashboards contain one blank page. Dashboards that contain only one page do not display the page name as a tab at the top of the dashboard. Dashboard page names appear at the top of a dashboard only when the dashboard contains multiple pages.

NOTE: The maximum number of dashboards that can be displayed on the Dashboards drop-down menu is 199. If you create more dashboards, you cannot access them using the Dashboards drop-down menu.

When you have created your dashboard, you can add content to the dashboard. For information on how to manage dashboard content, control the appearance of dashboards, and add pages to dashboards, see the following topics:

- [Adding Pages to Interactive Dashboards](#) (on page 965)
- [Adding and Displaying Content on Interactive Dashboard Pages](#) (on page 966)
- [Changing the Properties of Interactive Dashboards](#) (on page 978)
- [Creating Prompts for Interactive Dashboards](#) (on page 980)

Navigating to the Dashboard Editor

In the dashboard editor in Oracle CRM On Demand Answers, you can add content to interactive dashboards. You can also control the appearance of the dashboards, and rename and delete objects on them.

NOTE: You cannot change the prebuilt dashboards provided in Oracle CRM On Demand.

This topic describes how to navigate to the dashboard editor to work with existing interactive dashboards. If you want to create a new dashboard, see [Creating Interactive Dashboards](#) (on page 964).

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To navigate to the dashboard editor

- 1 Click the Dashboard tab.
- 2 On the Dashboard page, click the Manage Dashboards link.
- 3 On the Manage Dashboards page, in the record-level menu for the dashboard that you want to edit, select Design.

The dashboard editor in Oracle CRM On Demand Answers appears in a separate window, independent of the other Oracle CRM On Demand pages.

The following procedure explains how to select the dashboard page that you want to work with.

To select a dashboard page

NOTE: If you were already working on a dashboard page, performing this action saves any changes you made to the page that you were working on.

- From the Page drop-down list next to the name of the dashboard on the Dashboard Editor page, select the page that you want to edit.

Adding Pages to Interactive Dashboards

You can add pages to an interactive dashboard.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add a page to an interactive dashboard

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 On the Dashboard Editor page, click the Add Dashboard Page icon near the top of the page.



- 3 Enter a name and a description for the dashboard page.
- 4 Click OK.

The new page appears on the dashboard.

NOTE: If there is only one page in the dashboard, the page name will not appear on a tab. Tabs appear only when there is more than one page, so you can click the tabs to move between the pages.

Adding and Displaying Content on Interactive Dashboard Pages

The following topics describe how to add and display content on interactive dashboard pages.

NOTE: To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

- [Navigating to the Dashboard Editor](#) (on page 964)
- [Adding Pages to Interactive Dashboards](#) (on page 965)
- [Controlling the Appearance of Interactive Dashboard Pages](#) (on page 967)
- [Making Content Appear Conditionally on Interactive Dashboard Pages](#) (on page 968)
- [Adding Guided Navigation Links to Interactive Dashboard Pages](#) (on page 969)
- [Adding Text Links and Image Links to Interactive Dashboard Pages](#) (on page 970)
- [Adding Views of Presentation Catalog Folders to Interactive Dashboard Pages](#) (on page 972)
- [Adding Content Saved in the Presentation Catalog to Interactive Dashboard Pages](#) (on page 973)
- [Controlling How Results Display When Users Drill Down in Interactive Dashboard Pages](#) (on page 973)
- [Editing the Properties of Interactive Dashboard Prompts and Reports](#) (on page 974)
- [Applying Formatting to Interactive Dashboards](#) (on page 975)

Related Topics

See the following topics for related information about interactive dashboards:

- [Creating Interactive Dashboards](#) (on page 964)
- [Renaming Dashboard Objects](#) (on page 976)
- [Deleting Dashboard Objects](#) (on page 977)
- [Changing the Properties of Interactive Dashboards](#) (on page 978)
- [Changing PDF and Printing Options on Interactive Dashboards](#) (on page 977)
- [Creating Prompts for Interactive Dashboards](#) (on page 980)
- [About Guided Navigation in Interactive Dashboards](#) (on page 984)

Controlling the Appearance of Interactive Dashboard Pages

This topic explains how to control the appearance of the dashboard pages using the dashboard editor. For more information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

Working with Columns in Interactive Dashboard Pages

Columns are used to align the content on a dashboard. The sections within the columns hold the content. You can add or remove columns, set the width in pixels or as a percentage of the dashboard page, and break columns.

When you have more than one column on a dashboard page, you can break the columns to arrange them on the page. (The drag-and-drop feature does not reposition the columns.) For example, if you have two columns side by side, breaking the rightmost column causes it to move beneath the first column, and both columns will span the width originally occupied when they were side by side. If you have three columns side by side, breaking the middle column causes the two outer columns to move beneath the first column, and the first column spans the width originally occupied by the first two columns.

To add a new column

- Click the Add Column icon near the top of the Dashboard Editor page.



The column is added to the dashboard page.

To set the width of a column

- 1 Click Properties, and choose Column Properties.
- 2 In the Column Properties dialog box, expand the Additional Formatting Options link.
- 3 In the Additional Formatting Options section, specify the column width:
 - To specify the width in pixels, enter the number of pixels, for example, 200.
 - To specify the width as a percentage of the dashboard page, use the percent (%) sign, for example, 20%.
- 4 Click OK.

To break a column

- Click Properties, choose Insert Column Break, and then select the appropriate type of break.

If you break the column again, the column layout reverts to the previous layout.

Adding Sections to Interactive Dashboard Pages

Sections are used within columns to hold the content of a dashboard. Sections are aligned vertically by default. You can drag as many sections as you want into a column.

If you drag and drop content into a column without first adding a section to hold the content, a section is created automatically.

If you drag a section from one column into another column, any content in that section is also included.

To add a section to a column

- From the selection pane, drag and drop a Section object from the Dashboard Objects area into the column.

The column is highlighted when you are at an appropriate location in the column to drop the section.

Making Sections Appear Horizontally in Interactive Dashboard Pages

The default alignment for sections is to align them vertically.

To make a section appear horizontally

- Click Properties for the section, and choose Arrange Horizontally.

Saving Changes to Interactive Dashboard Pages

You can save your changes at any time.

To save changes to an interactive dashboard page

Perform one of the following actions:

- Click Save.
- Leave the page that you are working on in the dashboard editor.

For example, your changes are saved if you add or edit another page, change the dashboard properties, or modify a prompt, filter, or request.

Making Content Appear Conditionally on Interactive Dashboard Pages

You can make an entire section of a dashboard and its content appear conditionally based upon the results returned for a particular Oracle CRM On Demand Answers request. You can use this functionality to guide

users as they view the dashboards. For more information about guiding users in this way, see [About Guided Navigation in Interactive Dashboards](#) (on page 984).

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To make content appear conditionally on an interactive dashboard page

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 On the Dashboard Editor page, click Properties for the section that contains the content, and then select Guided Navigation.
- 3 In the Guided Navigation Properties dialog box, specify your choices, and browse to select the request from the Presentation Catalog.
- 4 Click OK.

Adding Guided Navigation Links to Interactive Dashboard Pages

Guided navigation links in interactive dashboard pages can be static or conditional. Static links always appear. Conditional links appear only if the results meet certain criteria. You can use this functionality to guide users while they view the dashboards. For more information about guided navigation, see [About Guided Navigation in Interactive Dashboards](#) (on page 984).

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add a guided navigation link to an interactive dashboard page

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 On the Dashboard Editor page, drag and drop a Guided Navigation Link object from the selection pane into a section in the dashboard page.
- 3 Click the Properties button for the link.
- 4 In the Guided Navigation Link Properties dialog box, do the following:
 - If you want to make the link conditional, select Yes for the Reference Source Request option and then specify the source request.
 - Specify the link properties.

NOTE: For URLs, provide the full path.

- 5 Click OK.

Adding Text Links and Image Links to Interactive Dashboard Pages

You can add text links and image links to a dashboard, and specify what is to happen when a user clicks the links. For example, you can direct users to another Web site or dashboard, open documents, launch applications, or perform any other action that your browser supports. You can also add an image or text only, without any links.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add a text link or image to an interactive dashboard page

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 From the selection pane on the Dashboard Editor page, drag and drop a Link or Image object on to a section in the dashboard page.

- 3 Click the Properties button for the object.

The Link or Image Properties dialog box appears.

- 4 Specify your choices:

- For a text link, enter the text into the Caption field.
- For an image link, enter the location and name of the image into the Image field.

Specify the location as a URL. The following are examples:

`http://imageserver/MyImage.gif`
`/DashboardFiles/image.gif`

If the image is not on the local server, the URL must include `http://`. If the image is for use in a shared environment, it must be located on a network drive that is accessible to all users.

If you want a caption for the image, enter a caption for the image in the Caption field, and use the Layout drop-down list to choose where the caption is to appear relative to the image.

- 5 Specify what is to happen when the user clicks the text or image:

- To specify that a request or dashboard is to appear when the user clicks the link or image, specify the destination as Request or Dashboard, and click the Browse button to select the request or dashboard.
- To specify that another action is to occur, such as opening a Web site, document, or program, specify the destination as a URL, and enter the full path into the field that follows the Destination options. In

the Target area, choose whether the destination is to appear in the user's existing browser window or in a new window.

A link is defined as any URL (Uniform Resource Locator) that your browser can interpret. URLs can point to Web sites, documents, images, FTP sites, newsgroups, and so on. Depending on your browser, the following are examples of valid URLs:

`http://home.netscape.com/index.html`

`ftp://ftp.microsoft.com`

`news:news.announce.newusers`

See the following table for more information about the kinds of internal or external content to which you can link.

NOTE: Your company administrator can create a virtual directory called `\DashboardFiles` on the Presentation server for shared documents, and map the virtual directory to a shared network directory of the same name. This virtual directory allows users with the appropriate permissions to publish files to this folder, and reference these files by their relative URL names rather than by their fully qualified network share names, for example, `\DashboardFiles\AnnualReport.doc` instead of `\\SharedServer\CommonShare\DashboardFiles\AnnualReport.doc`.

TIP: When choosing whether the destination is to appear in the user's existing browser window or in a new window, note the following information. For every action except sending mail and executing a program, you can control how the link is to appear. Choose the current window when you want the action to occur in the display pane of the dashboard. The dashboard remains active, but in the background. Choose a new window when you want the action to take place in a new browser window.

NOTE: To add text or an image only, without any links, leave the field that follows the Destination options blank.

6 Click OK.

The following table shows link options for adding a text link or image using the dashboard editor.

Link Option	Comments
Web site or document	<p>You must locate the URL, or address, for the site or document. You can copy the destination address from your browser's address or location box, and then paste it.</p> <p>For a Web site, you can omit the <code>http://</code> portion of the address if the URL resides on your Web server, such as your intranet site.</p> <p>If the URL resides on your organization's Web server, you can enter the relative address of the file. For example:</p> <p style="text-align: center;"><code>\DashboardFiles\Logo.gif</code></p>
Local or shared document	<p>If the document is for use in a shared environment, it must be located on a network drive that is accessible to all users. Examples of the kinds of documents that you can open are spreadsheets containing recent sales reports, a slide presentation introducing a new product, a Microsoft Word document containing your company's annual report, a graphic file that contains a map from the airport to your corporate headquarters, and so on.</p> <p>For example, if the document is for your use only, a sample location might</p>

Link Option	Comments
	<p>be:</p> <p><code>c:\mycomputer\reports\report.doc</code></p> <p>For a shared document, specify the UNC name, for example:</p> <p><code>\\ALLUSERS\reports\report.doc</code></p>
Send email to a specified user	<p>You must know the mailto URL, for example:</p> <p><code>mailto:support@oracle.com</code></p> <p>When the user selects this link, the browser launches the email application with the To: field filled in. (The browser controls the launching of the email program.)</p>
Execute a program	<p>If the program is for use in a shared environment, it must be located on a network drive that is accessible to all users. You can use this feature to download and run an application. (The operating system controls the launching of the application.) For example, if you want to launch Microsoft Word for your use only, a sample location might be:</p> <p><code>c:\MSOFFICE\OFFICE\winword.exe</code></p> <p>For a multiuser-licensed program on a shared drive, specify the UNC name for the location, for example:</p> <p><code>\\ALLUSERS\SOFTWARE\MSOFFICE\OFFICE\WORD\winword.exe</code></p>
Refresh your browser using JavaScript	<p>Your browser must support JavaScript in order to use the following example.</p> <p><code>javascript:window.location.reload()</code></p> <p>In the Target area, choose the option Current Window.</p>

Adding Views of Presentation Catalog Folders to Interactive Dashboard Pages

You can add a view of an Oracle CRM On Demand Presentation Catalog folder and its contents, such as saved requests, to a dashboard. For example, if you have a collection of saved requests that you run frequently, you can open the folder in the dashboard, navigate to a saved request, and click it to run it.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add a view of a Presentation Catalog folder to an interactive dashboard page

1. Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 From the selection pane, drag and drop a Folder object on to a section in the dashboard page.
- 3 Click the Properties button for the folder.
The Folder Properties dialog box appears.
- 4 Browse to select the folder, and click OK.
- 5 Click OK to save the properties.

Adding Content Saved in the Presentation Catalog to Interactive Dashboard Pages

You can add content that you or someone else has already saved in a shared folder or dashboard, such as dashboard prompts and reports. To locate the content, you can browse by looking for the Presentation Catalog folder that the content is stored in, or for the dashboard that it appears on.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To add content saved in the Presentation Catalog to interactive dashboard pages

- 1 Navigate to the dashboard editor.
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).
- 2 From the selection pane on the Dashboard Editor page, in the Saved Content area, navigate to the folder or dashboard that contains the content you want to add to the dashboard.
- 3 Locate the content that you want to add, and drag and drop it into a section in the dashboard page.
This step adds a shortcut to the content that was saved in the Presentation Catalog. If the content changes, the change will be reflected on the dashboard page.
For information about editing the properties of dashboard prompts and reports, see [Editing the Properties of Interactive Dashboard Prompts and Reports](#) (on page 974).

Controlling How Results Display When Users Drill Down in Interactive Dashboard Pages

You can control how results are displayed when a user drills down on a report in an interactive dashboard. The results can be displayed in one of the following ways:

- The new results can be displayed directly in the dashboard, replacing the original report.
This is the default behavior. The area occupied by the original report resizes automatically to hold the new results.

- The entire dashboard can be replaced with the new results.

This behavior is controlled by the Drill in Place option in the dashboard editor. The option is set at the section level, which means that it applies to all drillable reports within the section. Users can click the browser's Back button to return to the original report or the dashboard.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To control how results display when users drill down in interactive dashboard pages

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 On the Dashboard Editor page, click the Properties button for the section and make your selection for the Drill in Place option:

- To show the new results directly in the dashboard, click Drill in Place to select it. A check mark appears next to this option when it is selected. This is the default behavior.
- To replace the dashboard with the new results, click Drill in Place to remove the check mark.

Editing the Properties of Interactive Dashboard Prompts and Reports

You can edit the properties of interactive dashboard prompts and reports added to a dashboard from the Presentation Catalog.

NOTE: When you edit the properties of interactive dashboard prompts and reports as described here, any other changes that you made to the page you are working on are also saved.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To edit the properties of an interactive dashboard prompt

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 On the Dashboard Editor page, click the Properties button for the dashboard prompt and click Modify. The Dashboard Prompt page appears.
- 3 Make your changes to the dashboard prompt.
- 4 Click Save to save the dashboard prompt.

To edit the properties of a report

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 On the Dashboard Editor page, click the Properties button for the report.

- 3 Select the property that you want to modify:

- **Display Results**

If you select the Embedded in Section option, the request will be executed automatically and the results displayed directly in the dashboard. This option is selected by default for reports.

Alternatively, you can select to display the request as a link that users must click to execute the request, and you can specify whether the results are to show in the dashboard or in a separate window.

- **Report Links**

This option opens the Report Links dialog box, where you can select the links that you want to appear with the report on the dashboard page.

- **Show View**

This option shows the available views of the report constructed in Oracle CRM On Demand Answers. You can select the view that you want to see.

- **Modify Request**

This option displays the Criteria tab in Oracle CRM On Demand Answers, where you can modify the request that generates the report.

Applying Formatting to Interactive Dashboards

In the dashboard editor in Oracle CRM On Demand Answers, a formatting dialog box provides access to and control over the visual attributes of dashboards. Depending on the object that you are formatting, the dialog box displays different options, such as font, cell, and border controls, background color, and additional formatting options, such as cell padding. The formatting affects the visual appearance of the columns and sections on a dashboard, such as background color and borders.

When selections for horizontal and vertical alignment appear, they are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of the other columns.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To apply formatting to an interactive dashboard

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 In the Dashboard Editor page, click the Properties button for a column or section and choose the Column Properties or Format Section option.
- 3 In the Font area, make your selections for the font family, size, color, style (such as bold), and any effects that you want to apply (such as underlining).

NOTE: For some items, this option is not available.

- 4 In the Cell area, set up the alignment and background color.

NOTE: For horizontal alignment, the most common justification for text data is left. For numeric data, the most common justification is right.

Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

- 5 In the Border area, make your selections for the border position, color, and style of the cell.

TIP: You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position drop-down list.

- 6 To format spacing within the cell, click Additional Formatting Options and specify values for the width and height of the cell contents, and the space above, below, left and right of the contents.

Values are specified in pixels.

- 7 To override the style and class elements specified in Oracle CRM On Demand Answers style sheets, make your selections in the Custom CSS Style Options area:

- a Click the settings that you want to use.
- b Provide the location of the class, style, or style sheet.

NOTE: The advanced style formatting options are for users who know how to work with cascading style sheets.

- 8 Click OK.

Renaming Dashboard Objects

Dashboard objects on an interactive dashboard that do not already have a name are assigned a default name, such as Section 1, Link 1, and so on. You can rename dashboard objects to assign meaningful and descriptive names.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To rename a dashboard object on an interactive dashboard page

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 In the Dashboard Editor page, click the Rename button for the dashboard object.
- 3 In the Rename dialog box, enter a new name for the dashboard object.
- 4 Click OK.

Deleting Dashboard Objects

You can delete dashboard objects from interactive dashboard pages. If the dashboard object that you delete is already saved in the Oracle CRM On Demand Presentation Catalog, the object is deleted from the dashboard page only. It is not deleted from the Presentation Catalog. (Note that users with the appropriate permissions can edit the contents of the Presentation Catalog by clicking Manage on the Catalog tab in the selection pane in Oracle CRM On Demand Answers.)

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To delete a dashboard object from an interactive dashboard page

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 In the Dashboard Editor page, click Delete for the dashboard object.

NOTE: When you delete a column, the other columns on the page might resize automatically to maintain the column alignment.

Changing PDF and Printing Options on Interactive Dashboards

You can specify the page settings and header and footer content for the PDF output from an interactive dashboard. Dashboards and views are printed in Adobe Acrobat PDF format. Adobe Reader 6.0 or greater is required to print using Adobe PDF.

Header and footer formatting appear in HTML and PDF output.

NOTE: The print selections that you specify apply to PDF output only. If you print the PDF on a local or network printer, the print selections specified in your browser are in effect, such as the selection for paper size.

To change PDF and print options

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 Click the PDF and Print Control Properties icon near the top of the workspace.



The PDF and Print Control dialog box appears.

- 3 Make your selections for the page settings.

- 4 To add a header or footer, do the following:

- a Select the appropriate option, and click Edit.

- b Use the options in the dialog box to construct the header or footer.

Headers and footers can each contain up to three lines.

- c To apply cosmetic formatting to a header or footer element, click the formatting button.

For more information on cosmetic formatting, see [Applying Formatting to Interactive Dashboards](#) (on page 975).

- d Click OK to save the header or footer.

- 5 When you finish changing the PDF and printing options, click OK.

Changing the Properties of Interactive Dashboards

You can set the properties for the entire dashboard, such as the style to use, and you can delete, reorder, and hide pages. Changing the dashboard properties automatically saves any changes you made to the page that you were working on.

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To access the Dashboard Properties page for an interactive dashboard

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).

- 2 Click the Dashboard Properties icon near the top of the Dashboard Editor page.



The Dashboard Properties page appears.

Selecting a Style for an Interactive Dashboard

Styles control how dashboards and results are formatted for display. Initially, results are formatted using a default style. Oracle CRM On Demand provides predefined styles that you can choose from.

To select a style for an interactive dashboard

- In the General Properties area of the Dashboard Properties page, select the style that you want to use from the Style drop-down list.

Adding a Description for an Interactive Dashboard

Descriptions are stored but do not appear on the dashboards.

To add a description for an interactive dashboard

- Enter a description for the dashboard in the Description box on the Dashboard Properties page.

Renaming, Deleting, Reordering, and Hiding Interactive Dashboard Pages

This topic provides procedures that describe how to rename, delete, reorder, and hide interactive dashboard pages. The Dashboard Pages area of the Dashboard Properties page shows you the pages for the dashboard. The pages are listed in the same order as their tabs.

When you rename a dashboard you can preserve users' references to the old name. This action creates a shortcut with the old name that points to the renamed dashboard in the Presentation Catalog.

If you are working with a dashboard page, you can hide it from users until your changes are complete.

CAUTION: You cannot undo the actions described in the following procedures by clicking Cancel.

To rename an interactive dashboard page

- In the Dashboard Pages section of the Dashboard Properties page, click the Rename icon to open the Rename Item page, and follow the instructions given on that page.

To delete an interactive dashboard page

- In the Dashboard Pages section of the Dashboard Properties page, click the Delete icon, and confirm the deletion when prompted.

To reorder an interactive dashboard page

- To move a dashboard page up in the list, click the up arrow for the page in the Dashboard Pages section of the Dashboard Properties page.

On the dashboard, the tab for the page moves to the left.

- To move a dashboard page down in the list, click the down arrow for the page in the Dashboard Pages section of the Dashboard Properties page.

On the dashboard, the tab for the page moves to the right.

To hide an interactive dashboard page

- In the Dashboard Pages section of the Dashboard Properties page, select the Hide Page check box for the page.

The page remains visible to any users currently viewing it.

NOTE: You cannot change the permissions on a dashboard page. The Security icon in the Dashboard Pages section of the Dashboard Properties page is disabled.

To change the displayed currency in an interactive dashboard page

- Choose the currency menu, and choose a new currency for the report.

To use this functionality, you must include the Company Active Currencies prebuilt dashboard prompt in the dashboard. For more information on adding a prebuilt content such as a dashboard prompt to a dashboard, see [Creating Prompts for Interactive Dashboards](#) (on page 980). When you have added this prebuilt dashboard prompt, choose the currency menu, and choose a new currency for the report. All currency fields in the dashboard are updated to display the chosen currency. The list of currencies is limited to those currencies for which an exchange rate has been defined.

Creating Prompts for Interactive Dashboards

A dashboard prompt filters the results of the embedded requests to show only the results that match the prompt criteria. A dashboard prompt can filter all the requests embedded in a dashboard or requests on certain dashboard pages only.

You select the columns and operators for the dashboard prompt, and specify how the prompt appears on the dashboard and how users select the values. Your selections determine the content of the reports embedded in the dashboard or dashboard page. In each request that you want the prompt to filter, every column in the dashboard prompt must be present in either the projection list or in the filter, or both. The columns in the request must have the filters set, or the filter condition has to be set to Is Prompted. Columns contained in the prompt that are not included in the request will not filter the request.

If you include multiple columns in a dashboard prompt, you can constrain users' choices for the subsequent selections. For example, suppose one column filters on Region, and the next column filters on District. By selecting the Constrain check box for District, you can constrain the District column to show only districts consistent with the user's selection for Region. If the user chooses the east region from the Region prompt, the District prompt shows the districts in the east region only.

NOTE: The constrained columns are constrained by all the other columns in the prompt. For example, if the prompt contains columns for Year, Region, and District, and Constrain is checked for District, the values shown in District are limited by the values entered in Region and Year.

If you declare a presentation variable in a dashboard prompt, the variable can also be referenced in various areas of a report. The value entered at the dashboard prompt can then be displayed (using the presentation variable) in request results displayed in the dashboard.

After you create a dashboard prompt, save it in a shared folder. After you save a dashboard prompt, you can add it to a dashboard.

Before you begin. To create and edit prompts for interactive dashboards, your role must include the Manage Dashboards privilege.

To create a prompt for an interactive dashboard

1 Click the Reports tab.

2 Click the Design Analyses link.

Oracle CRM On Demand Answers is displayed in a separate window.

3 In the Oracle CRM On Demand Answers window, click any subject area, then click the New Dashboard Prompt icon at the top of the section.

A list of subject areas is displayed.

4 From the list of subject areas, select the subject area that contains the column that you want to use as the filter.

The Dashboard Prompt page appears.

NOTE: If the column is also included in a column filter prompt in an embedded request, its value must be set to a filter in the Create/Edit Filter dialog box in order for the dashboard prompt to filter the embedded request. Setting the value to Is Prompted will not prefilter the current column. All columns in a dashboard prompt must come from the same subject area, and all columns in the dashboard prompt must be included in the embedded requests that you want the dashboard prompt to filter.

5 In the Scope drop-down list on the Dashboard Prompt page, specify whether the dashboard prompt applies to the entire dashboard or a dashboard page.

6 To select a column to use as a filter in the dashboard prompt, click the column name in the selection pane.

You can add multiple columns to a dashboard prompt. If you want to remove a column from the prompt, click Delete for that column.

NOTE: The number of columns that you include in a dashboard prompt can affect performance. For example, columns that show values in a drop-down list require a request to the Oracle CRM On Demand server to populate the list. It is recommended that you limit the number of columns to nine or less.

7 Make your selections for the following options:

a Click the Edit Formula button to display the Edit Column Formula dialog box where you can modify the formula for the column.

- b** Select the operator that you want to use from the Operator drop-down list.
- c** Select the Control type to indicate how users select the value for the filter.

The choices are to select the value from a calendar, a drop-down list, or a multiple list of values, or type it into an edit box.
- d** If you choose a drop-down list:
 - In the Show list, indicate which values you want to appear in the drop-down list. (You can show all values or develop an SQL statement to limit the drop-down list to certain values.)
 - To constrain the choices for a column depending on the selection the user makes from the previous column, select the Constrain check box.
- e** In the Default to list, choose the value that you want users to see initially.

You can show the report defaults, all choices, or a specific value. If you select a specific value, a field appears in which you can type the value.
- f** In the Set Variable list, you can choose whether to populate a variable for the dashboard prompt using a presentation variable.

If you do not want to declare a variable name for this prompt, select None

If you choose Presentation Variable to declare a variable for this prompt, an additional field appears where you declare the variable name.

For example, if you choose Presentation from the drop-down list, you might type myFavoriteRegion to declare this as a presentation variable. A variable declared here can be referenced in requests when viewed in a dashboard.
- g** In the Label box, type a name to use for the filter label.

If you leave the Label box empty, the column label is used as the filter label.
- 8** To reorder columns in the prompt, click the up and down arrows.

Reordering the columns controls the order in which the selections appear to users.
- 9** If you want the selected prompt and all other prompts that follow it to appear on a new line in the filter, click the box in the Group list.
- 10** To preview how the prompt will appear on the dashboard, click Preview (if available).

To save a prompt for an interactive dashboard

- 1** When you have finished creating the dashboard prompt, click Save.
- 2** At the Choose Folder dialog box, save the dashboard prompt to a shared folder, and give the dashboard prompt a descriptive name.

You might also want to indicate in the name whether the dashboard prompt is for an entire dashboard or for a dashboard page.

NOTE: If you save a dashboard prompt in a personal folder, you cannot add the prompt to a dashboard until you move it to a shared folder.

- 3 (Optional) Type a description in the Description box.

To edit a prompt for an interactive dashboard

- 1 Click the Reports tab.
- 2 Click the Design Analyses link.
Oracle CRM On Demand Answers is displayed in a separate window.
- 3 In the Oracle CRM On Demand Answers window, click the Open Analysis link, and locate the prompt in the folder in which it was saved.
- 4 Click the dashboard prompt to edit it.

To add a prompt to an interactive dashboard or dashboard page

- 1 Navigate to the dashboard editor.
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 964).
- 2 From the selection pane on the Dashboard Editor page, in the Saved Content area, navigate to the folder containing the dashboard prompt that you want to add.
- 3 Drag and drop the dashboard prompt into a section in the dashboard page.

If the dashboard prompt's scope is set to Dashboard, the dashboard prompt affects every page of the dashboard, but does not appear on every dashboard page. If the dashboard prompt's scope is set to Page, the dashboard prompt affects only the pages to which you add it. If a dashboard prompt's scope is set to Dashboard, the value selected for the dashboard level prompt overrides the values for the page level dashboard prompts.

Changing the Name or Description of an Interactive Dashboard

Before you begin. To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

To change the name or description of an interactive dashboard

- 1 Click the Dashboard tab.
- 2 On the Dashboard page, click the Manage Dashboards link.

- 3 On the Manage Dashboards page, click the edit link of the dashboard that you want to change.
- 4 On the Dashboard Edit page, change the name or description as needed, then click Save.

Viewing Dashboards

Oracle CRM On Demand provides prebuilt dashboards, which group reports into business areas. In addition, users whose role has the Manage Dashboards privilege can create interactive dashboards.

This topic describes how to view prebuilt and interactive dashboards.

NOTE: If your role does not allow you to view a certain report on a dashboard, or if a report was deleted after it was added to the dashboard, an error message appears on the dashboard where the report would have been displayed.

To view a dashboard

- 1 Click the Dashboard tab.
- 2 In the Select Dashboard drop-down list, select the dashboard that you want to view.
- 3 Click Show.
The dashboard appears.

Related Topics

See the following topic for related information:

- [Managing Dashboards](#) (on page 963)

About Guided Navigation in Interactive Dashboards

Guided navigation can help users to understand business issues and to determine the appropriate actions that they should take, by guiding their exploration of the results obtained from reports. When guided navigation is based on common scenarios and best practices for your industry or organization, it allows users to see and analyze related issues by navigating to a related set of results, another dashboard, or a URL. Guided navigation is specified using the dashboard editor in Oracle CRM On Demand Answers.

There are three types of guided navigation:

- Guided navigation using static links. When specified for a request, the results on the dashboard always include a link to another request, a dashboard, or URL. For example, a report that shows trends in gaps in customer satisfaction can always appear with a link to a report that shows customer satisfaction by product line.

- Guided navigation using conditional links. When specified for a request, a link to another request, dashboard, or URL appears only if the results meet certain criteria. For example, if the number of open critical service requests exceeds a certain threshold, the result set can include a link to a report that shows customer satisfaction by employee.
- Guided navigation using conditional sections. Entire dashboard sections can appear based upon the results returned for a particular request. For example, if the results show that sales are down by 15 percent or greater in the past week, a dashboard section that contains links to the related reports and tools can appear.

The display of static links does not generally affect the dashboard rendering time. The display of numerous conditional links or sections can affect the dashboard rendering time. For information about the dashboard editor, see [Adding and Displaying Content on Interactive Dashboard Pages](#) (on page 966).

Usage Notes on Subject Areas

This topic provides information about date and time subject areas, and quota periods.

Date and Time Subject Areas

Periods in your reports might be based on your company's fiscal calendar, which might differ from a standard calendar. For example, your company's fiscal year might begin on 1 June of each calendar year. If your company has recently changed its fiscal calendar year method in Oracle CRM On Demand, then review carefully historical analyses if they span multiple years. Data in reports based on your previous fiscal calendar method cannot be aligned with data using a new fiscal calendar method.

Quota Periods

Reports that include quota information by year use the closing month of the year. Whereas on the Quota screen, the year shows the starting month of the quota period, which is different from reports. For example, if the quota period runs from November 2009 to January 2010, then the Quota screen shows the year as 2009, but the reports show the year as 2010.

16 Administering Oracle CRM On Demand

Use the Administrator pages to set up and customize Oracle CRM On Demand. For more information about administering Oracle CRM On Demand, see the following sections:

This section	Describes these tasks
Company Administration (on page 995)	Setting Up Your Company Profile and Global Defaults (on page 996) Activating Languages (on page 1006) Verifying License Statuses and Active Users (on page 1006) Defining Your Company's Password Controls (on page 1008) Defining a Custom Fiscal Calendar (on page 1014) Resetting All Passwords (on page 1016) Reviewing Sign-In Activity for a User (on page 1123) Restricting Use to IP Addresses (on page 1017) Reviewing Your Company's Resource Usage (on page 1018) Publishing Company-Wide Alerts (on page 1019) Reviewing Audit Trail Changes with the Master Audit Trail (on page 1024) Managing Currencies (on page 1020) Viewing Service Allotment Usage for Your Company (on page 1026) Viewing Historical Service Allotment Usage (on page 1027) Setting Alerts for Service Allotments (on page 1027) Viewing File and Record Utilization Information (on page 1028)
Application Customization (on page 1030)	Tasks for Record Type Setup Creating and Editing Fields (on page 1043) Administering the Copy Enabled Setting (on page 1046) Setting Up Custom Field Integration Tags (on page 1047)

This section	Describes these tasks
	Setting Up Web Links (on page 1048) Renaming Fields (on page 1050) Using Indexed Custom Fields (on page 1051) Reverting Settings to Defaults (on page 1054) Changing Picklist Values (on page 1054) Customizing Related Item Layouts (on page 1056) Customizing Static Page Layouts (on page 1057) Renaming Field Section Titles (on page 1060) Creating Web Applets (on page 1061) Defining Cascading Picklists (on page 1063) Managing Search Layouts (on page 1064) Managing List Access and List Order (on page 1066) Creating Homepage Custom Reports (on page 1066) Creating Record Homepage Layouts (on page 1068) Customizing the Audit Trail (on page 1069) Specifying Dynamic Page Layouts (on page 1072) Managing the Behavior of Lookup Windows (on page 1075) Tasks for Application Setup Displaying External Web Pages in Tabs (on page 1077) Creating and Managing Action Bar Layouts (on page 1085) Creating Global Web Applets (on page 1086) Uploading Client Side Extensions (on page 1089) Customizing My Homepage for Your Company (on page 1092) Creating New Themes (on page 1093) Enabling Custom Reports in My Homepage (on page 1096) Renaming Record Types (on page 1097) Changing the Icon for a Record Type (on page 1099) Adding Record Types (on page 1099)

This section	Describes these tasks
User Management and Access Controls (on page 1106)	Setting Up Users (on page 1109) Setting Up Users' Sales Quotas (on page 1121) Setting Up Default Books by Record Type for a User (on page 1121) Changing a User's User ID (on page 1122) Resetting a User's Password (on page 1123) Reviewing Sign-In Activity for a User (on page 1123) Reviewing Security-Related Activities for Users (on page 1124) Adding Delegates for Users (Administrator) (on page 1125) Creating Inventory Periods for Users (on page 1126) Deactivating Users (on page 1127) Setting Up Users (Partners) (on page 1129) Changing a User's User ID (Partners) (on page 1131) Resetting a User's Password (Partners) (on page 1132) Deactivating Users (Partners) (on page 1132) Process of Setting Up Access Profiles (on page 1164) Adding Roles (on page 1173) Setting Up Groups (on page 1206) Setting Up Territories (on page 1209) Process of Setting Up Books (on page 1185) Verifying Book Setup for the Administrator Role (on page 1186) Creating Book Types and Book User Roles (on page 1190) Creating Books and Book Hierarchies (on page 1190) Associating Users with Books (on page 1192) Creating Access Profiles for Books (on page 1195) Enabling Books for Your Company (on page 1196) Enabling Books for Users and User Roles (on page 1197) Adding Books to Record Detail Page Layouts (on page 1199) Assigning Records to Books (on page 1200)
Business Process Management (on page 1210)	Creating Workflow Rules (on page 1221) Creating Workflow Actions: Assign a Book (on page 1225) Creating Workflow Actions: Create Task (on page 1228) Creating Workflow Actions: Create Integration Event (on page

This section	Describes these tasks
	<p>1227)</p> <p>Creating Workflow Actions: Send Email (on page 1233)</p> <p>Creating Workflow Actions: Update Field After Wait (on page 1236)</p> <p>Creating Workflow Actions: Update Values (on page 1238)</p> <p>Creating Workflow Actions: Wait (on page 1240)</p> <p>Changing the Order of Workflow Rule Actions (on page 1242)</p> <p>Changing the Order of Workflow Rules (on page 1243)</p> <p>Deactivating Workflow Rules and Actions (on page 1244)</p> <p>Deleting Workflow Rules and Actions (on page 1246)</p> <p>Viewing Workflow Instances (on page 1249)</p> <p>Deleting Instances from the Workflow Monitor (on page 1250)</p> <p>Setting Up Assignment Rules (on page 1257)</p> <p>Mapping Additional Fields During Lead Conversion (on page 1264)</p> <p>Creating Lead Conversion Layouts (on page 1264)</p> <p>Setting Up the Forecast Definition (on page 1267)</p> <p>Updating the Forecast Definition (on page 1273)</p> <p>Setting Up Sales Processes, Categories, and Coaches (on page 1274)</p> <p>Customizing Your Company's Industry List (on page 1281)</p>
Data Management Tools (on page 1282)	<p>Preparing for Data Importing (on page 1324)</p> <p>Linking Records During Import (on page 1317)</p> <p>Importing Your Data (on page 1448)</p> <p>Reviewing Import Results (on page 1452)</p> <p>Exporting Your Data (on page 1454)</p> <p>Reviewing Export Results (on page 1456)</p> <p>Oracle Migration Tool On Demand Client Utility (on page 1462)</p> <p>Oracle Data Loader On Demand Client Utility (on page 1457)</p> <p>Creating Integration Event Queues (on page 1465)</p> <p>Managing Integration Event Settings (on page 1466)</p>

This section	Describes these tasks
Content Management (on page 1468)	Setting Up Product Categories (on page 1469) Setting Up Company Products (on page 1470) Setting Up Price Lists for PRM (on page 1472) Managing Your Company's Attachments (on page 1475) Setting Up Assessment Scripts (on page 1476) Setting Up Report Folders (on page 688)
Web Services Integration (on page 1457)	Downloading WSDL and Schema Files (on page 1458) Reviewing Web Services Utilization (on page 1460)
Life Sciences Management (on page 1483)	Managing Smart Calls (on page 1483)

Additionally, administrators can usually do the following:

- Create custom reports for their own use or for company-wide distribution. For instructions, see [Reports](#) (on page 675).
- Create filtered lists for company-wide distribution. For instructions, see [Working with Lists](#) (on page 69).

For information about using Oracle On Demand Expression Builder, see [Expression Builder](#) (on page 1486).

Processes for Administering Oracle CRM On Demand

The Administrator pages in Oracle CRM On Demand allow you to manage the deployment of Oracle CRM On Demand to your users and the setting up of your data requirements. Using the Administrator pages, you can customize the appearance of Oracle CRM On Demand to meet your specific business requirements. Use the following guidelines to manage your deployment of Oracle CRM On Demand:

1 Review all available resources.

Before you set up a new Oracle CRM On Demand deployment, review the following resources:

- Read the *Oracle CRM On Demand Administrator Preview Guide*. This guide is available to all company administrators and provides information on how to enable functionality in Oracle CRM On Demand. For more information on how to access the *Oracle CRM On Demand Administrator Preview Guide*, click the Training and Support link in Oracle CRM On Demand.
- Review the additional tools, templates, checklists, Web seminars, and guides by clicking the Training and Support link in Oracle CRM On Demand.
- Enroll in the Administration Essentials course offered by Oracle University.

2 Evaluate your business processes and the roles that users play within your organization.

Review the *Oracle CRM On Demand Administrator Rollout Guide* available on My Oracle Support. Download and use the Custom Field Setup Template to plan your deployment properly from the start.

The Custom Field Setup Template is available in the Tools and Templates page in the Training and Support Center in My Oracle Support.

- Define data visibility and how the data will be secured by considering the following factors and functionality:
 - **Access Profiles.** For more information, see [Access Profile Management](#) (on page 1133).
 - **Teams.** For more information, see [Sharing Records \(Teams\)](#) (on page 84).
 - **Books.** For more information, see [Book Management](#) (on page 1177).
 - **Manager Visibility.** For more information, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).
- Define the data model and relevant fields. Evaluate which reports require trend analysis, real-time trend analysis, and the record types that they support.
- Define the following processes associated with validating and interacting with data:
 - Setting up sales processes. For more information see [Setting Up Sales Processes, Categories, and Coaches](#) (on page 1274).
 - Defining lead conversion layouts and field mappings. For more information, see [Lead Conversion Administration](#) (on page 1262).
 - Defining field validation. For more information, see [About Field Management](#) (on page 1033).
 - Defining workflow processes. For more information, see [Business Process Management](#) (on page 1210).
 - Integrating Oracle CRM On Demand with Web services. For more information, see [Web Services Integration](#) (on page 1457).
- Define Customer Test Environments (CTEs) and any additional environments for training and testing.

3 Set up your company.

Each company is unique. In Oracle CRM On Demand, you can customize many company settings so that they match your business setup.

- Set up your company's fiscal year, languages, currencies, exchange rates, and so on.
- Request the appropriate access rights and CTE. For more information on setting up your company, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).

4 Set up your user profiles.

Users in a company have specific roles and responsibilities. Some users have access to certain data, while others do not. Before adding these users, set up the visibility and role for each type of user.

- Set up the access profiles for your company. For more information, see [Access Profile Management](#) (on page 1133).
- Set up the roles for your Oracle CRM On Demand users. For more information, see [Adding Roles](#) (on page 1173).
- Set up your visibility model, for example, books, teams, and so on. For more information, see [Book Management](#) (on page 1177) and [Sharing Records \(Teams\)](#) (on page 84).

5 Configure the data model, for example, add or rename fields, record types, and so on.

Data requirements are also unique in a company. In Oracle CRM On Demand you can add new fields to existing record types, rename fields to match your business terms, or add new custom record types. Before you start to add data, do the following:

- Add the new fields and record types required for the definition of your data model. For more information, see [Creating and Editing Fields](#) (on page 1043) and [Adding Record Types](#) (on page 1099).
- Rename the fields and record types to match your specific business terms. For more information, see [Renaming Fields](#) (on page 1050) and [Renaming Record Types](#) (on page 1097).
- Populate picklists. You can use the import functionality to import large numbers of picklist values to picklist fields quickly. For more information, see [Changing Picklist Values](#) (on page 1054).
- Configure layouts. Display only the fields required for each role and to use dynamic layouts. For more information, see [Customizing Static Page Layouts](#) (on page 1057) and [Specifying Dynamic Page Layouts](#) (on page 1072).
- Configure your processes such as workflows, sales processes, and so on. For more information, see [Business Process Management](#) (on page 1210) and [Setting Up Sales Processes, Categories, and Coaches](#) (on page 1274).
- Configure lists for roles. The first 10 lists appear on a user's homepage. It is recommended that lists do not return large amounts of data. Twenty-five to 100 records is the recommended manageable number of records for daily tasks. It is also recommended to do the following:
 - Use indexed fields whenever possible.
 - In the list, include fields that users want to update frequently.

For more information on configuring lists, see [Creating and Refining Lists](#) (on page 73).

6 Provide information about business metrics by generating reports.

Use the Reports functionality in Oracle CRM On Demand to generate custom reports that are relevant to your business needs, and then make them accessible to users. For more information on reports, see [About Reports](#).

7 Import your data and users.

Use the import functionality to import legacy data to Oracle CRM On Demand. You can import all of your users, or add them all manually through the User Management page. When users have been added, they receive an email with their temporary password to access Oracle CRM On Demand, and they can start working immediately. For more information on importing data, see [Import and Export Tools](#) (on page 1282).

Using Administrator Templates During Setup

You can use administrator setup templates to help you organize your company's information and implement Oracle CRM On Demand efficiently.

After you have entered your information in the templates, you can use the templates as a reference during setup and customization of the application.

To access administrator setup templates

- 1 Click the link for the template you want.
Links for the available templates are shown in the following section.
- 2 Save the template to your computer.
- 3 Open the saved file.

About Usage Tracking in Oracle CRM On Demand

Usage tracking functionality allows companies to monitor and analyze the usage of their Oracle CRM On Demand application, including user usage, application usage, and setup and configuration details. A number of prebuilt reports on usage tracking are provided for reporting on the Oracle CRM On Demand usage. In addition to the prebuilt reports, the Usage Tracking Analysis subject area is available in the Analytics area in Oracle CRM On Demand Answers for companies that want to further analyze their Oracle CRM On Demand usage.

For example, you might want to create reports to provide information about the following:

- Users who did not sign in during the last 30 days
- Record types for which no records were created, updated, or deleted in the last 30 days
- The number of workflow rules, custom fields, and custom tabs that have been created in Oracle CRM On Demand

TIP: For information about reviewing Web services usage, see [Reviewing Web Services Utilization](#) (on page 1460).

To access the prebuilt usage tracking reports and to create new reports in the Usage Tracking Analysis subject area, you must have the Usage Tracking privilege in your user role. The Usage Tracking privilege is enabled by default for the company administrator's role.

About the Usage Tracking Privilege

Company administrators can enable the Usage Tracking privilege for other user roles as necessary. However, before you enable the Usage Tracking privilege for a user role, consider the following implications of enabling the privilege:

- Users who have the Usage Tracking privilege in their user role can access the Usage Tracking Analysis subject area in Oracle CRM On Demand Answers, as well as the prebuilt reports on usage tracking.
- Access to usage tracking data is not secured by any other access settings, such as the access settings for record types in access profiles and user roles. Therefore, users who have the Usage Tracking privilege in their role can access all of the usage tracking data in the Usage Tracking Analysis subject area.

Because some of your company's usage data might be considered sensitive, you must ensure that only the appropriate users are granted the Usage Tracking privilege.

- Usage tracking reporting can result in intensive use of system resources.

If you want to make some usage tracking reports available to certain users, but you do not want the users to have full access to the Usage Tracking Analysis subject area and prebuilt reports, consider creating custom

reports that contain the relevant data. Then, you can store the custom reports in a shared reports folder, and give the users access to the shared folder only.

In Oracle CRM On Demand, you can view data about service allotment usage, see [Viewing Service Allotment Usage for Your Company](#) (on page 1026) and [Viewing Historical Service Allotment Usage](#) (on page 1027) and data about file and record usage, see [Viewing File and Record Utilization Information](#) (on page 1028).

Related Topics

For more information about the Usage Tracking Analysis subject area and about reports, see the following topics:

- [About Prebuilt Reports](#) (on page 682)
- [Usage Tracking Analytic Subject Area](#) (see "Usage Tracking Analysis Analytic Subject Area" on page 764)
- [Getting Started with Answers \(Custom Reports\)](#) (on page 698)

Company Administration

Before you begin. Unless otherwise indicated, to perform the procedures described in the Company Administration section, your role must include the Administer Company Profile privilege.

Click a topic to see step-by-step instructions for the procedures pertaining to Company Administration:

- [Setting Up Your Company Profile and Global Defaults](#) (on page 996)
- [Activating Languages](#) (on page 1006)
- [Verifying License Statuses and Active Users](#) (on page 1006)
- [Defining Your Company's Password Controls](#) (on page 1008)
- [Defining a Custom Fiscal Calendar](#) (on page 1014)
- [Resetting All Passwords](#) (on page 1016)
- [Reviewing Sign-In Activity for All Users](#) (on page 1017)
- [Restricting Use to IP Addresses](#) (on page 1017)
- [Reviewing Your Company's Resource Usage](#) (on page 1018)
- [Publishing Company-Wide Alerts](#) (on page 1019)
- [Managing Currencies](#) (on page 1020)
- [Reviewing Audit Trail Changes with the Master Audit Trail](#) (on page 1024)
- [Viewing Service Allotment Usage for Your Company](#) (on page 1026)
- [Viewing Historical Service Allotment Usage](#) (on page 1027)
- [Setting Alerts for Service Allotments](#) (on page 1027)
- [Viewing File and Record Utilization Information](#) (on page 1028)

Setting Up Your Company Profile and Global Defaults

Both company information and global defaults are set through the Company Profile page.

Company Information. You can enter or edit your company name, addresses for shipping and billing, phone number, and primary contact. If you signed up for a trial period, some information about your company is carried over from your sign-up data.

Global Defaults. You can define your company-wide defaults, which users can override.

CAUTION: The company administrator can change the Country setting. If you change the Country setting, notify Customer Care so that it can take the necessary steps to update your Time Zone setting, as well as your reports and dashboards. Language, Currency, and Time Zone can only be changed by contacting Customer Care.

Before you begin. To understand the effect of these settings, read [About Profile Settings for Users](#) (on page 610).

To perform this procedure, your role must include the Administer Company Profile privilege.

To edit your company profile

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 On the Company Profile page, click the Edit button (or use inline edit) and make changes.
- 5 Save the record.

This table describes some of the fields that appear.

Field	Description
Company Key Information	
Company Sign In ID	A unique identifier for your company. When creating new users this is the first portion of the User Sign In Id (Company Sign In ID/User ID) for the user.
Primary Contact	<p>Defaults to ADMIN or the alias of the first user from your company who signs in, but can be changed to any user. Product update and other important information are sent to the primary contact.</p> <p>To cover situation when the primary contact is not available, you can enter a distribution list as the email address for the primary contact so that more than one person is notified of system failures and other important information. You can do this in either of two ways:</p> <ul style="list-style-type: none"> ■ You can enter an existing distribution list as the email address on the user record for the primary contact. However, you must remember that if the primary contact does something in the system that sends an automated email to his or her email address, the entire distribution list

Field	Description
	<p>receives that notification.</p> <p>■ You can create a new "dummy" user. You could name this user something like "DistributionList", and then enter the distribution list as the email address on the user record for the dummy user. In this case, you are committing one of your licenses just for this task.</p> <p>Note: You cannot make the user specified as your primary contact inactive. Instead, you must select another user for the primary contact before you can change the original primary contact's status to Inactive.</p>
Company Settings	
Default Language	<p>The language used as the default for your users. You can activate additional languages so that users can change the setting for their own use. For information on how to add languages, see Activating Languages (on page 1006).</p> <p>To update this field, contact Customer Care.</p>
Default Locale	<p>The regional settings used as a default for your users. Users can change the setting for their own use at any time from the User Profile page. These settings determine the formatting for dates, time, currency, numbers, and phone numbers.</p>
Default Currency	<p>The currency used as a default for your users. You can activate additional currencies so that users can change the setting for their own use (see Managing Currencies (on page 1020)). However, the currency set here determines the default currency used for forecasts, which are company-wide.</p> <p>To update this field, contact Customer Care.</p>
Default Time Zone	<p>Default time zone for your company.</p> <p>Some functions, such as forecast generation, use the time zone of the hosting facility instead of this default time zone. Contact Customer Care to find out this time zone. Users in other regions can choose to use their local time zone, which is set on the User Profile page.</p> <p>To update this field, contact Customer Care.</p>
Record Preview Mode	<p>The default record preview mode for your company. You can enable the record preview functionality, and specify how the preview window opens. Depending on the setting that you select in this field, a preview window opens when users rest their pointer on a link to a record, or when they click a preview icon that appears when they rest their pointer on a link to a record.</p> <p>The preview window shows the first section of the Detail page of the record. You also have the option of disabling the record preview functionality by selecting Off in this field. By default, this field is set to Click on Preview Icon when Oracle CRM On Demand is first set up for a new company.</p> <p>Users can override the company default setting by specifying a different</p>

Field	Description
	record preview mode in their Personal Detail page.
Inline Edit Enabled	<p>Enables or disables the inline editing feature.</p> <p>When inline editing is enabled, users can edit fields directly on List pages and on Detail pages (that is, without opening the Edit page for the record).</p> <p>Inline editing is supported in record List pages, record Detail pages, and in many linked records on main record Detail pages.</p> <p>Note that the following types of fields in linked records cannot be edited from the Detail page of the main record:</p> <ul style="list-style-type: none"> ■ Fields that are not shown in the Detail page of the linked record itself ■ Calculated fields, for example, Full Name ■ Fields that are read-only on the Edit page of the linked record <p>Also, in cases where the same linked record can show up under multiple main records, the fields that are part of the relationship can be edited. However, the fields that belong to the linked record itself cannot be edited. For example in the Account Team related list on an account record, the Team Role field can be edited, because the field is part of the relationship between the account and the team member. However, the Last Name and First Name fields cannot be edited, because they belong to the user record (of the team member).</p>
Message Center Enabled	<p>Controls whether:</p> <ul style="list-style-type: none"> ■ The Message Center appears in the Action bar. ■ The Notes icon and list of notes is available in Record detail pages. ■ Users can use the Message Center widget.
Record Type Auditable Fields	<p>The maximum number of fields that you can audit for each object, which is shown as a read-only field. The default number is 35, but company administrators can change this value.</p> <p>Note: With each additional field audited, another record must be created in the database when that field is changed. When you audit too many fields at once, it can impact performance when saving the audited record.</p>
Audit Expiry (Days)	<p>The age, in days, of field audit records before they are purged. Company administrators can set this value to a value between 1 and 90 days. To view the value set for your company, go to the Company Security Settings section on the Company Profile page. Note that a value of zero (0) indicates that no field audit records are being purged. Only Oracle CRM On Demand Customer Care can set a value of 0. Company administrators must have the Administer Field Audit privilege to change this setting.</p>

Field	Description
Head-up Display	<p>If the head-up display functionality is enabled, links to the related information sections of the page (such as linked records sections) are available in the head-up display at the bottom of your browser window. Users can also remove the head-up display completely from Detail pages, by turning off the functionality in their personal profiles. For more information on the Head-up Display, see Oracle CRM On Demand Page-by-Page Overview (on page 30).</p> <p>NOTE: The head-up display functionality can be turned on or off at company level, and by each individual user. A user's personal setting overrides the company setting. The colors in the head-up display are determined by the theme you are using. For more information about choosing a theme, see Setting Your Theme (on page 612).</p>
Global Search Method	<p>Select which search method you want to make available to your users in the Search box in the action bar:</p> <ul style="list-style-type: none"> Targeted Search. Searches certain fields to find matches, which the system displays in the Search box. This is the default setting provided with the application. <p>When a user enters values in several fields, it acts as an “and” condition. The system displays the records with fields that match the beginning values of all words within the text box. If wild cards are used, the application does a substring match.</p> Keyword Search. Searches records on the default fields specific to each record type. This allows the user to type in anything within the single text box with each word containing wild cards. This search may impact performance. <p>When a user enters a value in the single box, it acts as an “or” condition. The system displays the records with a matching value in any of the default search fields.</p> <p>For more information, see Finding Records (on page 41).</p>
Fiscal Year Start Month	<p>This field displays the month in which your fiscal calendar begins.</p> <p>This field is initially set when your company is created and cannot be changed by the company administrator.</p> <p>This setting affects reports that measure revenue against your fiscal year.</p> <p>To update this field, contact Customer Care.</p>
Fiscal Year Start Date	<p>This field displays the date within the specified month in which your fiscal year begins.</p> <p>This field is initially set when your company is created and cannot be changed by the company administrator.</p> <p>This setting affects reports that measure revenue against your fiscal year.</p> <p>To update this field, contact Customer Care.</p>

Field	Description
Fiscal Calendar Type	<p>This field displays the type of fiscal year calendar you use. You can select from the following values: Calendar Quarters, 4-4-5, 5-4-4, Custom Fiscal Calendar. This setting affects time-based analyses, business plans, and forecasts. The company administrator cannot change this field.</p> <p>To update this field, contact Customer Care.</p>
Product Probability Averaging Enabled	<p>Determines how the opportunity probability is updated when the user clicks the Update Opportunity Totals button:</p> <ul style="list-style-type: none"> ■ If selected, the opportunity probability is calculated based on the weighted average of probability for each of the linked products: $\text{Opportunity Probability} = \frac{\text{SUM}(\text{Product Expected Revenue})}{\text{SUM}(\text{Product Revenue})}$ ■ If not selected, the probability is not updated as part of the action. <p>NOTE: The Update Opportunity Totals button is located on the Opportunity Detail page, in the title bar in the Products related information section.</p>
Enable Save & Add Product	<p>If this setting is selected and a user creates a new Opportunity record, the Save & Add Product button is displayed in the Opportunity page header instead of the Save button. If this setting is unselected and a user creates a new Opportunity record, the Save & Add Product button is not displayed in the Opportunity page header, only the Save button is available.</p>
Enable Opportunity Revenue Split	<p>Select this option to enable the splitting of opportunity revenue among team members.</p> <p>When this check box is selected, the Refresh Totals and Spread Split buttons are displayed on the Opportunity Team Edit Users page, allowing revenue to be split among team members. The Opportunity Revenue Forecast and My Opportunities page display opportunities where the user is a Team Member with a greater than 0 split revenue.</p> <p>When this check box is unselected, the Refresh Totals and Spread Split buttons are not displayed on the Opportunity Team Edit Users page. The Opportunity Revenue Forecast and My Opportunities page display opportunities where the user is an Opportunity Owner.</p>
Company Theme Setting	
Theme Name	<p>The theme determines the look-and-feel of Oracle CRM On Demand. When Oracle CRM On Demand is first set up for a new company, the default theme is Oracle. To change the theme, click the Theme Name list, and then select the theme that you want for the company. Users can also override this setting when they edit their personal preferences.</p> <p>Themes have no effect on how Oracle CRM On Demand behaves. Company administrators can create custom themes in Oracle CRM On Demand. Contact your company administrator if you want to submit your own themes to use in Oracle CRM On Demand.</p>

Field	Description
Company Data Visibility Settings	
Manager Visibility Enabled	Select this option to allow managers to see the records of the users who report to them directly or indirectly. A user's manager is specified in either the Reports To field or the Reports To (Alias) field on the User Detail page, depending on which of these fields is present on the page.
Enable Parent Team Inheritance	Select this option to enable Opportunity and Contact teams to inherit Account team members. When enabled, any new team member added to the Account team will be also be added to every account-related Contact and Opportunity team.
Default Group Assignment	Select this option to allow group members to share ownership of accounts, activities, contacts, households, opportunities, and portfolios. For more information, see Group Management (on page 1204).
Enable Books	Controls whether the Book selector displays custom books. If this check box is not enabled, the Book selector displays only user books and books for delegates, if delegates exist. CAUTION: Do not select the Enable Books option until you have created your book hierarchy. You cannot deselect this option after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.
Display Book Selector	Enables or disables the Book selector, which you can use to refine searches for records of a particular user, delegate, or custom books.
Integration Settings	
Integration Event Enabled	If you are a new customer, the integration event functionality is automatically enabled. However, if you are an existing customer, the Oracle CRM On Demand integration event functionality must be configured by Customer Care and by your company administrator. Contact Customer Care to request support for Integration Event Administration and to specify the maximum total size of the integration event queues you require.
Web Services R16 Compatibility Mode	Controls whether Web services requests containing the Username and Password tokens are processed as stateless requests or as stateful requests as in Oracle CRM On Demand Release 16 and earlier. This check box is cleared by default for all new companies.
Enable Workflow	If your company has been set up to allow workflow, this setting is displayed. This setting can be activated once you have created the workflow conditions you want to deploy.
Desktop Integration Settings	
Alternate PIM Sync Download URL	This setting is rarely used. However, customers who have configured SSO for Oracle PIM Sync On Demand use it. If your company is using a PIM Sync client other than the standard Oracle PIM Sync On Demand client, set this value to the URL for the custom client that you want to download. The URL must be fully qualified; that is, it must begin with <i>http://</i> .

Field	Description
Disable Access to PIM Sync Download Page	Select this option when using the Alternate PIM Sync Download URL option to prevent users from downloading Oracle PIM Sync On Demand from within Oracle CRM On Demand. For more information, see the field description for Alternate PIM Sync Download URL.
Disable PIM Sync Extended Account Association	When this option is selected, Oracle PIM Sync On Demand does an exact link of contacts with accounts in Oracle CRM On Demand. CAUTION: When this option is selected, Oracle PIM Sync On Demand duplicates any records that are not identical during PIM synchronization.
Disable PIM Sync Account Association	Select this option to disable account matching during PIM synchronization. When this flag is set, the PIM's Company field is mapped to the PIM Company Name field on the contact record for Oracle CRM On Demand, and the standard, account matching methods are ignored. CAUTION: When this option is selected, Oracle PIM Sync On Demand duplicates any records that are not identical during PIM synchronization. For more information on account matching, see About the Synchronization Engine and Field Mapping (on page 640).
Offline Client Edit Access	This setting verifies record edit access either on upload or on download (in previous releases, Oracle CRM On Demand only verified access upon download). It is recommended to verify access at the time data is uploaded. The three options are: Verify on Upload (this is the default value for new customers), Verify on Download, none. Verify on Upload is the recommended option for use by customers. If the blank picklist option is selected, Oracle CRM On Demand verifies access in the same manner as the Verify on Download option.
Company Security Settings	
Company Idle Timeout (minutes)	This is the time allowed in minutes before a user's session ends because of inactivity. If the value for this field is blank, the interactive session timeout setting is determined by the System Default Idle Timeout value. You can view the current System Default Idle Timeout setting, located at the top of the Company Security Settings section, on the Company Profile page. This value is visible when you edit the Company Profile page. You can contact Customer Care to update the Company Idle Timeout value to a value between 10 minutes and 60 minutes.
Authentication Type	Displays which authentication types are allowed for your company. This value can only be assigned by Customer Care. The following values are possible: <ul style="list-style-type: none"> ■ User ID/Password Only - All users must sign in using their Oracle CRM On Demand User ID and password. ■ Single Sign-On Only - All users must sign in using your company's single sign-on mechanism. Oracle CRM On Demand User IDs and passwords are not accepted. ■ User ID/PWD or Single Sign-On - Either User ID and password for Oracle CRM On Demand, or single sign-on can be used to sign in to

Field	Description
	<p>Oracle CRM On Demand.</p> <p>Authentication type can be set for each user by the company administrator on the User Profile page. If the user's value is empty, then the company-level setting is used for that user.</p>
External Identifier for Single Sign-On	<p>Unique company identifier assigned by Customer Care when Single Sign-On is configured for the company. This value cannot be changed by the company administrator, although External Identifiers may be set for each user on the User Profile page.</p>
Sign In Page for UserID/Pwd Authentications	<p>The URL to a company-specific custom Sign In page, which replaces the default Oracle CRM On Demand Sign In page. Typically, the page is hosted on a company Web server. The URL must be fully qualified - (the URL must begin with http:// or https://).</p> <p>This page is displayed after a user signs out or the user's session ends because of inactivity. It is the company's responsibility to direct their users to sign in initially using this page, rather than the default Oracle CRM On Demand page.</p>
Sign In Page for SSO Authentications	<p>The URL to a company-specific custom Sign In page, which is displayed after a user signs out, or the user's session ends due to inactivity if the user signed in to Oracle CRM On Demand originally, using Single Sign-On. Typically, the page is hosted on a company Web server - for example the company's Single Sign-On portal. The URL must be fully qualified (begin with http:// or https://).</p> <p>It is the company's responsibility to direct users to sign in initially, using their SSO Sign In page, rather than the default Oracle CRM On Demand page. If a user who has signed in using SSO signs out and this setting is blank, a generic page is displayed with the message "You have been signed out."</p>
ITS URL for SSO Authentications	<p>SAML Intersite Transfer Service URL that is used for Single Sign-On to Oracle CRM On Demand, assigned by Customer Care when Single Sign-On is configured for the company. This value cannot be changed by the company administrator.</p>
IP Address Restrictions Enabled	<p>See Restricting Use to IP Addresses (on page 1017).</p>
Cross-Site Request Forgery Protection Enabled	<p>Enables a feature that prevents cross-site request forgery attacks. When this check box is selected, users who create custom code that interacts with Oracle CRM On Demand might require a security token to be included as a hidden parameter in their code. For more information about cross-site request forgery protection, see About Cross-Site Request Forgery Protection (on page 1005).</p> <p>This check box is selected by default when your company is set up to use Oracle CRM On Demand, and you cannot change the setting.</p>

Field	Description
Enable IFRAME embedding	For security reasons, this check box is deselected by default and must be selected only when required. By selecting this check box, you allow users to embed Oracle CRM On Demand pages in an iFRAME on another site's Web page. If users try to embed Oracle CRM On Demand in an iFRAME on another site's Web page, and this checkbox is deselected, the Oracle CRM On Demand page expands so that it becomes the parent page. This setting does not affect Oracle CRM On Demand widgets that you embed in desktop applications.
Analytics Visibility Setting	
Reporting Subject Areas	<p>Use this picklist to set the visibility for users who want to view real-time report records in Oracle CRM On Demand Answers. These reports provide real-time analyses of data. You can select one of the following values:</p> <p>Manager Visibility - Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows users to view their own data, and data shared with them by their Account and Opportunity teams.</p> <p>This company-wide setting applies unless users set a value for the Reporting Subject Areas setting in their Personal Detail page. For more information on reports, see Reports (on page 675), particularly the About Visibility to Records in Reports section.</p>
Historical Subject Areas	<p>Use this picklist to set the visibility for users who want to view analytics report records in Oracle CRM On Demand Answers. These reports provide historical or trend analyses, or contain more complex calculations than those found in real-time reports. You can select one of the following values:</p> <p>Manager Visibility - Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows users to view their own data, and data shared with them by the Account and Opportunity teams.</p> <p>Full Visibility - This setting combines the views of Manager and Team Visibility.</p> <p>This company-wide setting applies unless users set a value for the Historical Subject Areas setting in their personal details. For more information on reports, see Reports (on page 675), particularly the About Visibility to Records in Reports section.</p>
Role-Based Can Read All Records	Use this picklist if you want Oracle CRM On Demand Answers reporting to use the Can Read All Records setting on an object basis, as defined on the Record Type Access page within the Role management wizard. For example, if the Can Read All Records visibility setting is selected by your Administrator for your user role on a given object, (by clicking Admin, User Management and Access Controls, Role Management, then editing a role and clicking Record Type Access), you can view all records of that object in Oracle CRM On Demand Answers, provided the Role-Based Can Read All Records setting is enabled either through the Company Profile or your User

Field	Description
	<p>Profile.</p> <p>See About the Role-Based Can Read All Records Setting (on page 611) for guidance on when and how to enable the Role-Base Can Read all Records.</p> <p>If you do not select Role-Based Can Read All Records, then Oracle CRM On Demand Answers reporting uses the visibility set on Reporting Subject Areas and Historical Subject Areas fields.</p>
Communications Settings	
Auto Wrap Up	<p>If you select this setting, Oracle CRM On Demand automatically wraps up the Communication Activity when an agent ends any call or email communication, or when an agent re-assigns voicemails. The agent does not see the Wrap Up form. The activity status is set automatically to Completed and the resolution code is set to Auto Wrap Up.</p> <p>NOTE: This setting does not apply if the agent manually clicks the Wrap Up button on a Communication Activity Detail page. For example, after listening to a voicemail, the agent can click the Wrap Up button on the Voicemail Activity Detail page, to display a Wrap Up form and wrap up the Activity.</p>
Additional Information	
Licensed Users, Active Users, Inactive Users	These numbers are read-only, displaying your licensed number of users along with the current status of users.

NOTE: Some additional fields might appear if your company has certain features turned on.

About Cross-Site Request Forgery Protection

To prevent cross-site request forgery attacks, users who create custom code that contains HTTP POST requests (including Asynchronous Java Script and XML (AJAX) requests) that try to update, create, or delete data in Oracle CRM On Demand must include a security token, as a hidden parameter in their code. If the custom code does not contain the security token, or if the security token is used incorrectly, the request will fail. When the request fails, the user will see an error message indicating that the request cannot be completed, because the key is invalid or has expired, and the user must refresh the page.

The security token that users must include in their code is shown in the following table.

Parameter Component	Token Code
Name	%%%ODReqName%%%
Value	%%%ODReqValue%%%

NOTE: The token code is case sensitive, and must be exactly as shown in the table. Any error in the token code causes the request to fail.

This protection feature for cross-site request forgery is controlled by the Cross-Site Request Forgery Protection Enabled check box on the company profile. The feature is enabled by default when your company is set up to use Oracle CRM On Demand, and you cannot disable it.

Activating Languages

Oracle CRM On Demand is available in many languages. All default text fields supplied with the product, such as fields and picklist values, along with online help and tutorials are shown in the available languages.

However, when you customize fields or picklist values, you must manually enter the equivalents in other languages, if you want those to appear in their translated versions. Otherwise, they appear in the original language in blue text with brackets around them, regardless of the language you selected.

Initially, the only active language is the one that was selected as the company default language when your company signed up for Oracle CRM On Demand.

To make the language choices available to your users, you must activate them.

Before you begin. To perform this procedure, your role must include the Administer Company Profile privilege.

To activate languages

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Languages link.
- 4 In the Active column, select the languages you want to make available to your employees.
NOTE: The formats for displaying dates, times, and currency are determined by other settings, not the Language setting.
- 5 Save the record.

Verifying License Statuses and Active Users

You can verify the license status and compare that to the number of active users. You need a license for each active user. (An *active user* is a user who can access the application.)

The number of licenses also determines the amount of data that the application can store for your company.

Before you begin. To perform this procedure, your role must include the Manage Company privilege.

To verify your license status and active and inactive users

- 1 In the upper right corner of any page, click the Admin global link.

- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 In the Additional Information section on the Company Profile page, verify the numbers of licensed, active, and inactive users.
 - If you have active users who no longer need access to the application, you can free up licenses by deactivating them. For more information on deactivating licenses, see [Deactivating Users](#) (on page 1127).
 - If you want to purchase more licenses, contact your Oracle CRM On Demand sales representative.

About Sign-in and Password Policies

Oracle CRM On Demand provides the highest levels of security for your company. Security constraints have been built in to ensure that only authorized users have access to your data.

Additionally you can enforce certain sign-in, password, and authentication policies to raise the level of security within your company. For example, you can set the sign-in timeout to 15 minutes to better adhere to your corporate security policies. And if any of your users forget their password, they can receive a new one by simply answering a set of validation questions. As an added security measure, you can specify the number of hours for which an active session can last. For example, you can set up a user's active login session to last an hour. When the user reaches the active session limit and tries to perform an action within Oracle CRM On Demand, the user is forced to enter her login credentials before continuing the session.

Security Considerations

Before you set up your sign-in and password controls, you need to carefully consider your security needs. Some of the questions you should answer are:

- What type of user ID do you want to use?
- How long do you want a user's system-generated temporary password to be valid for?
- What will be the maximum number of sign-in attempts that is allowed before a user is locked out of the application?
- How long will the sign-in lockout be for? How often do you want users to change their passwords?
- Do new passwords have to be different from old passwords?
- What is the minimum password length?
- How many security questions must be answered successfully by users to enable them to reset their password if they forget it?
- How many security questions must be answered correctly before the application automatically resets a user's password?
- Do you want to allow users to change their user IDs or email addresses?
- How long do you want a user's active session to last for?

When you have defined your sign-in and password policies, you can implement them in the Company Administration pages in the application.

Password Setting Changes

If you make changes to the password settings, the system does not enforce the changes until the current passwords expire. For example, if you change the minimum password length from seven characters to 10 and a user already has a seven character password, the user can use the seven character password until it expires. At that time, the user will have to create a new password of at least 10 characters.

It is best to set the internal policy and select the settings before adding new users to the system. If, however, you must make a change to your security policy immediately, you have the ability to reset all user passwords. This action generates an email to all the users in your company providing them with a new temporary password. You must have the Reset Passwords privilege to do this.

What Happens When Users Forget Their Password?

Users who have the Reset Personal Password privilege in their role can submit a request to reset their password if they forget it. They can use the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page. You must define the minimum number of security questions and answers that users must provide to have their password reset. When this feature is set up, users can reset their own Oracle CRM On Demand password without the company administrator intervening.

Defining Your Company's Password Controls

You can define the password policy for Oracle CRM On Demand. For example, you can set the password policy to conform to your company's protocols about how long passwords should be and how often they should expire.

To define your company password controls

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Sign In and Password Control link.
- 4 On the Company Sign In and Password Control page, fill in the information, and then save the settings.

The following table describes the settings.

NOTE: To reset their password, users must have the Reset Personal Password privilege in their user role. To reset their password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page, users must also have security questions and answers set up in the system.

Setting	Possible Values	Usage
Sign-in Policy Information		
Company Sign In ID	Text box	Is a unique identifier for your company. When creating new users this identifier will be the first portion of the User Sign In Id (Company

		Sign-in ID) for the user. When new users are created and the Default User ID Type is Company Sign-in ID, the Company Domain part of the user ID is prepopulated with this value. This setting can also be accessed from the Company Profile page.
Maximum Number of Sign In Attempts	3, 5, or 10 attempts	The maximum number of failed sign-in attempts that are allowed before the user's account is locked.
Sign In Lockout Duration	15, 30, 60 minutes or Forever	The length of time that the user's account is locked.
Maximum Session Duration in Hours	0-9999 hours	<p>The length of time that a user's active session can last before the user is asked to reenter his login credentials. This field accepts positive integers from zero (0) through 9999.</p> <p>To view your default value for this setting, go to the Sign In and Password Policies page in Company Administration .</p> <p>When using Oracle CRM On Demand, you must reenter your login credentials when the active session reaches its maximum duration.</p> <p>When using Web services and the active session times out, the Web Services client must reauthenticate to continue using Web services.</p>
Password Control Information		
Expire User Passwords In	30, 60, 90 days, one year, or never expires	The length of time that a user's password is valid. After this period has elapsed, the user is forced to change the password.
Minimum Password Length	Number between 6 and 10	The minimum number of characters that can be used for a password.

Maximum Number of Password Changes	Number between 1 and 20	The maximum number of times that a user's password can be changed as specified in the Password Change Limit Window setting. If a user attempts to change a password more than the specified number of times, the change is not allowed.
Password Change Limit Window	Number of days (from 1 to 7)	The period during which the Maximum Number of Password Changes setting applies.
Your New Password Must Be Different Than Your Old Password	Check box	Applies when a user changes his or her password.
Authentication Information		
Number Of Security Questions To Be Completed	Number between 1 and 8	<p>This setting determines how many security questions and answers a user must set up. The user's questions and answers are stored for future use.</p> <p>NOTE: Users set up their security questions when they sign in to Oracle CRM On Demand for the first time. Users can also change their security questions at any time. For more information, see Setting Up Your Security Questions (on page 616).</p> <p>When users reset their password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page, they must answer a certain number of the security questions that they set up.</p> <p>You can specify that users must set up a larger number of questions than the number they are required to answer when resetting a password. A random selection of the questions the user sets up is displayed to authenticate the user when resetting the</p>

		password.
Number Of Security Questions To Be Answered	Number between 1 and 8	<p>This setting determines the number of security questions that a user must answer when resetting a password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page. When the user submits the request to reset the password, the user receives an email, shortly afterwards, with a link to a temporary page.</p> <p>On the temporary page, the user must answer the number of security questions specified in this setting before the password can be reset.</p> <p>The value in this field must be less than or equal to the value in the Number of Security Questions to be Completed field, because the user cannot be required to answer more questions than the user has set up.</p>
Number Of Days Temporary Sign In Is Valid	Number of days (1 to 14)	This setting determines the number of days that a temporary sign-in password is valid. An email with temporary sign-in information is typically sent when a new user is added, or when the company administrator or Customer Care resets the user's password.
Number Of Temporary Password Sign In Attempts	Number of attempts (1 to 14)	The total number of sign-in attempts allowed using a temporary sign-in password. If this value is exceeded, the user's temporary sign in information becomes invalid, and the user must have the password reset again.
Additional Information		
Allow Users To Change User ID	Check box	If the check box is selected, users who edit their User

		Profile can change their User ID. If the feature is not enabled, only the company administrator can change the user IDs.
Allow Users To Change Email Address	Check box	If this check box is selected, users who edit their user profile can change their email address. If this feature is not enabled, only the company administrator can change the email addresses.
Concurrent Session Option	Allow with Notification, Allow without Notification, and Prevent and Terminate Existing	<p>This setting allows you to manage how Oracle CRM On Demand handles concurrent sessions while using your login credentials.</p> <p>The option, Allow with Notification, allows you to engage in concurrent sessions. However, Oracle CRM On Demand notifies you that another session is in progress, using the same account details. Oracle CRM On Demand also provides notification to the user on the other session.</p> <p>The option, Allow without Notification, allows you to engage in concurrent sessions. However, Oracle CRM On Demand does not notify either user that the other session is in progress.</p> <p>The option, Prevent and Terminate Existing, closes the first and existing session, leaving the second and new session in progress. Users of both sessions are notified of the actions.</p>

About Fiscal Calendars

Two types of fiscal calendar are available in Oracle CRM On Demand:

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- **Standard Fiscal Calendar.** If your fiscal year follows a common calendar (for example, calendar quarters, 5-4-4, 4-4-5), you can use this calendar type in your company profile.
- **Custom Fiscal Calendar.** If your company follows a different calendar, such as 4-5-4, you can define a custom fiscal calendar in Oracle CRM On Demand.

If you use either a standard fiscal calendar or a custom fiscal calendar, a fiscal year is defined once for your company. Each fiscal calendar type automatically allows you to use the defined fiscal periods in Oracle CRM On Demand.

Standard Fiscal Calendars

Standard fiscal calendars are periods that follow a commonly defined calendar, such as a Gregorian calendar, and can start on any day of any month of the year. If you use a standard fiscal calendar in Oracle CRM On Demand, you select one of the following calendar types:

- Calendar Quarters
- 4-4-5 calendar model
- 5-4-4 calendar model

When using standard fiscal calendars, Oracle CRM On Demand automatically generates your fiscal periods up to the year 2020. You can view the settings for your standard fiscal calendar, but you cannot change them. If you want to change your calendar definition, contact Customer Care. Customer Care populates your fiscal calendar with data and specifies your calendar type when your company is being set up.

NOTE: Any changes made to your fiscal year definition are not reflected in Oracle CRM On Demand Reports until a full ETL (Extract, Transform, Load) is run.

To view a standard fiscal calendar definition

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Profile link.
- 3 In the Company Settings section, review the following fields:
 - Fiscal Year Start Month
 - Fiscal Year Start Date
 - Fiscal Calendar Type

NOTE: When changes are made to the definition of a standard fiscal calendar, Oracle CRM On Demand updates all data in reports. However, Oracle CRM On Demand updates only future data in forecasts.

Custom Fiscal Calendars

Custom fiscal calendars are available in Oracle CRM On Demand to accommodate companies that do not use standard calendar months or a common fiscal calendar. Your company administrator defines custom fiscal calendars. You must create a custom fiscal calendar record for each year for which you want to create business plans, objectives, forecasts, or time-based analyses in Oracle CRM On Demand. For more information on defining custom fiscal calendars, see [Defining a Custom Fiscal Calendar](#) (on page 1014).

Defining a Custom Fiscal Calendar

Your company administrator defines the fiscal calendar in Oracle CRM On Demand to conform to your company's fiscal year. Custom fiscal calendars are reflected in all reports, business plans, objectives, and user quotas.

NOTE: To configure the definition of the custom fiscal calendar, your role must include the Manage Company privilege.

To set up your company's custom fiscal calendars, you must do the following:

- 1 Contact Customer Care to enable the use of custom fiscal calendars for your company.
- 2 Define your company's fiscal calendars.
- 3 Verify that the custom fiscal calendar is active within your company.

CAUTION: After you enable the custom fiscal calendar option for your company, you cannot disable this option. It is recommended that company administrators do not enable custom fiscal calendars unless they fully understand the features of fiscal calendars in Oracle CRM On Demand.

Custom Fiscal Calendars and Forecasts

When using custom fiscal calendars, your company's custom fiscal calendar definition is used in the generation of forecasts. Your company administrator must define custom fiscal calendar records prior to activating forecasts. Since forecasts can span more than one quarter in duration, it is possible that a forecast could include data from multiple fiscal years. Therefore, to ensure that sufficient data is available for the forecast series to be generated, a custom fiscal calendar must be created for each year your company wants to generate forecasts. In addition, your company administrator must update your forecast definition before the new custom fiscal calendar definition can be used in forecasts. If the forecast definition is not refreshed prior to the next forecast date, your forecasts are not generated. For more information on updating forecast definitions, see [Updating the Forecast Definition](#) (on page 1273).

To define a new custom fiscal calendar

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
- 4 On the Fiscal Calendar List page, click New Fiscal Calendar.
- 5 From the menu, select the fiscal year that you require.

The name of the fiscal calendar is automatically populated in the Name field, for example, Fiscal Year 2009. This value is read-only.

6 Enter the following information:

- a Description.** Add any extra information about the custom fiscal definition. This field has a limit of 250 characters.
- b Fiscal Quarter 1.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
- c Fiscal Quarter 2.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
- d Fiscal Quarter 3.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
- e Fiscal Quarter 4.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
- f Additional information.** Click the calendar icon to indicate the start of the next fiscal year.

NOTE: A fiscal year cannot be greater than 99 weeks in length. If you enter a value for Next Fiscal Year Start that is greater than 99 weeks from the start date of the previous fiscal year, an error message prompts you to enter a correct value.

7 Click Save.

NOTE: You must create fiscal calendars in sequence, for example, you must create the fiscal calendar for 2010 before you create the fiscal calendar for 2011.

Your new custom fiscal calendar definition is not reflected in Analytics until a nightly ETL (Extract, Transform, Load) is run.

To view a fiscal calendar's detail

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Company Administration section, click the Company Administration link.
- 3** In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
- 4** On the Fiscal Calendar List page, click the name of the fiscal year for which you want to view the fiscal periods.

The Fiscal Calendar Detail page displays the individual fiscal months for the selected year and the next fiscal year start date.

NOTE: If you are moving from a standard fiscal calendar to a custom fiscal calendar, your previous fiscal year records appear as read-only in the Fiscal Calendar List page and all future, fiscal-year records that Oracle CRM On Demand generates are deleted. For more information on standard fiscal calendars, see [About Fiscal Calendars](#) (on page 1012).

To edit your company's fiscal calendar

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
- 4 On the Fiscal Calendar List page, locate the fiscal calendar that you want to update, and click Edit.
- 5 Enter the new details for the fiscal calendar, and click Save.

Any changes to a custom fiscal calendar definition are not reflected in Analytics until a nightly ETL (Extract, Transform, Load) is run.

NOTE: If you have defined a custom fiscal calendar, you can change it by editing the existing calendar definition. However, fiscal calendars prior to the current fiscal year are read-only. You cannot delete custom fiscal calendars.

Resetting All Passwords

You can reset all users' passwords (including the administrator's) at one time.

Usage example 1. When you are setting up your application, create users and set their Status to Active, but don't email their passwords to them. After the setup is completed and the application is ready for use, reset all passwords. This action sends emails to all active users at once, notifying them of their temporary passwords and giving them access to the application.

Usage example 2. You have changed your password control policy and want all users to conform to the new policy. Reset all passwords so that the users must change their passwords when they next sign in.

Before you begin. To perform this procedure, your role must include the Administer Company Profile or Reset Passwords privilege.

To reset all passwords

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 In the Company Profile title bar, click the Reset All Passwords button.

Emails are sent to all the users, notifying them of their new temporary passwords. Users currently signed in are able to continue working but will need to enter their new temporary passwords when they next sign in.

Related Topics

See the following topics for related information:

- [Resetting a User's Password](#) (on page 1123)
- [Setting Up Users](#) (on page 1109)
- [Defining Your Company's Password Controls](#) (on page 1008)

Reviewing Sign-In Activity for All Users

You can review the sign-in history for all the users at your company. The sign-in history page shows which of your users are using the application and when. The sign-in history page also records sign-in activity by Oracle CRM On Demand Customer Care.

Before you begin. To perform this procedure, your role must include the Administer Company Profile privilege.

To review sign-in activity for all users

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Resource Audit section, click the Sign-in Audit link.
- 4 Review the sign-in history for the application.

Related Topics

See the following topic for related information:

- [Reviewing Sign-In Activity for a User](#) (on page 1123)

Restricting Use to IP Addresses

This feature allows your company to restrict access to the system to specific IP address ranges. You can use this feature to ensure that your users only access the system from specific network locations, such as your office. If this feature is enabled, your users can only sign in to the application from machines that have IP addresses within the range you specified.

Before you begin. Contact Customer Care so that they can enable the IP filtering for your company. After that, to perform this procedure, your role must include the Administer Company Profile privilege.

To restrict use to IP addresses

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.

- 3 Click the Security Settings link.
- 4 On the Security Settings page, enter the IP addresses that are acceptable for signing in.
TIP: Review the onscreen information about the correct way to enter IP addresses.
- 5 Save the record.

Reviewing Your Company's Resource Usage

You can review the resource usage for your entire company, including changes to these areas:

- Reset Password
- Forget Password
- Answer Security Questions
- Change SSO Identifier
- Change to User ID
- Change to Email address
- Set Password
- Initial Password
- PIM Sync
- Offline

Before you begin. To perform this procedure, your role must include the Administer Company Profile privilege.

To review your company's resource usage

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Resource Audit section, click the Audit link.
- 4 Review the resource usage history for your company.

Related Topics

See the following topic for related information:

- [Synchronizing with PIMs](#) (on page 637)

Alerts

Click the topic you are interested in:

- [Reviewing Your Alerts](#) (on page 35)
- [Publishing Company-Wide Alerts](#) (on page 1019) (Administrators only)
- [Working with Lists](#) (on page 69)
- [Alert Fields](#) (on page 1020)

Publishing Company-Wide Alerts

Company-wide alerts appear on each employee's My Homepage. You can use alerts to broadcast company-wide information, such as meeting notices and policy changes.

NOTE: Alerts announcing that a forecast has been generated remain on the employees' My Homepage for two days. To extend the period the alert appears, make the changes on the Alert Edit page after the alert first appears. For instructions, follow the procedure in this section.

You can link files or URLs to alerts. For example, when creating a meeting notice alert, you can add a link to a Web page with directions to the meeting location.

Before you begin. (Optional) Create or locate a Web page or file that contains information you want to share. Make sure that the path to the Web page or file is accessible to your users. To perform this procedure, your role must include the Administer Company Profile privilege.

To create or update company-wide alerts

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Alert Management section, click the Company Alerts link.
The Alerts page appears with a list of company alerts.
- 4 On the Alerts page, do one of the following:
 - Click the New button.
 - Click the title of the alert you want to edit, and then click the Edit button.
- 5 On the New Alert or Alert Edit page, complete the required information.
- 6 Save the alert.
- 7 To add an attachment to the alert, click the alert title on the Alerts list page to open the alert details.
- 8 Click the Add Attachment button, and enter the information.
- 9 On the Attachment Edit page, click Save.

10 To add a URL to the alert, click the alert title on the Alerts list page to open the alert details.

11 Click the Add URL button, and enter the information.

12 On the Attachment Edit page, click Save.

Alert Fields

The following table describes the field information you might see in an alert record. If you are an administrator, you can see and update all alert fields. Otherwise, you are restricted to viewing a limited number of alert fields.

Field	Description
Title	Title of the alert as it will appear on My Homepage.
Priority	Priority of the alert, which is indicated by the icon next to it on My Homepage.
Hyperlink	URL or filename and directory path associated with the alert.
Alert Description	Text as it will appear in the alert.
Post Date	Date you want the alert to begin being broadcast across My Homepage.
Expiration Date	Date you want the alert to end being broadcast across My Homepage.
Displayed Hyperlink	Text as it will appear for the hyperlink in the alert. This is required if you have entered a hyperlink. For example, for the Link (URL) "http://company.site/doc_2389.html", you might type "Directions to meeting" for the hyperlink text in the alert.

TIP: You can create filtered lists to limit the type of alert records displayed at one time. For instructions, see [Working with Lists](#) (on page 69).

Related Topics

See the following topic for related information about company-wide alerts:

■ [Publishing Company-Wide Alerts](#) (on page 1019)

Managing Currencies

To allow users to conduct and track business in any currency, you need to activate those currencies. Otherwise, the default currency set up for the company is the only option.

If your employees record transactions in other currencies, you also need to set up exchange rates between those currencies and your company's default currency. The application uses the exchange rates when rolling up revenue for reports and forecasting.

CAUTION: Be sure to set up exchange rates before your users enter transactions for all currencies you activate.

You can enter multiple exchange rates for any active currency. Each entry consists of the Exchange Date and an Exchange Rate for that date. In determining which exchange rate to use for a particular transaction, the application follows these rules:

How Oracle CRM On Demand Converts Exchange Rates Between the Company Default Currency and the User's Default Currency

In this case, a company has the following currencies:

- The default currency for a company is the U.S. dollar (USD).
- This company also has additional currencies activated: the euro (EUR) and pound sterling (GBP).
- This company has defined exchange rates between USD and EUR, and between USD and GBP.
- The user enters the opportunity revenue in EUR. However, the user default currency is GBP.
- Oracle CRM On Demand performs the EUR to GBP conversion as follows:
 - It first converts the opportunity revenue to the company default currency; that is, from EUR to USD.
 - It then converts the opportunity revenue to the user's currency; that is, from USD to GBP.

How Exchange Rates Are Applied to Forecast Rollups

In this case, the following rules apply:

- If there is an exchange rate defined for the same date as the transaction, it uses that Exchange Rate value.
- If no exchange rate is defined for the same date as the transaction but there are exchange rates defined for dates before the transaction, it uses the exchange rate with the date that is nearest to the transaction date.
- If no exchange rate is defined for the same date as the transaction and there are no exchange rates defined for dates before the transaction, it uses the next available exchange rate that has a date *after* the transaction date.

For example, if exchange rates are entered for only 5/15/2004 and 8/15/2004, then this occurs:

- For transactions prior to 5/15/2004, the 5/15/2004 rate is used.
- For transactions between 5/15/2004 and 8/14/2004, the 5/15/2004 rate is used.
- For transactions on or after 8/15/2004, the 8/15/2004 rate is used.

How Exchange Rates Are Applied to Reports

For reports, exchange rates are applied in a more general way than for forecasting. A single exchange rate is determined for each month, and all transactions within a month use that rate. For example, for opportunities, Oracle CRM On Demand uses the Opportunity Close Date that is closest to the Exchange Rate Effective Date. For asset currency-conversions, Oracle CRM On Demand uses the Purchase Date field as the date. For opportunity products, Oracle CRM On Demand uses the exchange rate that is closest to the start date of the product revenue. For other objects, including custom objects 01-03,

Oracle CRM On Demand uses the created date to determine the exchange rate date. For custom objects 04-15, Oracle CRM On Demand uses the Exchange Date field.

The exchange rate assigned to a month is determined as follows:

- If more than one exchange rate exists for a month, the one with the latest date in that month is used.
- If no exchange rates exist for a month, that month's exchange rate is set to the same rate as the closest future month that has a rate defined for it.
- If there are no exchange rates for future months, the first previous month's exchange rate is used.

For example, if exchange rates are defined for 5/10/2004, 5/20/2004, and 8/14/2004, then:

- The May 2004 rate will be the value set for 5/20/2004 (the latest rate set for May).
- The August 2004 rate will be the value set for 8/14/2004 (the only rate set for August).
- April 2004 and prior months will be assigned the rate for 5/20/2004. There are two dates for the month of May.
- June and July 2004 will be assigned the August 2004 rate (closest future month).
- September 2004 and future months will be assigned the August 2004 rate (no future month, so first previous month is used).

In reports, any values that require conversion between currencies will use the exchange rate defined for the month that the transaction falls in, calculated as described above.

NOTE: During forecasting, all opportunities are converted to the company default currency for forecast rollups. However, in reports, revenue fields are converted to the end user's currency amount.

You need to wait until the daily analytics refresh runs when either of these situations occurs:

- A new currency is activated for your company and the exchange rate is set up
- A new currency is selected by a user that no other user for your company has selected (on the Personal Detail page)

The refresh automatically generates any required cross exchange rates. After that, you can run historical or real-time reports.

Whenever users change their default user currency, they must sign out of Oracle CRM On Demand, and then sign in again before reports display data in the newly selected currency.

Before you begin. To perform the procedures for managing currencies, your role must include the Define Currencies privilege. Also, to understand the effect of currency settings, read [About Profile Settings for Users](#) (on page 610).

To activate currencies

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Currency Definition section, click the Currency Definition link.
- 4 On the Currency Setup page, select All Currencies from the drop-down list.

- 5 Click the Edit link for the currency you want to activate.
- 6 On the Currency Edit page, select the Active check box.
- 7 (Optional) On the Currency Edit page, you can change the symbol corresponding to the currency.
For example, you might want to distinguish currencies by their currency codes instead of by their symbols. Therefore, you would change \$ to USD, ¥ to JPY, and € to EUR.
- 8 Save the record.

To define the exchange rates

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Currency Definition section, click the Exchange Rates link.
The Exchange Rate Edit page appears with the latest exchange rates for your activated currencies. If no exchange rate has been defined, it appears blank.
NOTE: The *To Currency* is always the currency that is set for your company. You must enter exchange rates that tell the application how to convert each active currency into that currency.
- 4 To add a new exchange rate for an active currency:
 - a Click the Exchange History link for the Currency row for which you want to add a rate.
On the Exchange Rate page, click New.
 - b On the Exchange Rate Edit page, complete the information.
For Exchange Rate, enter how many units of the *To Currency* it would take to buy one unit of the *From Currency*.
Example: 1 Euro = 1.3 US dollars.
Assuming your company's currency is set to US Dollars (USD), you would enter these values:
 - From Currency: EUR
 - To Currency: USD
 - Exchange Rate: 1.3
- 5 Click Save.

To view a history of exchange rates

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.

- 3 In the Currency Definition section, click the Exchange Rates link.
On the Exchange Rate Edit page, the latest exchange rates appear for different currencies.
- 4 To see the history of exchange rates for a single currency, click the Exchange Rate History link.
A history of the exchange rates appears.

Reviewing Audit Trail Changes with the Master Audit Trail

You can review the audit trail changes that users made to auditable fields for all auditable record types. An audit trail also indicates if auditable record types are created, deleted, or restored.

For new customers and those upgrading Oracle CRM On Demand to this release, if you are auditing specific fields for record types, auditing of record creation, deletion and restoration is enabled by default. If you are not auditing specific fields for record types, all auditing of record creation, deletion, and restoration is disabled. Then customers can change the record level audit settings.

Before you begin. To perform this procedure, your role must include the Access Master Audit Trail privilege.

To review audit trail changes with the Master Audit Trail

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Audit section, click the Master Audit Trail link.

The Master Audit Trail displays the following values:

- **ID#.** The table row ID.
- **Title.** The name field of the object.
- **Record Type.** The record type being audited.
- **Date.** The date when the object was last audited.
- **Last Name.** The user's last name.
- **First Name.** The user's first name.
- **Field Modified.** The field modified in the object.
- **Old Value.** The previous value of the record.
- **New Value.** The new value of the field. If you change the service request priority field from Low to High, then the Old Value field remains as Low, and the New Value field is High. If you delete a record, the Old Value field remains blank, and the New Value field changes to Record Deleted.
- **Date & Time Updated.** The time and date when the record was updated.
- **Additional Information.** Any supplementary information regarding the modification of the record.

For more information about the audit trail, see [Customizing the Audit Trail](#) (on page 1069).

About Service Allotments

You can view all of the service allotments for your company to see the current and historical usage and to enable alerts when allotments reach the defined threshold values. Customer Care sets the service allotment values for your company. The service allotments are as follows:

- **Web Services Operations Allotment.** Determines the number of Web services operations that a company can perform within a 24-hour period.
- **Web Services Bandwidth Allotment.** Determines the total size in MB of incoming and outgoing messages that can be used by a company within a 24 hour period.
- **Web Services Concurrent Request Allotment.** Determines the maximum number of concurrent Web service requests that a company can process.
- **CRM Desktop Licenses.** Indicates the number of CRM Desktop users licensed by your company.
- **File Allotment.** Determines the file allotment for the company, which is the amount of storage available for files attached to records.
- **Record Allotment.** Determines the record allotment for the company, which is the number of records of all types.

NOTE: The names and descriptions of service allotments are displayed in your active language.

In the Service Allotment List page, you can see the defined allotment value, the current usage, and the remaining usage values. You can drill down on a service allotment to set an alert for the service allotment. When you enable an alert, you define a threshold value on a service allotment, which causes an email warning to be sent to the specified recipients when the threshold is reached.

In the Allotment Usage List page, you can track your company's usage against service allotments over time. You can view, daily, weekly, or monthly usage, although this view varies with the allotment type. You can export the allotment data and allotment usage data for a company, using the Export Assistant. For information about using the Export Assistant, see [Exporting Your Data](#) (on page 1454).

What Happens When Allotments Are Fully Used?

When usage reaches the total company limit for Web services allotments, further requests to Oracle CRM On Demand Web services are not processed. Allotment capacity is released hourly, and the amount of capacity released varies depending on past usage. New requests will be processed when the current usage for the preceding 24-hour period has fallen below the allotment value for your company.

To avoid reaching the total company allotment:

- Optimize Web service clients to avoid unnecessary requests. For more information, see the Oracle Web Services On Demand Guide.
- For the Web Services Bandwidth Allotment, avoid making unnecessary requests that include attachments.

When usage reaches the total company limit for the Record allotment, the following can no longer interact with the Oracle CRM On Demand application:

- Web services that are attempting Insert, Update, or InsertOrUpdate operations on records

- Imports using the Import Assistant or Oracle Data Loader On Demand
- Desktop clients, such as Oracle PIM Sync On Demand, Oracle Outlook Email Integration On Demand, and Oracle Notes Email Integration On Demand

To avoid reaching the total company allotment, users can delete any records from the application that are no longer necessary. When usage reaches the total company limit for the file allotment, users can no longer upload attachments using the following:

- The Oracle CRM On Demand application
- Web services
- Any desktop clients

To avoid reaching the total company allotment, users can delete any attachments that are no longer necessary. For all allotments, users can contact their sales representative and purchase additional capacity, additional licenses, or both. For further assistance, contact Customer Care.

Viewing Service Allotment Usage for Your Company

You can view the following data for each service allotment for your company:

- The allotment name
- The allotment type
- The allotment units
- The value set for the allotment by Customer Care
- The amount of the allotment currently used
- The amount of the allotment remaining
- Whether an alert is enabled for the allotment. If the current usage exceeds the threshold value, an email alert is sent to the defined recipients.
- The user who last modified the allotment data

From the Service Allotment List Page, you can drill down on a service allotment to see more information about the allotment, for example, a description of the allotment, and current usage data in the Allotment Usages applet.

On the Allotment Usage List page, you can see the historical usage data about an allotment. For more information, see [Viewing Historical Service Allotment Usage](#) (on page 1027).

You can click Edit on the Service Allotment List page and then set an alert for an allotment. For more information, see [Setting Alerts for Service Allotments](#) (on page 1027).

To view your company's service allotment usage

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.

- 3 In the Service Allotment Administration section, click the Service Allotment Administration link.
- 4 In the Service Allotment List page, view the service allotment data for your company.

Viewing Historical Service Allotment Usage

From the Allotment Usage List page, you can review historical usage data about the allotments for your company. By default, the allotment usages are listed by date, and the period, allotment type, allotment name, allotment units, allotment used, and created date are displayed. You can view allotment usages for daily, weekly, or monthly periods, although this view varies with the allotment type.

The following table describes what you can do from the Allotment Usage List page.

To do this	Follow these steps
Create a new list of allotment usages	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in Creating and Refining Lists (on page 73).
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists (on page 81).
Manage allotment usages lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page (on page 79).
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in Creating and Refining Lists (on page 73).
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page (on page 80).
Sort the allotment usages in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records that you want to see at one time.

Setting Alerts for Service Allotments

You can set an alert for a service allotment so that when the allotment usage reaches a certain threshold value, an email is sent to notify specified users. If alerts are enabled for a service allotment, the following defaults apply:

- **Alert Recipients.** The email address of the primary contact for the company
- **Alert Threshold.** Seventy percent of the allotment value

For existing customers, alerts are disabled by default. For new customers, alerts are enabled by default.

Note: You cannot set an alert for the Web Services Concurrent Request allotment.

In addition to the threshold alert, an automatic alert email is sent to either the primary contact or the specified email recipients when current usage reaches a company's allotment value. If alerts are enabled, then the email indicating that the allotment has been reached is sent to the specified recipients.

To set an alert for a service allotment

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Service Allotment Administration section, click the Service Allotment Administration link.
- 4 In the Service Allotment List page, click Edit.
- 5 In the Service Allotment Edit page, complete the following fields:
 - **Alert Recipient.** Enter the email addresses of the users who will receive a warning email.
 - **Alert Threshold.** Enter the percentage of the allotment value at which the alert email will be sent.
 - **Alert Enabled.** Select this check box to enable the sending of alert emails.

Viewing File and Record Utilization Information

At intervals, Oracle CRM On Demand takes a snapshot of the amount of file and record storage that your company is using. The information is kept for 90 days, after which it is purged from the database. To help you to keep track of the amount of file and record storage that your company uses, you can view details about the following:

- The number of file attachments that were stored when the snapshot was taken
- The amount of file storage that was used by your company when the snapshot was taken
- The number of records that existed for your company when the snapshot was taken

NOTE: Files and records that were deleted but not purged from Oracle CRM On Demand are not included in the calculation of file and record utilization.

The following procedure describes how to view file utilization information.

To view file utilization information

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.

- 3 In the Service Allotment Administration section, click File Utilization to open the File Utilization List page.

By default, the File Utilization List page displays the Current File Usage list. The Current File Usage list shows the information from the most recent snapshot. If you want to view the information from all of the snapshots taken over the last 90 days, select the All File Usage list in the title bar of the list page.

The following table describes the information shown on the File Utilization List page.

Column Name	Description
Record Name	The name of the record type as it appears in the user interface. If your company customized the name of the record type, the customized record type name appears in this column. NOTE: If no files were attached to the records of a given record type for your company when the snapshot was taken, then the record type is not listed.
Number of Files	The number of files that were attached to the records of the listed record type for your company in Oracle CRM On Demand when the snapshot was taken.
File Allotment Used (MB)	The amount, in megabytes, of file storage used by your company in Oracle CRM On Demand to store file attachments for records of the listed record type when the snapshot was taken.
Date	The date and time of the snapshot.

The following procedure describes how to view record utilization information.

To view record utilization information

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Service Allotment Administration section, click Record Utilization to open the Record Utilization List page.

By default, the Record Utilization List page displays the Current Record Usage list. The Current Record Usage list shows the information from the most recent snapshot. If you want to view the information from all of the snapshots taken over the last 90 days, select the All Record Usage list in the title bar of the list page.

The following table describes the information shown in the Record Utilization List page.

Column Name	Description
Record Name	The name of the record type as it appears in the user interface. If your company customized the name of the record type, the customized record type name appears in this column. NOTE: If no records existed for a given record type for your company when the snapshot was taken, then the record type is not listed.

Column Name	Description
Record Allotment Used	The number of records of the listed record type that existed for your company in Oracle CRM On Demand when the snapshot was taken.
Date	The date and time of the snapshot.

TIP: For information about using the menu options on the File Utilization List page and the Record Utilization List page, see [Working with Lists](#) (on page 69).

Application Customization

Your company probably has specific requirements for how data is gathered and recorded, what terminology is used, and how information needs to be presented so that employees have what they need to be productive. Application customization lets you customize Oracle CRM On Demand to meet your company requirements, including page layout, field management, and list access requirements.

The following examples illustrate some ways in which you can customize the application:

Example 1: You might want all of your sales representatives to include an email address on all of their contact records. The best way to make sure that this requirement is met is to make the Email field a required field. Then, anyone who creates a new contact record cannot save it unless it includes an email address.

Example 2: You have two groups of employees that each need to track different information on an account page. You can meet this requirement by creating a different account page layout for each group and providing the appropriate access through role assignment.

The Application Customization page has two sections:

- **Record Type Setup.** Contains links for each of the top-level record types. When you click a link, you are taken to a record-type-specific customization page. Depending on your company setup, industry-specific record types might not be visible within Oracle CRM On Demand. Also, industry-specific records might require customization according to your company's specific needs. For more information on the tasks that you can perform from the individual application customization pages, see [Record Type Application Customization Page](#) (on page 1031).
- **Application Setup.** Contains links to various customization functions that are not specific to a record type. Click a topic to see step-by-step instructions for the procedures available from the Application Setup section:
 - [Displaying External Web Pages in Tabs](#) (on page 1077)
 - [Creating and Managing Action Bar Layouts](#) (on page 1085)
 - [Creating Custom Web Applets](#) (on page 1080)
 - [Creating Global Web Applets](#) (on page 1086)
 - [Uploading Client Side Extensions](#) (on page 1089)
 - [Customizing My Homepage for Your Company](#) (on page 1092)
 - [Enabling Custom Reports in My Homepage](#) (on page 1096)
 - [Renaming Record Types](#) (on page 1097) and [Adding Record Types](#) (on page 1099)
 - [Changing the Icon for a Record Type](#) (on page 1099)

NOTE: For the My Homepage Layout and My Homepage Custom Report functions, your role must include the Administer Homepage Customization privilege.

Before you begin:

- To perform the application customization procedures, your role must include the Customize Application privilege.
- Make sure you understand your business needs:
 - Talk with your business owners to understand their business processes and needs for the application.
 - Determine the fields, display names, values for picklists, and other custom fields required to support their needs.
 - Determine how the fields should be laid out on the interface and what fields must be marked as required.
 - Use the Field Setup and Page Layout templates, available in the Tools and Templates area of the Training and Support Center, to help you document your application customization requirements.

Record Type Application Customization Page

For each record type there is an Application Customization page with links for customization tasks that you can perform for that record type.

The following table describes each of the possible sections on an Application Customization page, and lists the tasks that you can perform when you click the links in that section. The sections displayed depend on the record type and some sections are visible only if your role includes a particular privilege. For all customization procedures, the Customize Application privilege is required.

Note: In the topics referenced in the following table, a placeholder for the name of a record type is indicated by the words, *record type*, in italics. For example, if you are working on accounts, replace *record type* with *account* in the following text: click the *record type* Field Audit Setup link.

Section	Tasks	Additional Privilege Required
Field Management	Renaming fields, creating custom fields, managing picklist values, specifying default values for a field, setting up field validation, and selecting whether a field can be copied or not. For more information about these tasks, see: About Field Management (on page 1033) About Custom Fields (on page 1039) Creating and Editing Fields (on page 1043) Administering the Copy Enabled Setting (on page 1046) Renaming Fields (on page 1050) Using Indexed Custom Fields (on page	None

Section	Tasks	Additional Privilege Required
	<p>1051)</p> <p>Changing Picklist Values (on page 1054)</p> <p>Reverting Settings to Defaults (on page 1054)</p>	
	Advanced defining of default fields and field validation	Advanced Field Management
Page Layout Management	<p>Creating and managing static page layouts. For more information about these tasks, see:</p> <p>Customizing Static Page Layouts (on page 1057)</p> <p>Customizing Related Item Layouts (on page 1056)</p> <p>Renaming Field Section Titles (on page 1060)</p> <p>Creating and managing Web applets that can be used on Detail page layouts; see:</p> <p>Creating Web Applets (on page 1061)</p> <p>For information about advanced page layout management, see Specifying Dynamic Page Layouts (on page 1072).</p>	None
Cascading Picklists	<p>Defining and managing cascading picklists. For more information about these tasks, see:</p> <p>Defining Cascading Picklists (on page 1063)</p>	None
Search Layout Management	<p>Specifying targeted search fields and managing layouts for search results. For more information about these tasks, see:</p> <p>Managing Search Layouts (on page 1064)</p>	None
List Access and Order	<p>Managing default list access and the display order for each role. For more information about these tasks, see:</p> <p>Managing List Access and List Order (on page 1066)</p>	None

Section	Tasks	Additional Privilege Required
Homepage Layout Management	<p>Creating and managing Homepage layouts and specifying custom reports to be displayed on the Homepages. For more information about these tasks, see:</p> <p>Creating Record Homepage Layouts (on page 1068)</p> <p>Creating Homepage Custom Reports (on page 1066)</p>	Customize Application – Manage Homepage Customization
Custom Audit Trail	<p>Customizing the field audit trail for your company. For more information about these tasks, see:</p> <p>Customizing the Audit Trail (on page 1069)</p>	<p>Administer Field Audit</p> <p>This feature is available only for certain record types.</p>
Dynamic Layout Management	<p>Creating and managing dynamic page layouts. For more information about these tasks, see:</p> <p>Specifying Dynamic Page Layouts (on page 1072)</p>	Customize Application - Manage Dynamic Layouts
Lookup Window Setup	<p>Managing the behavior of the Lookup Windows used with smart associations. For more information about these tasks, see:</p> <p>Managing the Behavior of Lookup Windows (on page 1075)</p>	None

For some record types, the Field Management and Page Layout sections contain links for that record type and also links for the related record type. For example, the Account Application Customization page contains links for the following:

- Account Field Setup
- Account Contact Field Setup
- Account Partner Field Setup
- Account Relationship Field Setup
- Account Team Field Setup

About Field Management

In Oracle CRM On Demand you can perform the following field management tasks for the different record types:

- [Creating and Editing Fields](#) (on page 1043)
- [Renaming Fields](#) (on page 1050)
- [Changing Picklist Values](#) (on page 1054)

When you create custom fields or edit field definitions, you can specify default values for the field that take effect when new records are created. You can also specify that field validation is performed for the field to ensure that it has a particular value.

About Copying Fields

Most record types in Oracle CRM On Demand have a copy function; that is, users can copy the current record they are using. When a user clicks the Copy button on the Record Detail page, it opens a new record page. This new Record Page contains all the fields that can be copied. A user can change and save these fields.

NOTE: When you use the Copy button, only the base record is copied, but not the related item for child records.

The following restrictions apply when using the copy function:

- Web links, system fields, address fields, calculated and reference fields cannot be copied. The Copy Enabled check box is unavailable for these items.
- Read-only fields cannot be copied. Read-only fields are fields that are set as read-only in the field setup or in fields layout.
- Fields that are unavailable on a user's form layout cannot be copied.
- The following attachment fields cannot be copied:
 - Attachment
 - Attachment: File Name
 - Attachment: Size (In Bytes)

You can copy fields by using the Copy button in record detail pages in Oracle CRM On Demand. You can enable this setting by using the Copy Enabled check box in the Field Management page of the Application Customization section of Oracle CRM On Demand. For more information on specifying which fields can be copied in Oracle CRM On Demand, see [Administering the Copy Enabled Setting](#) (on page 1046).

About Field Validation

When you create custom fields or edit field definitions, you can specify in the Field Edit page that fields are required or read-only. You can also specify predefault or postdefault values on new records.

Required Fields

There are various situations where you might define fields as required. For example, your company might require that every service request must track information on the cause of a service request. In this case, you specify that the Cause field for service requests is required. Then, when a record is created or updated, and saved, the application validates that the Cause field is NOT NULL.

As another example, your company might have a business policy that if an opportunity is lost, which had an expected revenue of \$100,000 or greater, the reasons for losing must be tracked. In this case, you define the

Reason field on Opportunity as required only when the Revenue field has a value greater than 100,000. When an Opportunity record is saved, the application validates that the Request field's value is greater than 100,000.

If a validation fails, an error message is displayed, warning users to enter a value for the required field before saving the record. You can also specify a custom error message (in the Field Validation Error Message field) to be displayed if the validation fails.

When you specify a field as Required, the validation is enforced through all interfaces, including the user interface, Web Services, and data import.

The fields specified as required in the Field Edit page, are required fields for all users, regardless of their role. If you need to make a field required only for a specific role, you can do so by editing the appropriate page layout for fields that are not already required fields. For more information, about editing page layouts, see [Customizing Static Page Layouts](#) (on page 1057).

Read-Only Fields

The following are situations in which you might define fields as read-only:

- **Fields from external sources.** If your company tracks, for example, the credit rating of an account in an external system, it is likely that you want the credit rating to be updated regularly through a nightly import, but only want the field to be read-only in the UI.
- **Moving an existing field to a custom indexed field.** If you want to use one of the index custom fields for an existing custom field, you can specify that users can have read-only access only to the old field while you move data to the new index field. This field definition avoids data becoming out of sync.

Custom Field Validation Rules

You can use Oracle On Demand Expression Builder (Expression Builder) to create expressions for custom field validation rules. You can click the *fx* icon next to the Field Validation field to open the Expression Builder window in which you can enter an expression. For information about the syntax you can use for expressions, see [Expression Builder](#) (on page 1486).

The following are situations in which you might define custom field validation rules:

- **Enforcing business policy.** For example, if your company has a business policy that an MDF cannot be effective for more than one year, you can define a validation rule on an End Date field to ensure that the field value is never more than one year from the Start Date.
- **Enforcing data format.** For example, if your company uses a value-added tax (VAT) number on a European account, you can specify that validation of the correct VAT format, based on an account's billing address. As another example, you might specify that the value for a specific custom field is no more or no less than four digits long.

The following circumstances prevent a field validation expression from being evaluated:

- A field is left blank when the record is created. Field validation does not force a value to be required.
- A field has a pre-existing invalid value, and it is not changed when it is updated.

If a validation expression is not evaluated, or if a validation expression evaluates to NULL, no error message is generated. An error message is generated only when the validation expression fails (that is, the expression evaluates to FALSE).

Field validation expressions assume that the first parameter is the field name itself. If, for example, you are putting a simple field validation expression on an Amount field to specify that the value must be greater than 1000, it is sufficient to enter >1000. You do not need to enter [<Amount>]>1000. For more information on more complicated expressions, see [About Expressions](#) (on page 1489).

Restrictions on Specifying Field Validation Rules

You cannot specify field validation rules for these types of fields:

- System fields
- Internal calculated fields
- RowID and ID fields

NOTE: Remember that Row_ID is an internal system field. Depending on the operation transitions, for example, during record creation, it is not always guaranteed to remain static. It can differ to ExternalSystemID or the IntegrationID.

- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code.
- Web links
- The following attachment fields:
 - Attachment
 - Attachment: File Name
 - Attachment: Size (In Bytes)

About Defining Default Field Values

You can specify default values for fields in the Default Value field in the Field Edit page when you create custom fields or edit field definitions.

Specifying a default value for a field is useful where you require:

- A constant value for a field. For example, you might want an Account Type field to have a default value of Customer when a new record is created.
- A formula-based value as default. For example, you might want the default value for a Due Date field of Fund Requests to take a default value of 6 months after the value of the Create Date field.
- The generation of a unique value for a field. For example, you might want to specify an expression to generate a unique number as an ID for an Expense Report field. (This field is also read-only.)
- A role-specific default value. For example, in a company where the majority of the service requests (SR) are created by customer service representatives (CSR), a Reassign flag field might be checked by default so that, if, for example, a sales representative opens the SR, it is routed to the correct CSR based on pre-defined assignment rules.

NOTE: Most of these are possible only if your role includes the Advanced Field Management privilege.

There are two types of default values for fields:

- **Pre Default.** The field is prepopulated with the specified value when a user creates a new record. Users can overwrite the default value or accept the default value.
- **Post Default.** The field is not prepopulated with the specified value when a user creates a new record, but the field takes the specified default value when the record is saved, if:
 - The user leaves the field blank,
 - The field is hidden from the layout
 - A value has not been supplied by the integration tools

Pre Default is the default type of value for fields. You can specify Post Default by selecting the check box of that name in the Field Edit page.

NOTE: Post Default field values are not supported in the Offline client, and display as blank fields.

Default field values are applicable to new records only, and not applicable to record updates.

If you specify a default value for a field that already has a system-specified default, your value takes precedence for your company. An exception to this rule is the Revenue field on Opportunity records. Any default or post default values you specify for this field are ignored, because the field is used in the generation of forecasts based on opportunity revenue.

You cannot set default values for these types of fields:

- System fields
- Internal calculated fields
- RowID and ID fields

NOTE: Remember that Row_ID is an internal system field. Depending on the operation transitions, for example, during record creation, it is not always guaranteed to remain static. It can differ to ExternalSystemID or the IntegrationID.

- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code
- Web links
- Check boxes (Post Default values)
- The following attachment fields:
 - Attachment
 - Attachment: File Name
 - Attachment: Size (In Bytes)

The following table shows the default values that you can specify for the different field types in Oracle CRM On Demand.

Field Type	Valid Default Values
------------	----------------------

Field Type	Valid Default Values
Check box	<p>Y if the checkbox should be checked and the Boolean value is true.</p> <p>N if the checkbox should be unchecked and the Boolean value is false.</p> <p>Blank represents an undefined value for a checkbox even though it appears unchecked</p> <p>Note: You cannot select Post Default for a check box field.</p>
Currency	A valid numeric value between -2147483648 and 2147483647.
Date	Today + <i>number</i> , where <i>number</i> represents a specific number of days. The default date is calculated as today's date plus the number entered. For example, if today is 1 January 2008, and you enter Today + 7, the default value is set to 8 January 2008.
Date/Time	As for the Date field type, but in addition the time when the new record is opened is also shown.
Integer	A valid numeric value between -2147483648 and 2147483647.
Multi-select picklist	You cannot define a default value for a multi-select picklist.
Note	A text value up to 16350 characters.
Number	A valid numeric value between -2147483648 and 2147483647.
Percent	A valid numeric value between -2147483648 and 2147483647.
Phone	A valid telephone number.
Picklist	The picklist value selected will be the default value for the field.
Text (Long)	A text value up to 255 characters.
Text (Short)	A text value up to 40 characters.
Web link	<p>A valid URL. Expressions and validation is not allowed. A default value can be set through the Web Link edit page.</p> <p>The Display Text field can contain up to 250 characters. The URL field can contain up to 8000 characters. Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length changes if you are using parameter substitution.</p>

NOTE: If you create an expression to set a default value, the result of the expression must not exceed the maximum number of characters allowed in the field. In addition, any string or numeric literal passed to a function in Expression Builder must not exceed 75 characters. For more information about using Expression Builder, see [Expression Builder](#) (on page 1486).

In addition:

- For all field types, including picklists, you can enter a constant value. For example:

Status (Task) = 'Not Started'

- For Date fields you can specify a number of days from today's date. For example:

Due Date (Fund Request) = Today() + 180

- For an Owner field you can specify a <record creator> (variable) or a specific user.

No lookup is supported, You must type directly in the field.

You can also create complex expressions for default field values. You can enter an expression directly in the Default Value field, or click the *fx* icon to open the Expression Builder window, where you can enter an expression. For information about the syntax you can use for expressions, see [Expression Builder](#) (on page 1486).

To use Expression Builder in field management, you must have the Advanced Field Management privilege in your user role. Users who have the Administrator role can enable this privilege for their own role and for other roles.

About Custom Fields

Oracle CRM On Demand supplies the default fields that most organizations require. However, you might find fields in your existing records that do not have the corresponding fields in the records in Oracle CRM On Demand. In this case, you can create new fields, called *custom fields*, to support the unique needs of your company. This need might arise when you have existing records that you want to import into Oracle CRM On Demand.

Custom fields:

- Can be used in assignment rules, reports, filtered lists, and targeted search
- NOTE:** For performance reasons, some custom fields cannot be used to sort lists.
- Cannot be deleted
- Cannot be viewed until they are explicitly added to custom page layouts
- Are not inherited from one record type to another

For example, a custom field you added for leads is not automatically carried over to opportunities when that lead is converted to an opportunity.

Custom fields for lead records must be mapped if you want them to transfer when a lead is converted to an opportunity, account, or contact.

- Cannot be viewed by other users until they sign in again
- Can be referenced by Web links, Web services, and other integration technologies

The following table shows you how many new fields you can add to Oracle CRM On Demand. The data pertains to available fields for most record types; that is, you can add 100 new picklist fields for accounts, 100 for contacts, 100 for opportunities, and so on. The maximum number of values (active or disabled) in a picklist is 1000.

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Account	35	80	25	25	35	10

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Contact	35	25	25	25	35	10
Lead	35	25	25	25	35	10
Opportunity	35	25	25	25	35	10
Activity	35	25	25	25	35	10
Campaign	35	25	25	25	35	0
Solution	35	25	25	25	35	0
MedEd	35	25	25	25	35	0
Household	35	25	25	25	35	0
Funds	35	25	25	25	35	0
Portfolio	35	25	25	25	35	0
Vehicle	70	50	60	50	70	0
Service Request	35	25	25	25	35	10
Program	35	35	25	25	35	0
Custom Object 01	35	25	35	25	35	10
Custom Object 02	35	25	35	25	35	10
Custom Object 03	35	25	35	25	35	0
Dealer	70	105	60	50	70	0
Product	35	25	25	25	35	0
Asset	35	25	25	25	35	0
Fund Request	35	25	25	25	35	0
MDF Request	35	25	35	25	35	0
Program Partner	70	50	60	50	70	10
Revenue	35	25	25	25	35	0
SP Request	35	25	35	25	35	0
User	35	25	35	25	35	0
Deal Registration	35	25	35	25	35	0

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Deal Registration Revenue Products	35	25	35	25	35	0
Course	35	25	35	25	35	0
Exam	35	25	35	25	35	0
Certification	35	25	35	25	35	0
Accreditation	35	25	35	25	35	0
Custom Objects 04 and higher	35	25	25	35	35	0
Industry-specific record types other than those listed in this table	35	25	25	35	35	0

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link
Account	33	30	10	100	30	45	100
Contact	33	30	10	100	30	70	100
Lead	33	30	10	100	30	45	100
Opportunity	33	30	10	100	30	70	100
Activity	33	30	10	100	30	45	100
Campaign	33	30	10	100	30	45	100
Solution	33	30	10	100	30	45	100
MedEd	33	30	10	100	30	45	100
Household	33	30	10	100	30	45	100
Funds	33	30	10	100	30	45	100
MDF Request	35	30	20	100	30	60	100
Portfolio	33	30	10	100	30	45	100
Vehicle	68	60	30	200	60	105	100

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link
Service Request	33	30	10	100	30	45	100
SP Request	35	30	20	100	30	60	100
Program	35	30	10	100	30	45	100
Custom Object 01	35	30	20	100	30	60	100
Custom Object 02	35	30	20	100	30	60	100
Custom Object 03	35	30	20	100	30	60	100
Dealer	68	60	30	200	60	105	100
Product	33	30	10	100	30	45	100
Asset	33	30	10	100	30	45	100
Fund Request	33	30	10	100	30	45	100
Program Partner	68	60	30	200	60	105	100
Revenue	33	30	10	100	30	45	100
User	35	30	20	100	30	60	100
Deal Registration	35	30	20	100	30	60	100
Deal Registration Revenue Products	35	30	20	100	30	60	100
Course	35	30	20	100	30	60	100
Exam	35	30	20	100	30	60	100
Certification	35	30	20	100	30	60	100
Accreditation	35	30	20	100	30	60	100
Custom Objects 04 and higher	35	30	20	100	30	90	100
Industry-specific record types other than those listed in this table	35	30	20	100	30	90	100

Creating and Editing Fields

You can create custom fields and edit existing field definitions in the Field Edit page for a record type.

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

To create custom fields and edit fields

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 In the Field Management section, click *record type* Field Setup.
- 5 On the Fields page:
 - Click New Field if you are creating a custom field.
 - Click the Edit link for the field to edit the field's definition.

NOTE: If you have edited a standard field and want to reset all edited values to the default settings, click the Default button located beside the Save and Cancel buttons.

- 6 On the Field Edit page, enter a Display Name.
The display name is the label for the field.
- 7 On the Field Edit page, select a Field Type if you are creating a field.

CAUTION: The Field Type cannot be changed after you save the custom field.

The following rules apply to custom fields, which might differ from those applicable to default fields of the same field type:

Field Type	Maximum Length	Notes
Date	25	
Date/Time	25	
Integer	10	Whole numbers ranging in value from -2147483647 to 2147483647.
Multi-select picklist		You cannot define a default value for a multi-select picklist.
Note	1024	

Field Type	Maximum Length	Notes
Number	10	Numbers ranging in value from - 2147483648 to 2147483647.
Phone	35	
Picklist	30	
Text (Long)	255	Text fields use a single-line text field.
Text (Short)	100	Text fields use a single-line text field. However, different fields use different lengths.
Web Link	n/a	<p>Web Link custom fields allow you to create context-sensitive hyperlinks in your layouts.</p> <p>The Display Text field can contain up to 250 characters. The URL field can contain up to 8000 characters. Browsers have different maximum URL lengths. If you specify a URL that is too long, then it might not work as intended. The URL length changes if you are using parameter substitution.</p>

- 8** In the Additional Properties section, complete the following fields as required:

Field	Comments
Required	Select this check box to make the field a required field when creating or updating records. For example, you can require that all users fill in the Account field when adding new contacts.
Default Value	<p>Enter a value or an expression directly, or click the fx icon to open the Expression Builder window.</p> <p>You can add complex expressions only if your role includes the Advanced Field Management privilege. This field can contain an expression up to a maximum of 1024 characters. If you create an expression to set a default value, then the result of the expression must not exceed the maximum number of characters allowed in the field. In addition, any string or numeric literal passed to a function in Expression Builder must not exceed 75 characters.</p> <p>If you enter the default value directly in this field, the number of characters in the default value must not exceed the maximum number of characters allowed for the field type. For number type fields, the value must be within the range of values for the field.</p> <p>For more information about setting default values, see About Field Management (on page 1033). For information about the syntax that you can use with expressions, see Expression Builder (on page 1486).</p>
Read Only	Select this check box to make the field read-only.

Field	Comments
Copy Enabled	Select this check box to allow this field to be copied when the record type is copied using the Copy Record button on the record detail page.
Post Default	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Select this check box if you require that the field is not automatically filled with the default value when a new record is created. The specified default value is set when the record is saved only if a value is not supplied by the user or by integration tools.</p> <p>Note: You cannot select Post Default for a check box field.</p>
Field Validation	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Enter an expression directly, or, click the <i>fx</i> icon to open the Expression Builder window.</p> <p>This field can contain a maximum of 1024 characters.</p> <p>For more information about field validation, see About Field Management (on page 1033), and for information about the syntax you can use for expressions, see Expression Builder (on page 1486).</p>
Field Validation Error Message	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Enter a custom error message to be displayed in addition to the standard message if validation fails for the field. The message can contain only letters, numbers, spaces, commas, periods, and dashes.</p> <p>The following shows how the error messages are displayed, depending on whether you specify a custom error message:</p> <ul style="list-style-type: none"> ■ If field validation is set, and no custom message specified: The value entered for '<i>Field</i>' does not meet the validation rules set by your company administrator. The validation condition is '<i>Rule</i>' (<i>error code</i>). ■ If field validation is set, and a custom message is specified: [<i>Custom Error Message</i>] (<i>error code</i>).

1 Click Save.

The new fields that you add automatically appear in blue text and brackets in the other activated languages (regardless of the setting of the Mark for Translation check box).

2 To manually enter the translated equivalent of the new name or Field Validation Error Message:

- a** From the Translation Language drop-down list, select the language whose translation you want to enter.

- b** Enter the translated equivalent in the appropriate Display Name or Field Validation Error Message field, and click Save.
- c** Click the link to return to the Fields page you just updated, and select the language again, if necessary.

The translated name appears in black text in the Display Name column.

NOTE: For custom fields to display in Oracle CRM On Demand Answers when the Oracle CRM On Demand user language differs from the language in which the custom field was created, the custom field must be translated in to the applicable language. For example, if a custom field is created in English, a German-language user sees this field in Oracle CRM On Demand Answers only if the field is translated in to German.

Selecting Mark for Translation overwrites both Display Name and Field Validation Error Message in all other languages.

3 If you created a picklist or multi-select picklist:

- a** Click the Edit Picklist link for the custom field.
- b** In the Picklist Values box, enter each value on a separate line.
- c** Save the record.

NOTE: Now you must expose newly-created custom fields, so that they appear on the forms (Edit, Detail and Create forms). They do *not* appear by default. To expose the custom field, create new page layouts as required and make sure that these page layouts are assigned to each role that needs to view the field.

Administering the Copy Enabled Setting

Most record types in Oracle CRM On Demand have a copy function; that is, users can copy the current record that they are using.

NOTE: When you use the Copy Record button, only the base record is copied, but not the related item child records.

The following restrictions apply when using the copy function:

- Web links, system fields, address fields, calculated and reference fields cannot be copied. The Copy Enabled check box is unavailable for these items.
- Read-only fields cannot be copied. Read-only fields are fields that were set as read-only in the field setup or in fields layout.
- Fields that are unavailable on a user's form layout cannot be copied.

This topic describes how to specify which fields you can copy by using the Copy button in record detail pages in Oracle CRM On Demand.

To specify which fields can be copied using the Copy button

- 1** In the upper-right corner of any page, click the Admin global link.

- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the record type for which you want to enable the copy function.
- 4 In the Field Management section, click the setup link for the record type field.
A list of the fields for the specified record type field is displayed.
- 5 Find the field that you want to edit, and click the Edit link.
NOTE: If you want to copy associations, you must select the association picklist, and not the association ID. All fields related to this association are automatically copied when the association picklist is set to Copy Enabled.
- 6 Select the Copy Enabled check box.
- 7 Click Save.

These changes take effect the next time that the user logs in to Oracle CRM On Demand.

Setting Up Custom Field Integration Tags

Integration tags for custom fields are language independent symbolic identifiers that get assigned to every custom field. These tags are used by Web Services (used when generating WSDL files) and Web Link custom field parameters. These tags allow an administrator to set a meaningful integration name for each custom field. This name is used by integration components, so that the label names can be changed without affecting existing integrations. Integration tags are not visible to end users.

Expression Builder uses integration tags. So, they are also used when creating workflow rules and fields. For more information about workflow rules, see [Creating Workflow Rules](#) (on page 1221). For more information about creating and editing fields, see [Creating and Editing Fields](#) (on page 1043).

CAUTION: Do not change integration tags after setting them up. If you do, you risk losing any technologies that reference the integration tags.

To set the integration tag for a custom field

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 In the Field Management section, click *record type* Field Setup.
- 5 On the *record type* Fields page, click Rename Fields.
- 6 On the Rename Fields page, click the Advanced button.
- 7 Update the Integration Tag.

TIP: For the Integration Tag, use a short, descriptive name that easily identifies this custom field. This tag is referenced by Web Services, Web links, and other integration technologies (WSDL files for Web Services and URL Parameters for Web Links).

Setting Up Web Links

A *Web link* is a custom field that allows you to place a hyperlink to an external Web site or Web-based application in a record in Oracle CRM On Demand. You can use a Web link custom field to provide a convenient way for users to navigate to another Web page, including another page in Oracle CRM On Demand. You can create Web link custom fields for any record type. For example, you might define a Web link field for the account record type that updates the account details with values from another application. As with other custom fields, you must add Web Link fields to your record page layouts to make them visible to your users.

You can configure a Web link to simply open another Web site. You can also configure the Web link to pass specific information from the Oracle CRM On Demand record as a parameter in the URL. For example, you might create a Web link field to pass address information from an account record to a Web site that provides address-specific maps. Then, when the user clicks the Web link on the account record, a map for your account location is opened.

You can configure the Web link to appear only in certain circumstances. For example, you can specify the conditions that must be met before the Web link is displayed, and you can configure the link to appear only on the Detail pages to prevent users from clicking the link from the Edit pages.

NOTE: The contents of the Web link fields cannot be carried over to the new records when a lead is converted.

Before you begin. To configure Web Link fields, you must be familiar with the syntax of the target URL.

To set up the Web link

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 In the Field Management section, click *record type* Field Setup.
- 5 If the Web link field does not already exist, create a custom Web link field as described in [Creating and Editing Fields](#) (on page 1043).
- 6 On the Fields page, click the Edit Web Link link for the custom field.
- 7 On the Edit Web Link page, fill in the Window Properties:
 - a For Display Text, enter the label (display name) for the hyperlink, which the user sees in the layout. Example: Click Here for Stock Ticker (underlined).

You can also include context-sensitive parameters in the Display Text field by placing the cursor in the Display Text field, and then selecting the User Fields or (Record Type) Fields list. A field parameter is placed in the Display Text field (designated by %%%fieldname%%%), which is replaced by the field value based on the current record.

NOTE: If your display text is too long to fit in the layout, it will be concatenated. Also, the information for any variables is added at run time.

- b** Select how you want Oracle CRM On Demand to behave when a user clicks the hyperlink:
 - **Open in Current window.** Opens the hyperlinked page in the current window, replacing the current Oracle CRM On Demand session.
 - **Open in Custom Web Tab.** Opens the hyperlinked page in a custom Web tab. Select the required Web tab from the Target Custom Web Tab list.
 - **Open in New window.** Opens the hyperlinked page in a new window, leaving the current Oracle CRM On Demand window unchanged. Select the Parent Window Refresh check box if you want to refresh the parent window after the user closes the new window.
- c** For Display Options, select Detail Page, Edit Page, or Both, depending on whether you want the Web link to appear on Detail pages only, Edit pages only, or both Detail and Edit pages.

8 Fill in the Link Properties:

- a** For Active Link Condition, enter an expression for a condition that controls whether the Web link is active on the Detail and Edit pages. You can click the fx icon next to the Active Link Condition field to open the Expression Builder window in which you can enter an expression. For information about the syntax that you can use for expressions, see [Expression Builder](#) (on page 1486).

For example, if you enter an expression like [Revenue] > 10000, the Web link is active only if the condition, Revenue value greater than 10000, is met.

If you do not enter an expression, the Web link is always active. If you enter an expression, and the condition is not met, the Web link is still displayed, but it is not active.

- b** For Display Link Condition, enter an expression for a condition that controls whether the Web link is visible on the Detail and Edit pages.

For example, if you enter an expression like [Revenue] > 10000, the Web link is displayed only if the condition, Revenue value greater than 10000, is met.

If you do not enter an expression, the Web link is always displayed.

The following applies to the expressions in the Display Link Condition, and Active Link Condition fields.

- **New page.** The visible and active expressions are not evaluated for new pages. They are set to TRUE by default. The only way to disable the link is to make the expression explicitly FALSE.
- **Edit page.** The visible and active expressions are set to TRUE by default. However, you can use the Expression Builder to add a new expression.
- c** For Url, enter the URL that is invoked when the user clicks the hyperlink, such as www.oracle.com.

NOTE: You can also include context-sensitive parameters by placing the cursor in the URL field, and then selecting the User Fields or (Record Type) Fields list. A field parameter is placed in the URL (designated by %%%fieldname%%%), which is replaced by the field value based on the current record when the user clicks the value.

If you do not specify any URL, the user is directed to a void URL when clicking the link.

NOTE: Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser when they click the Web link.

- 9 For User fields, select an option from the User Fields list to add user parameter fields to the URL field or Display Text field at the current position of the cursor.

For example, if you choose User id from the list, %%%User id%% is inserted into either the URL or the Display Text, depending on where your cursor is positioned. At run time, this parameter is replaced with the user ID of the user who is logged in.

- 10 For *record type* fields, place your cursor in the URL or Display Text field where you want to add a parameter, and then select the field that you want to include from the list.

For example, if you select the field Row id, %%%Row id%% is inserted into either the URL or the Display Text, depending on where your cursor is positioned. At run time, this parameter is replaced with the row ID of the current record.

NOTE: A placeholder for the name of a record type is indicated by the words, *record type*, in italics. For example, *record type* refers to the record type where you add the Web link custom field. For example, if you are editing a Web link for a contact record, this field appears as the Contacts Fields list.

- 11 Click Save.

- 12 Add the Web link field to the *record type* page layout, as described in [Customizing Static Page Layouts](#) (on page 1057).

About Using Web Links to Create New Integration Scenarios

Adding Web link custom fields to Oracle CRM On Demand provides many new integration opportunities. You can create an integration, based on the user interface, to on premise and external systems that allow users to navigate directly to content from Oracle CRM On Demand.

Some examples include:

- Create a link to a financial Web site based on the account ticker symbol that brings up a stock chart for the account.
- Create a link to an internal system that uses Web Services and creates a composite view of data from multiple on premise and hosted solutions relevant to the current account.

For step-by-step instructions on how to create Web links, see [Setting Up Web Links](#) (on page 1048).

Renaming Fields

To use terminology that is familiar to your employees, you can change field names. For example, you can change the Account Name field label to Company Name.

NOTE: It can take 30-60 minutes for the new field display names to appear in reports and analytics.

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

To rename a field

- 1 In the upper right corner of any page, click the Admin global link.

- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field Management section, click the required Field Setup link.
- 5 In the *record type* Fields page, Click Rename Fields.
- 6 In the Display Name column, edit the Name for the field.
- 7 (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

Selecting the Mark for Translation check box also causes the Field Validation Error Message (from the Field Edit page) to be marked for translation if the error message exists. The Field Validation Error Message field is visible only for users whose role includes the Advanced Field Management privilege.

- 8 To manually enter the translated equivalent of the new name:
 - a From the Translation Language drop-down list, select the language whose translation you want to enter.
 - b Enter the translated equivalent in the appropriate Display Name field and click Save.
 - c Click the link to return to the Fields page you just updated and select the language again, if necessary.
The translated name appears in black text in the Display Name column.
- 9 Click Save.

Using Indexed Custom Fields

To optimize the performance of Oracle CRM On Demand, you can use custom fields that have been optimized for specific record types. These optimized fields, which are called *indexed custom fields*, are special fields that improve the response time during a search or when sorting a particular list. Indexed custom fields are preconfigured in the Oracle CRM On Demand database. You can change the labels on the indexed custom fields, but you cannot change the integration tags.

NOTE: You can choose to migrate your data from a custom field to an indexed custom field to increase the performance of lists for users. To migrate the existing data to the available record types, use the export and import functionality of Oracle CRM On Demand or Web services. For more information about exporting and importing data, see [Import and Export Tools](#) (on page 1282). For more information about Web services, see [Web Services Integration](#) (on page 1457).

Indexed custom fields are prefixed with the word, *Indexed*, by default. The following record types do not support indexed custom fields:

- Assessment
- Book
- User

The following table lists the record types that support indexed custom fields:

Record Types Supporting Custom Fields	
Activity	Product
Household	Partner Program
Fund Request	Fund
User	Vehicle Service History
Vehicle Contact	Vehicle Sales History
Vehicle	Custom Objects 1-3
Campaign Recipient	Vehicle
Dealer	Product Category
Asset	Note
Appointment User	Appointment Contact
Task User	Task Contact
Appointment, Task, and Call	Solution
Service Request	Lead
Campaign	MedEd Event
Opportunity Contact Role	Opportunity Product Revenue
Opportunity	Product
Custom Objects 1-3	Contact Team
Contact	Campaign
Call Promotional Items Dropped	Call Product Detail
Account Team	Account
Contact Best Times	

Each record type in the table has the following indexed custom fields:

- Indexed Checkbox
- Indexed Currency
- Indexed Date
- Indexed Number

- Indexed Picklist 1
- Indexed Picklist 2
- Indexed Picklist 3
- Indexed Picklist 4
- Indexed Picklist 5
- Indexed Picklist 6
- Indexed Long Text
- Indexed Short Text 1
- Indexed Short Text 2

All other record types in Oracle CRM On Demand have the following indexed custom fields:

- Indexed Number
- Indexed Date
- Indexed Checkbox
- Indexed Currency
- Indexed Picklist 1
- Indexed Picklist 2
- Indexed Picklist 3
- Indexed Picklist 4
- Indexed Picklist 5

Exceptions: For all Custom Objects, some fields use different naming conventions to those listed in the previous tables:

- Index Picklist 6 = Type
- Index Short Text 1 = Quick Search 1
- Index Short Text 2 = Quick Search 2
- Index Long Text = Name

To use indexed custom fields

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Types Setup section, click the link for the required record type.
- 4** In the Field Management section, click *record type* Field Setup.
- 5** In the *record type* Field page, click Rename Fields and rename the indexed custom fields as appropriate for your company, see [Renaming Fields](#) (on page 1050).

Reverting Settings to Defaults

You can revert all relabeled field names to their original names. (The default option does not affect custom fields or picklist values you added—they do not revert to their default values.)

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

To revert settings to their defaults

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field Management section, click the required Field Setup link.
- 5 In the *record type* Fields page, click the Rename Fields button.
- 6 Click the Default button.

Changing Picklist Values

Some fields give users a drop-down list of predefined values from which they must choose. This list of values is called a *picklist*. For example, the values in the Area field picklist for service requests might be Product, Installation, Maintenance, and Training.

You can add, edit, and reorder values to the picklists for fields. Picklists must contain at least one value, but the maximum number of values (active or disabled) in a picklist is 1000.

The system does not allow you to change picklist values used for forecasting and report metrics. However, it does allow you to change other picklist values used as the basis for standard lists that appear in other areas of the application. For those standard lists, the application still includes the records meeting the criteria, regardless of the picklist values you renamed. For more information, see [About Fields, Picklists, and Metrics](#) (on page 1102).

After you create a new picklist, an initial value called *<No Values>* is automatically available in the picklist. This value is used to communicate to users that values do not yet exist in the picklist, in the case where the field is added to a page layout before real values are added to list. The default *<No Values>* option disappears from the picklist as soon as a custom value is added to a picklist.

CAUTION: Do not use the default *<No Values>* value as part of any new picklist or cascading picklist. Using the value in this way can lead to errors within Oracle CRM On Demand. If you want to continue to have a *<No Values>* option available in a picklist, you must add it as a custom value.

As a best practice, do not rename or reuse the existing picklist values. Instead, disable the old picklist value, create a new picklist value, and perform an import or a mass update (or alternatively, Web Services) to change all record values to new picklist values. If you change a value in a picklist, you must verify that the value is updated and changed for each individual record as this is not implemented automatically by Oracle CRM On Demand.

NOTE: In Oracle CRM On Demand (the standard application), the priority of tasks is indicated in task lists by arrows. An up arrow indicates 1-High priority, no arrow indicates 2-Medium priority, and a down arrow indicates 3-Low priority.

If you change the default picklist values for the Priority field on the activity record, an arrow might not be displayed in the Priority field in task lists.

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

To change picklists

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field Management section, click the required Field Setup link.
- 5 In the *record type* Fields page, click the Edit Picklist link for the field whose values you want to customize.

NOTE: Due to specialized coding, customizing the Oracle CRM On Demand Life Sciences Edition Sample Transaction Type picklist, Account Call Type picklist, and Contact Call Type picklist is not supported.

- 6 In the Edit Picklist window:

- To change an existing value, enter the new value in the Picklist Values field, or disable the old value and create a new value.

NOTE: If you want this updated name to appear in the picklists for other activated languages, select the Mark for Translation check box. In the other languages, this updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.

If you do not select Mark for Translation, the other picklist values are unaffected by the change you made here.

- To add a new value, enter the information in the row that appears at the bottom of the list.

To add further new values, click Save & New.

New picklist values you add automatically appear in blue text and brackets in the other activated languages (regardless of the setting of the Mark for Translation check box).

- To delete a value, select the Disabled check box. To hide or show disabled values, click Hide Disabled and Show Disabled respectively.

CAUTION: When you disable values, you also hide the translated versions in other languages.

- To arrange the order in which the picklist values appear, change the numbers in the Order column.

TIP: Consider entering numbers with gaps between them, such as 10, 20, 30, and so on. This allows you to add new values in the middle of the picklist more easily, without reordering the entire list.

- To arrange the picklist values in alphabetical order, click the Save & Order Alphabetically button.

- 7 In the Edit Picklist window, click Save & Close.

8 To manually enter the translated equivalent of the new picklist value:

- a** On the Fields page, select the language from the Translation Language drop-down list.
- b** Click the appropriate Edit Picklist link.
- c** Enter the translated equivalent and click Save.

NOTE: To help you identify the picklist value when you are editing, the application displays the internal ID and the language-specific default value. If you edit the wrong picklist value, the picklist becomes out of sync across languages.

Customizing Related Item Layouts

You can customize page layouts to improve the look-and-feel of Oracle CRM On Demand. The layout functionality for related items allows you to customize a related-list layout for most record types, excluding teams, to show the specified fields. You can select fields from related lists and some parent fields. You can select which fields that you want to appear, and you can specify the order of the fields that meets your business needs. However, you cannot select the number of rows that are displayed, and you cannot specify the sort fields.

Before you begin. To perform this procedure, your role must include the customize application privilege.

The following procedure describes how to customize the related item layout.

To customize the related item layout

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** Click Application Customization.
- 3** In the Record Type Setup section, click the link for the record type that you want.
- 4** In the Page Layout Management section, click the Related Information Layout link that you want for the record type that you selected.

The Related Information Section page appears.

- 5** In the Related Information Setup section, select the related information type that you want to customize. The Related Information Layout page for the selected related information type appears.

NOTE: The items in the Related Information Setup section vary depending on which record type you select.

- 6** Do one of the following:
 - Click Edit to modify an existing layout.
 - Click New Layout to create a new layout.
 - Click Copy to copy an existing layout.

The Related Information Layout Wizard is displayed and guides you through the process.

- 7 In Step 1 Layout Name, enter a name for the layout and a description (optional), and click Next.
- 8 In Step 2 Field Setup, select fields from the available Fields list, and click the up and down arrows, next to the Selected Fields list, to organize the fields in the order that you want.
- 9 Click Finish.

Customizing Static Page Layouts

The right look and feel of an application is important for user adoption, and one way to achieve the right look and feel is by customizing page layouts. As part of the customizing process, you can:

- Add custom fields to the Edit, Detail, and Create forms.
- Make fields required on the Edit and Create forms.
- Add or hide sections on the Detail pages.

You can make sections unavailable (hidden) to your employees or you can make them available but hide them initially.

There are two methods of customizing page layouts. You can define static page layouts defining specific fields by role, or dynamic page layouts that change based on the type of record being created. Dynamic page layouts can also be assigned by role.

NOTE: You can create page layouts for emails, voicemails, and calls in Oracle Contact On Demand. Dynamic layouts are not supported in Oracle Contact On Demand.

You can create new layouts for each record type and then assign a page layout for each record type to a user role. When a user with that role signs in, the user then sees any customized layout specific to each record type. For example, you can create two page layouts for opportunities: one simplified layout for service representatives showing only the most important fields and another layout for field sales representatives showing many more fields, and assign the different layouts to the different roles. Users who are not assigned the service representative or field sales representative roles continue to see the default layout for the Opportunity page. As another example, you can create two page layouts for contacts, such that the Account field is required when service representatives add new contacts, but not required when service managers add new contacts.

If you do not assign a custom page layout for a record type for a given role, the default page is used for that record type.

When customizing a page layout, you can determine:

- Which fields appear on the page

For custom fields to appear, you must add them to the page layouts. After that, users with roles to which the custom page layout is assigned will see the fields on the Edit page, Detail page, and Create form (in the Action bar).
- Where fields appear on the page
- Which fields are required
- Which fields are read-only
- Which linked record types are displayed in the Related Information sections on the Detail page.

For example, you might want linked contacts to appear on the Accounts Detail page.

- How many page sections appear and with which headings.

You can copy standard layouts, but you cannot edit or delete them. You can delete custom layouts, unless it is already assigned to a role or a dynamic layout.

Considerations for Fields in Page Layouts

When you design your page layouts, consider the following:

- Some record fields are important to report and forecast calculations. To enforce the consistent use of these fields, they are flagged as required. You cannot change the required flag on these fields when customizing a page layout. You also cannot remove them from a page layout.
- Removing fields from a page layout can have important implications for how the records are used. For example, if you remove the Status and Publish fields on solutions records, employees with that page layout cannot approve solutions or make them available to others.
- Page layouts and role privileges can be used to limit the fields that users can search for, view in lists, and export. When a user creates or refines a list of records or uses advanced search to find records, the privileges and page layouts assigned to the user's role determine which fields the user can search and view, as follows:
 - If the All Fields in Search and Lists privilege is enabled on the user's role, then the user can search all fields and display all fields on the returned records.

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

- If the All Fields in Search and Lists privilege is not enabled on the user's role, then the user can search and display only the fields that are displayed on the Detail page layout that is assigned to the user role for that record type.

NOTE: If dynamic page layouts are created and assigned to the user's role, then the user can search and display all of the fields that are displayed on the various dynamic page layouts assigned to the user's role.

When a user exports a list, if the List - Export Displayed Fields privilege is enabled on the user's role, but the List - Export all Fields privilege is not enabled, then the user can export the fields that are displayed in the list, but cannot export all fields on the records in the list.

- Addresses are grouped together so that the field and their labels reflect the naming convention for each country. Therefore, for some record types, you cannot separate out individual address lines. Instead, you must select the field that includes the group of address lines (a single address option). This option replaces the individual fields that you could select in previous releases, such as Street, City, Zip Code. For example, for leads, the field Billing appears on the Field Setup and Field Layout steps of the Page Layout assistant. The Billing field includes all the Billing Address fields.

Before you begin:

- To perform this procedure, your role must include the Customize Application privilege.

To create a page layout

- 1 In the upper right corner of any page, click the Admin global link.

2 In the Application Customization section, click the Application Customization link.

3 In the Record Type Setup section, click the link for the required record type.

4 In the Page Layout section, click the required Page Layout link.

5 In the Page Layout list, do one of the following:

- Click the Edit link for an existing layout to modify it.
- Click the New Layout button to create a new layout.
- Click the Copy link to copy an existing layout.

The Page Layout Wizard appears to guide you through the process.

NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link you click.

6 In Step 1 Layout Name, enter a name for the layout and a description (optional).

7 In Step 2 Field Setup, select the field characteristics.

Select the Required check box for any fields that you want to make required.

Select the Read Only check box for any fields that you want to make read only.

CAUTION: Make sure that you do not remove a required field from a page layout. If you do, anyone with that layout will be unable to create or edit a record of that type.

8 In Step 3 Field Layout, you can:

- Move fields from the *record type* Available Fields list to various sections of the *record type* Arrange Page Layout area.

Make sure you move the custom fields and the industry-specific fields you want to add to the forms.

- Rearrange the information.

NOTE: These changes affect all the forms for that record type when a user with an appropriate role views the pages. Some fields include a group of fields or multi-line fields. Avoid moving those fields around since the information itself might overlap other fields in the final layout. For this reason, the application does not allow you to move multi-line text fields, such as Description.

The application uses an address template that provides the fields specific to each country. For more information, see [About Countries and Address Mapping](#) (on page 1286).

9 In Step 4 Related Information, you can:

- Add sections or remove sections that appear on the Detail pages. The sections are the areas where users can link records to the current record.

For example, if you do not want employees to be able to link products to opportunities, make sure the Products section does not appear in the Displayed or Available Information box.

NOTE: Users can change these default settings through the Edit Layout link on the Detail page for their application. After users have edited their personal layouts, they do not see new changes to the related information made by the company administrator until they edit their layout another time.

- Change the order of the sections on the Detail pages.

NOTE: These changes affect the Detail pages for that record type when a user with an appropriate custom role views the pages.

- 10 In Step 5 Related Information Layout, select the appropriate related information layout for each of the related information sections on the page.

NOTE: The default layout for each related information section is the standard one. If you have created custom related information layouts already, you can select them from the list. For more information about creating related information layouts, see [Customizing Related Item Layouts](#) (on page 1056).

- 11 Click Finish.

- 12 Assign the page layout for this record type to user roles as required, see [Adding Roles](#) (on page 1173).

Renaming Field Section Titles

On the record Edit and Detail pages, fields are grouped into sections. To use terminology that is familiar to your users, you can rename the titles above groups of fields on your Edit and Detail pages. On the Account Homepage, for example, you can change Key Account Information to Account Profile.

You cannot rename sections on the standard layouts. You must create a new one and rename the sections on the custom layout.

Sections with no fields in them do not appear on the Detail page.

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

To rename a section

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Page Layout section, click the required Page Layout link.
- 5 In the *record type* Page Layout page, click Edit Sections.
- 6 In the Translation Language drop-down list, select the primary language for your company.
- 7 In the Display Name, type in the name you want to use.
- 8 (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.

If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

- 9 To manually enter the translated equivalent of the new name:
 - a From the Translation Language drop-down list, select the language whose translation you want to enter.
 - b Enter the translated equivalent in the appropriate Display Name field and click Save.
 - c Click the link to return to the Fields page you just updated and select the language again, if necessary. The translated name appears in black text in the Display Name column.

Creating Web Applets

You can embed external Web content by creating a custom Web applet that appears on a Homepage or the Detail page for a record type.

When you create a Web applet, you must add it to the page layout for the Homepage or Detail page. For users to see that page layout, it must be assigned to an appropriate user role.

Before you begin. To perform this procedure, your role must include the Customize Application and Manage Custom Web Applets privileges.

To create a new Web applet

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Page Layout Management section, click the required Page Layout link.
- 5 In the Page Layout list, do one of the following:
 - Click the Edit link for an existing layout to modify it.
 - Click the New Layout button to create a new layout.
 - Click the Copy link to copy an existing layout.

The Page Layout Wizard appears to guide you through the process.

NOTE: The number of steps in the Page Layout Wizard might differ depending on the Page Layout link that you click.

- 6 In the Page Layout Management section, click the record type Web Applet link.
- 7 In the *record type* Applet list, click New.

- 8** On the Web Applet page, complete the following fields.

Field	Comments
Name	Enter a name. The value in the name field appears in the title bar of the Related Information section.
Location	Select Homepage or Detail Page, depending on whether the external content is to appear on a homepage or on the Detail page.

Next, complete the fields according to the type of applet you require, as described in [Creating Custom Web Applets](#) (on page 1080).

To make the Web applet visible

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Type Setup section, click the link for the required record type.
- 4** In the Page Layout section, click the required Page Layout link.
- 5** In the Page Layout list, do one of the following:
 - Click Edit to modify an existing layout.
 - Click New Layout to create a new layout.
 - Click Copy to copy an existing layout.

The Page Layout Wizard is displayed and guides you through the process.

NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link you click. In Step 1 Layout Name, make sure the layout has a name, and if required, a description.

- 6** In Step 4 Related Information:
 - a** Move the new Custom Web applet from the Available Information list to the Displayed Information list.
 - b** Click the up and down arrows to position the new custom Web applet, as required.
 - c** Click Finish to create the new layout.
- 7** Add the page layout to user roles as required, see [Adding Roles](#) (on page 1173).

Related Topic

The following topic provides an example of creating a Web applet that displays a Twitter RSS feed:

- [Example of Setting Up an RSS Feed Web Applet](#) (on page 1087)

Defining Cascading Picklists

Cascading picklists restrict the values of one picklist, the *related* picklist, based on the value selected in another picklist, the *parent* picklist. For example, a parent picklist might present a list of service request Categories and drive the value of a related picklist called Sub-Categories. When the user selects, for example, the value Installation for Category, the Sub-Categories picklist is dynamically constrained to show only the picklist values that are associated with the Installation Category.

You can link together multiple picklists, including both pre-defined and custom picklist fields, as cascading picklists. You can also nest cascading picklists, so a related picklist in one cascading picklists definition can be a parent picklist in another cascading picklists definition.

Before you begin. Before you create a cascading picklists definition, the parent and related picklists must exist. For information about creating picklists, see [Creating and Editing Fields](#) (on page 1043). To perform this procedure, your role must include the Customize Application privilege.

To create a cascading picklists definition

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Cascading Picklists section, click the required Cascading Picklists link.

The record types listed include the parent record type and related record types that have custom picklist values. For example, for opportunities there are links for Opportunity Partner, and Opportunity Competitor.

- 5 In the Cascading Picklists page, do one of the following:
 - Click Edit or Copy to modify an existing cascading picklists definition.
 - Click the New button to create a new cascading picklists definition.

The Cascading Picklists Wizard guides you through the process.

- 6 In Step 1 Select Picklists, select a parent picklist and a related picklist.
- 7 In Step 2 Select Values, you can:
 - View the existing associations between a Parent Picklist value and the Related Picklist values. When you select a value in the Parent Picklist Available Values list, the available values for the related picklist are shown in the Related Picklist Available Values list, and the values that will be displayed are shown in the Related Picklist Displayed Values list. If there are no values in the Related Picklist Displayed Values list, all of the values in the related picklist will be displayed when the corresponding value in the parent picklist is selected.
 - Create a new association. Move the desired value from Related Picklist Available Values to Related Picklist Displayed Values.
 - Remove an existing association. Move the value from Related Picklist Displayed Values to Related Picklist Available Values.

- 8** In Step 3 Confirm, you can confirm your selections of Related Picklist values for each Parent Picklist value, and then click Finish to complete defining the cascading relationship between the Parent and the Related picklists.

Clicking Finish in the wizard returns you to the Cascading Picklist List for the current record type.

After you click Finish, and add the cascading picklists definition to a page layout, it is automatically activated for all roles that include that layout.

Managing Search Layouts

For most record types you can specify the fields, both standard and custom fields, which users can use when searching for records. Also, you can specify the fields that are displayed in the search results page. You specify the search fields in a search layout, and you assign a search layout for each record type to user roles as required, see [Adding Roles](#) (on page 1173).

You can copy an existing search layout and then modify it to your requirements, or you can edit existing search layouts. The default search layout is read-only. You can copy it, but you cannot delete or edit it.

CAUTION: When you create or edit a search layout for the User record type, do not add both the Reports To field and the Reports To (Alias) field to the same search layout. If both of these fields were made available on a search layout, then searches using that search layout would fail. For more information about the Reports To and the Reports To (Alias) fields, see [About the Reports To and Reports To \(Alias\) Fields on User Records](#) (on page 1120).

Before you begin. To perform this procedure, your role must include the customize application privilege.

The following procedure describes how to create or modify a search layout.

To create or modify a search layout

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Type Setup section, click the record type for which you want to create or modify a search layout.
- 4** In the *record type* Application Customization page, click the *record type* Search Layout link.
- 5** In the Search Layout list, do one of the following:
 - Click Edit or Copy to modify an existing layout.
 - Click the New Layout button to create a new layout.
 - Remove an existing layout not currently assigned to a role.

The Search Layout Wizard guides you through the process.

- 6** In Step 1 Define Layout Name, enter or modify the name or description for the layout.
- 7** Click Next.

In Step 2 Specify Targeted Search Fields, there are two lists:

- **Available fields.** Move fields from the Available Fields list to the Selected Fields list. The Available Fields list includes all the indexed and nonindexed fields, in alphabetical order. Indexed fields are displayed in green text. Indexed fields that are also case insensitive are displayed in blue text.

NOTE: For optimal performance, use indexed fields when defining your targeted search fields. Move fields from the Available Fields list to the Selected Fields list.

- **Selected Fields.** These are the fields you chose from the Available Fields menu. You can arrange these fields by clicking the up and down arrows. The maximum number of fields that you can choose from the Available Fields menu is 7.

- 8 In Step 2, move the fields to the Available Fields list, and arrange them, if necessary.

CAUTION: It is recommended to add columns to the list sparingly because the number of columns in the lists can directly affect performance. The performance varies dramatically by Record Type and by the column type. Each additional field can increase the list loading time.

- 9 Click Next.

In Step 3, Define Search Results Layout, there are two additional lists:

- **Lookup Window and Search Results Fields.** Specify the fields that you want to display only on the Search Results page. They will be available for targeted search in the Search section of the Action bar. They will also be available as prepopulated default fields in the Advanced Search criteria form. They also appear as prepopulated default fields in the search criteria when creating new Lists.

The Lookup window and the Search Layout list have a limit of 9 fields. The total number of fields allowed with the fields listed in the Additional Search Results Fields list is 20, which means the Search Results page cannot display more than 20 columns. For more information about searching for records, see [Finding Records](#) (on page 41). If you are copying a layout, the default fields for the record type are displayed in the Selected Fields list. If you want to keep the original configuration of the Lookup window, select the check box, Configure Lookup window with the default field.

- **Additional Search Results Fields.** These are extra fields that you can choose to display in the Search Results Page. You can arrange these fields, as required. The total number of fields allowed with the fields listed in the Lookup window and the Search Layout list is 20, which means the Search Results page cannot display more than 20 columns.

- 10 In Step 3, Define Search Results Layout, move fields from the Lookup Window and Search Results Fields list to the Selected Fields list, and rearrange them, as necessary.

- 11 Click Finish.

Related Topics

See the following topics for related information:

- [Customizing Related Item Layouts](#) (on page 1056)
- [Customizing Static Page Layouts](#) (on page 1057)
- [Creating Record Homepage Layouts](#) (on page 1068)

Managing List Access and List Order

For each record type you can specify the lists that are available for each role, and the order in which the lists are displayed on the record type's Homepage.

You can create a new layout for only those roles that you have not already customized. You can also edit or delete existing layouts. You cannot manage the list access and order for a user's private lists.

Before you begin:

Because you must select a role that this customization applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customize Application privilege, and the Manage Public Lists and Role Management privileges.

To create or modify list access

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the List Access and Order section, click the *record type* List Access and Order link.
- 5 In the List Order Layout page, do one of the following:
 - Click Edit or Copy to modify an existing layout.
 - Click the New Layout button to create a new layout.
- 6 If you are creating a new layout, select a role from the Role Name drop-down list.
Only roles that do not already have an associated layout are available in the drop-down list.
- 7 Move lists between the All Lists, Lists Available for this Role, and Show in Short List lists as required.
 - All Lists contains all the lists for the record type, apart from private lists.
 - Lists Available for this Role contains all the lists available for the role that you select.
 - Show in Short List contains the lists displayed in the List section in the Homepage for the record type, and the drop-down menu in the record type view.
- 8 Rearrange the order of the lists as required using the up and down directional arrows.
- 9 Click Save.

Creating Homepage Custom Reports

You can add multiple reports, including both prebuilt and custom reports, to the record type Homepages. This feature allows you to provide the most relevant information to different users. For example, you can configure the Service Request Homepage for a customer service representative to show a custom service-request report.

For some record types, standard reports are shown on the record type Homepage by default. You can replace the standard reports with different reports, or you can add additional reports. You can also specify Homepage reports for record types where no report is shown on the record type Homepage by default.

To make a prebuilt or custom report available on a record type Homepage, you first create a Homepage Custom Report record for the report. When you create or edit the Homepage layouts for a record type, any Homepage custom report records that you created for the record type are listed in the Available Sections list in the Homepage Layout Wizard. You can then make a report available on a Homepage layout as follows:

- You can add the report to a Homepage layout, so that any user whose role has that Homepage layout automatically sees that report on their record type Homepage.
- You can leave the report as an available section on a record type Homepage layout, so that any user whose role has that Homepage layout and the Personalize Homepages privilege can add the report to his or her record type Homepage.
- If you do not want users with a certain role to be able to add the report to their record type Homepage, you can move the report out of the Available Sections list in the Homepage Layout Wizard.

For more information about customizing Homepages, see [Creating Record Homepage Layouts](#) (on page 1068).

If your role has the appropriate privileges, you can create custom reports and add them to custom Homepage layouts for all record types. The following table shows the privileges required for the various tasks involved in making a custom report available on a Homepage.

Task	Privilege Needed	Notes
(Optional) Create a custom report and publish it to a company-wide folder	Manage Custom Reports	For more information, see Getting Started with Answers (Custom Reports) (on page 698).
Create a Homepage custom report	Customize Application Customize Application - Manage Homepage Customization	Instructions for this task are provided in this topic.
Add a custom report section to a Homepage layout	Customize Application Customize Application - Manage Homepage Customization	For more information, see Creating Record Homepage Layouts (on page 1068).
Add a Homepage layout to a user role	Manage Users and Access	For more information, see Adding Roles (on page 1173).
(Optional) Add or remove a custom report section on a Homepage (end user)	Personalize Homepages	For more information, see Changing Your Homepage Layouts (on page 620).

Before you begin. The custom report that you want to enable in a Homepage must have been created and saved before you can perform this procedure.

To create a Homepage custom report

- 1 In the upper-right corner of any page, click the Admin global link.

- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Homepage Layout Management section, click *record type* Homepage Custom Report.
- 5 In the Name field, enter the name of the custom report.
- 6 In the Height and Width fields, select Single or Double.

If you want the report to span the entire Homepage from left to right, set the width to Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.

NOTE: Reports that have an HTML RowSpan attribute value of more than 2 sometimes span beyond the specified size.

- 7 If required, select the Execute Report Immediately check box.

If you select this check box, the report will run automatically, and users will not have to click a link to update the report.

- 8 In the Report Path field, enter the path of the report.

You can paste the report path from the Open Analysis window. To copy the report path:

- a Click the Open Analysis button in the Getting Started with Answers page.
- b Select a report.
- c Copy the value in the Item field.

For example:

Company wide Shared Folder: Pre-built Analysis/Sales Stage History Analytics: Last Month Sales Report

- 9 Click Save.

Creating Record Homepage Layouts

You can create custom Homepage layouts for all record types. This feature allows you to provide the most relevant information to different users, including the ability to display custom reports on record type Homepages. For example, you can configure the Service Request Homepage for a customer service representative to show the user's current service-request-related task and a custom service-request report.

NOTE: If you want to use a prebuilt or custom report in a custom Homepage layout, you must first create a Homepage custom report record for the report, using the procedure described in [Creating Homepage Custom Reports](#) (on page 1066).

You can copy an existing Homepage layout and then modify it to your requirements. You can also edit existing Homepage layouts, with the exception of the default Homepage layout, which is read-only. You can copy the default Homepage layout, but you cannot delete or edit it.

After you create a custom Homepage layout, you must use the Role Management Wizard to assign the layout to the user roles that need to use that layout. Users whose role includes the Personalize Homepage privilege

can customize their own Homepage layout for a record type. The customized layout can display any of the sections that you make available to them in the Homepage layout that is assigned to the users' role for that record type.

Before you begin. To perform this procedure, your role must include the Customize Application privilege and the Customize Application – Manage Homepage Customization privilege.

To create or modify a Homepage layout

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Homepage Layout Management section, click the *record type* Homepage Layout link.
- 5 In the Homepage Layout list, do one of the following:
 - Click Edit or Copy to modify an existing layout.
 - Click the New Layout button to create a new layout.

The Homepage Layout Wizard appears to guide you through the process.

- 6 In Step 1 Layout Name, enter a name for the layout, and a description if required.
- 7 In Step 2 Homepage Layout, specify the available and displayed sections as follows:
 - Move sections from the All Sections list to the Available Sections list.

The Available Sections list includes the sections that can be added to a Homepage. If you do not want a user to be able add a section to a Homepage, leave the section in the All Sections list.
 - Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

Leave sections that are double width in the Left Side list. They automatically stretch across the Homepage when it is displayed.

- 8 Click Finish.

NOTE: After you add a custom Homepage layout to the application, you need to make it available to a user role before users can see it. For more information on adding and modifying user roles, see [Adding Roles](#) (on page 1173). Users whose role has the Personalize Homepage privilege can edit the layout of their Homepages with any list or report you make available to them in the Homepage layout assigned to their role for that record type.

Customizing the Audit Trail

You can track the creation, deletion, and restoration of audited fields in Oracle CRM On Demand, as well as specify which fields in the audit trail for certain record types are tracked if those record types are set up for your company. The following table lists the default audited fields. When users make updates to fields on

those record types that an administrator has marked as auditable, an audit trail record is generated that tracks information, such as the old and new value, as well as the timestamp and user who made the change.

For new customers and those upgrading Oracle CRM On Demand to this release, if you are auditing specific fields for record types, the auditing of the creation, deletion, and restoration of specific fields for record types is enabled by default. If you are not auditing specific fields for record types, all auditing of record creation, deletion, and restoration of specific fields for record types is disabled. Then customers can change these record level audit settings.

You can view all changes to company-wide auditable record types, such as those created, deleted, or restored, using the Master Audit Trail. For more information, see [Reviewing Audit Trail Changes with the Master Audit Trail](#) (on page 1024).

The auditing of opportunities, service requests, and users is enabled by default. However, other record types must be configured by either enabling the record types for use with your company, or selecting the fields that you want to audit. You must ensure also that the audit trail related information for the record type that you want to audit is set to Read-only. For more information about access profiles, see [Process of Setting Up Access Profiles](#) (on page 1164).

For each of the record types, you can specify that other fields, both standard and custom fields, are audited. If you want to increase the maximum number of audited fields, edit the field, Record Type Auditable Fields, in your company profile. The total number of audited fields available is also displayed in the Audited Fields Administrator Setup page.

Auditing Takes More Time and Resources

Auditing involves additional processing to evaluate the appropriate business rules and to add the additional data to storage. As a result, the operation requires more time when you enable auditing. To minimize the impact, the initial number of auditable fields is limited to 35 for each record type. If you decide to increase the limit by editing the Record Type Auditable Fields in your company profile, the processing takes longer. The more fields you change and mark as auditable on a record type, the longer it will take to save the record.

Some record types have certain fields audited by default. However, other fields have none.

Record Type	Default Audited Fields
Opportunity	Revenue, Close Date, Forecast, Sales Stage, Probability, Owner
Service Request	Subject, Description, Area, Cause, Type, Source, Priority, Status, Owner
Fund	Status, Partner, Target Amount, Owner
Fund Request	Approved, Claim Req., Claim Decision Date, Due Date, Fund, Pre-Approval Date, Pre-Approval Req., Granted, Status, Owner
Account	No fields are audited by default.
Contact	No fields are audited by default.
Custom Objects 01 or higher	No fields are audited by default.

Record Type	Default Audited Fields
MDF Request	Fund, Amount Requested, Amount PreApproved, Total Claim Amount Requested, Total Claim Amount Approved, Submitted Date, Pre-Approval Date, Claim Decision Date, Submission Status, Approval Status, Claim Status
Special Pricing Request	Total Amount Requested, Total Amount Authorized, Total Claim Amount Req., Total Claim Amount Approved, Submitted Date, Authorized Date, Claim Decision Date, Submission Status, Approval Status, Claim Status
Deal Registration	Name, Type, Submission Status, Principal Partner, Expiration Date, Partner Program, Associated Opportunity, Associated Lead, Associated Customer, Associated Contact, Deal Size, Currency, Close Date, Product Interest, Company Name, First Name, Last Name, Email, Telephone #, Cell Phone, Fax, Approval Status, Current Approver, Reject Reason, Originating Partner Account
Application	Name, Location, Partner, Partner Program, Partner Type, Annual Revenue, Application ID, Approval Status, Approved Date, Campaign, Currency, Current Approver, Email Address, Existing , Partnerships, Expected Partnership Benefits, First Name, Last Name, Industry, Main Phone Number (#), Main Fax Number (#), Number of Employees, Program Level, Reject Reason, Source, Submission Status, Submitted Date, Work Phone Number (#), Work Fax Number (#)
Policy	Policy Status, Face Amount
User	Role, User Sign In ID, External Identifier for Single Sign On, Status, Email

The following considerations apply to fields regarding auditing:

- For Accounts, Contacts, and Custom Objects 01 or higher, ensure that the access profiles are correctly configured to have access to the audit trail child applet. Administrators must provision access to the specific roles requiring access to the audit trail child applet.
- Mandatory fields are displayed in red. You cannot save the User Audit Trail if you remove any of the selected mandatory fields.
- For foreign key fields, the name (not the ID) is stored and displayed in the audit trail. For example, if the Account relation on Opportunity is audited, the audit trail displays the account name instead of the Row ID.
- No address fields are available for any of the auditable record types.
- Picklist fields show the user's language dependent values (LDVs).
- ID columns that are not displayed on the layouts are not available for auditing.

NOTE: For security reasons, the default audited fields for the User record type cannot be disabled.

Before you begin. To perform this procedure, your role must include the Customize Application privilege and the Administer Field Audit privilege.

To customize the audit trail for a record type

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.

- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field audit Setup section, click the *record type* Field Audit Setup link.
- 5 (Optional) Select Audit *record type* Record Creation if you want to track the creation of records in the audit trail.
- 6 (Optional) Select Audit *record type* Record Deletion/Restore if you want to track the deletion or restoration of records in the audit trail.
- 7 In the Audit Field Setup page, move fields from the Available fields list to the Audited Fields list as required.

An error message is displayed if you exceed the company limit.

The Available Fields list contains all the standard and custom fields for the record type that are not already audited.
- 8 Click Save.

Auditing of a field becomes effective immediately after it is enabled.

About the Information in Modified Fields on Records

Oracle CRM On Demand uses the following system fields to store information about the most recent change to a record:

- Modified External
- Modified: Date
- Modified By
- Modified: Date External

In certain cases, Oracle CRM On Demand writes information to one or more of these fields to reflect a change to the record that is not caused by an explicit user action. For this reason, it is recommended that you do not rely on the information in these fields to track the changes that users make to records. Instead, use the audit trail feature to track the changes that users make to specific fields on records. For information about customizing the audit trail for record types, see [Customizing the Audit Trail](#) (on page 1069).

The following is an example of a system change to the Modified By field on a record. A user deletes an account that is linked to a contact record as the primary account for the contact. When the deleted account record is purged from the database, the link between the deleted account and the contact is removed from the database. After the link is removed from the database, the next time that the contact record is opened by any user, Oracle CRM On Demand selects another linked account as the primary account on the contact and writes the ID of the account to the primary account field. Or, if there are no accounts linked to the contact, then Oracle CRM On Demand updates the record to reflect that. Oracle CRM On Demand then updates the Modified By field with the name of the user who opened the contact record.

Specifying Dynamic Page Layouts

Dynamic layouts streamline the application for end users by allowing them to manage only the subset of information that is relevant in a given situation. For example, your company might track several different

types of accounts, such as customer-type accounts, prospect-type accounts, or partner-type accounts. With the dynamic page layout feature, you can configure different layouts that show a different set of account fields and related items, based on the type of account. You can then associate the different layouts with one or more user roles. When the user drills down on a particular account record, the user is shown the appropriate page layout, based on the user's role and the type of account.

When you define dynamic page layouts for a record type, a pre-defined picklist value is used to drive the dynamic rendering of the page layouts. You specify a page layout to be displayed for each value of the picklist. The users can then see different page layouts for different records of the same record type, based on the picklist value that they select in the record.

You must associate your dynamic page layouts with user roles as required. There is a many-to-many relationship between dynamic page layouts and user roles.

Each picklist value has only one layout associated with it, but a page layout can be associated with multiple picklist values. There is a limit of 200 associations between picklist values and page layouts. You cannot delete a layout that is already associated with a user role.

Caution: It is recommended that all dynamic layouts associated with a driving picklist include the driving picklist. If one of your assigned layouts does not have the driving picklist, and the picklist value associated with that layout is selected and saved for a record, you will not see the driving picklist on the layout, and so you cannot edit the field.

The following table shows the predefined driving picklist values for each record type.

Record Type	Driving Picklist
Account	Account Type
Appointment	Type
Business Plan	Type
Campaign	Campaign Type
Contact	Contact Type
Lead	Lead Source
Opportunity	Opportunity Type
Objectives	Type
Service Request	Type
Solution	Status
Task	Type
Fund	Status
Fund Request	Status
Household	Segment
Portfolio	Account Type
Dealer	Status

Record Type	Driving Picklist
Vehicle	Product Type
Vehicle Finance Info	Finance Type
Med Ed	Type
Partner	Partner Organization Status
Partner Program	Partner Type
Revenue: Account Revenue	Type
Revenue: Contact Revenue	Type
Activity: Appointment	Type
Activity: Task	Type
Asset	Asset Type
Revenue	Type
Opportunity Product Revenue	Type
Custom Objects 01-03	Type
Custom Objects 04 or higher	Type
MedEd Event	Type
Call Activity	Type
Policy	Line of Business
Allocation	Type
Messaging Plan	Type
Inventory Audit Report	Type
Sample Transaction	Type

Page layouts and role privileges can be used to limit the fields that users can search for, view in lists, and export. When a user creates or refines a list of records or uses advanced search to find records, the privileges and page layouts assigned to the user's role determine which fields the user can search and view, as follows:

- If the All Fields in Search and Lists privilege is enabled on the user's role, then the user can search all fields and display all fields on the returned records.

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

- If the All Fields in Search and Lists privilege is not enabled on the user's role, then the user can search and display only the fields that are displayed on the Detail page layout that is assigned to the user role for that record type. If dynamic page layouts are created and assigned to the user's role, then the user can

search and display all of the fields that are displayed on the various dynamic page layouts assigned to the user's role.

When a user exports a list, if the List - Export Displayed Fields privilege is enabled on the user's role, but the List - Export all Fields privilege is not enabled, then the user can export the fields that are displayed in the list, but cannot export all fields on the records in the list.

Before you begin. To perform this procedure, your role must include the Customize Application privilege and the Customize Application - Manage Dynamic Layouts privilege.

To create or modify a dynamic page layout

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Dynamic Layout Management section, click the *record type* Dynamic Layout link.
- 5 In the Dynamic Page Layout list, do one of the following:
 - Click Edit or Copy to modify an existing layout.
 - Click the New Layout button to create a new layout.

The Dynamic Layout Wizard guides you through the process.

- 6 In Step 1 Layout Name:
 - a Enter a name for the Dynamic Layout.
 - b Select a Default Layout. This layout is presented as the default layout in the next step.The Driving Picklist field shows the picklist whose values determine which layout is seen by the users.
- 7 In Step 2 Assign Layouts, associate each of the picklist values with a layout name.

NOTE: For each dynamic page layout, there is a limit of 200 associations between driving picklist values and page layouts.

The layout you select is displayed when a record has the corresponding picklist value.

- 8 Click Finish.

Managing the Behavior of Lookup Windows

You can manage the behavior of Lookup windows, which are used with the smart-association functionality of Oracle CRM On Demand. Smart associations make it easier for users to associate different record types, such as Account, Contact, Opportunity, Activity, and so on with each other.

For examples, in cases where there is a single association, users can type the name of the associated record and the application automatically attempts to resolve the association. For example, when creating a task, users can type an account name in the Account field. When the user saves the record, the application then automatically searches for accounts that match. If a unique match is found, the appropriate account is used. If no matches or multiple potential matches are found, the user is presented with a Lookup window where they can perform additional searches or pick the appropriate account. Rather than use this auto-resolve feature, the user can also click the Lookup icon to display the Lookup window directly.

In addition, certain areas of the application allow multiple associations. For example, users can associate multiple contacts with tasks, as they are creating or editing the task. (This multi-association control is not provided in the default page layout, so you must add it to the page layout.) On the Task Edit screen, when the user clicks the Lookup icon to associate contacts, the Lookup window is pre-filled with contacts associated with the account that was specified for the task. The user can then select one or more contacts in this Lookup window to associate those contacts with the task. This capability is not available for all associations. It exists only for certain configured association controls. For example, if the Account field in a Task record has a valid value, and you click the Lookup icon for Opportunities, the window is not pre-filled with records, but the user can select a list of opportunities from the drop-down list.

Two options are available for configuring the behavior of the Lookup window for each record type:

- **Execute Default List on Lookup Window.** If this option is selected, the list of available records is displayed in the Lookup window when it is opened. If the option is not selected, no records are displayed when the Lookup window is opened. This option is selected by default.

NOTE: If manager visibility is enabled for the company, the list of records in some Lookup windows can be slow to populate, and in some cases, the Lookup window might time out. To prevent this, clear the Execute Default List on Lookup Window check box for the record type associated with the Lookup window. The Lookup window then displays no records, and users can specify search criteria to find the records that they want.

- **Auto-resolve Enabled.** If this option is selected, smart associations are automatically resolved. If it is not selected, smart associations are not automatically resolved, and the user must click the Lookup icon and use the Lookup window. This option is selected by default.

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

To manage the behavior of the Lookup windows

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Lookup Window Setup section, click the *record type* Lookup Window Setup link.
- 5 In the Lookup Window Setup page, select or clear the following check boxes:
 - Execute Default List on Lookup Window
 - Auto-resolve Enabled
- 6 Click Save.

For the options to take effect, you must sign out of the application and sign in again.

Displaying External Web Pages in Tabs

You can display Web content in a tab within Oracle CRM On Demand. The Web content can be external Web pages or company data available from the Web. For example, you might track inventory information in another Web application, which you want to make available to your service representatives when they are working in Oracle CRM On Demand. To address this requirement, you can create a custom Web tab to display your external Web application within the main content area of Oracle CRM On Demand.

You can also create custom Web applets to contain Web content. For information about custom Web applets and how they compare with custom Web tabs, see [About Custom Web Applets](#) (on page 1079).

To make a custom Web page visible, you must add the tab to the required user role using the Role Management Wizard.

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

Before you can display external information on an Oracle CRM On Demand page, you must ensure that:

- The external application has a Web interface
- The external application or Web page does not require full control of the browser window

NOTE: You must ensure Web services are enabled for your company if you plan to use features such as Single Sign On, or to integrate your Web site with Oracle CRM On Demand.

To display an external Web page in a tab

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Application Setup section, click the Custom Web Tabs link.
- 4 On the Custom Tab List page, click New.
- 5 On the Custom Web Tab page, use the table below to fill in the required information and save the record.
- 6 (Optional) To indicate that an updated name must be translated to other languages that are activated for your company, select the Mark for Translation check box (on the Custom Web Tab Lists page) for the Web tab.

Field	Comments
Name	The name of the custom Web tab.
Type	Select URL or HTML.

Field	Comments
User Fields	Select an option from the User Fields drop-down list to add user parameter fields to the URL or HTML field at the current position of the cursor. For example, if you choose User id from the drop-down list, %%%User id%%% is inserted into the URL or HTML field, depending on where your cursor is positioned. At run-time, this parameter is replaced with the user ID of the user who is signed in.
URL	<p>NOTE: This setting is available only if you select URL from the Type menu.</p> <p>Enter the URL that is invoked when the user clicks the hyperlink, such as www.oracle.com. You do not have to enter the <i>http://</i> part of the URL.</p> <p>You can also include context-sensitive parameters by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value that is based on the current record when the user clicks the value. If you do not specify any URL, then the user is directed to a void URL when clicking the tab.</p> <p>Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser when they click the Web tab.</p>
HTML Head Additions	<p>NOTE: This setting is available only if you select HTML from the Type menu.</p> <p>The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web tab. Any code that you add to the Web Tab HTML field is added to the <iframe> element. You can include references to JavaScript files that you embed in the <head> section of the HTML in this field.</p> <p>Referencing JavaScript files in Oracle CRM On Demand pages is not supported. Any content that you enter in this field is added to the <head> tags.</p>
Web Tab HTML	<p>NOTE: This setting is available only if you select HTML from the Type menu.</p> <p>The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web tab. Any code that you add to the Web Tab HTML field is added to the <iframe> element. Any content that you enter in this field is added to the <body> tags.</p>

Field	Comments
Description	Enter a description for the Web tab.
Height	Enter a pixel value for the Web tab.
Width	Enter a pixel value for the Web tab.
Icon	Click the Lookup icon next to the Icon label, and select an icon from the window.

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation Language list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. The updated name in blue text helps you to track which terms must be translated.

After you add a custom Web page to Oracle CRM On Demand, you must make it available to the user role before users can see it. For information on adding roles, see [Adding Roles](#) (on page 1173).

About Custom Web Applets

Custom Web applets allow you to embed external Web content within:

- A record type's Details page
- A record type's Homepage
- My Homepage
- The Action bar

You can create three types of Web applet, which allows you to embed different types of Web content:

- **Feed.** Used to embed RSS feeds. For example, you might want to embed a news feed on My Homepage.
Note: Only the RSS 2.0 standard is supported.
- **HTML.** Used to embed HTML code. For example, use this Web applet to embed Web widgets from an external source such as Google Maps.
- **URL.** Used to embed the content available at the specified URL in an applet within Oracle CRM On Demand. For example, you might have a custom Web applet on the Lead Details page that allows you to see a Google search on that lead's name.

You can add a Web applet for any record type for which the Page Layout links are visible.

There are two advantages to creating a custom Web applet rather than a custom Web tab:

- A custom Web applet that is displayed on a page, such as Lead Details, allows you to view data on the Details page together with other contextual data. On the other hand, if your external data is viewed using a Web tab, when you click the Web tab, you are directed away from the Details page, and redirected to the Web tab page.

- Your company might have a great deal of information that you want to display, for example, portfolio holdings. Custom Web applets allow you to show a large amount of data from another Web site without requiring you to load information in to Oracle CRM On Demand. Loading large amounts of data in to Oracle CRM On Demand requires integration tools to manage large numbers of data columns.

For information about creating Web applets for a record type, see [Creating Web Applets](#) (on page 1061). For information about creating Web applets for My Homepage, see [Creating Global Web Applets](#) (on page 1086).

Creating Custom Web Applets

You can create three types of custom Web applets (RSS feed, HTML and URL), and add them to the following places in Oracle CRM On Demand:

- For global Web applets:
 - Action bar
 - My Homepage
- For record type Web applets:
 - Record type homepage
 - Detail page

The following sections describe how to create the different types of custom Web applet.

Creating an RSS Feed Applet

Create this type of applet for RSS feeds that you want to embed in the application. Configure RSS feed applets so that embedded content is relevant to user roles.

You can allow users to configure RSS feed applets, but it is recommended that you make only a small number of applets configurable. If you add an RSS feed applet to the Action bar, and make the records available in a custom Web tab, users can read the feeds more easily, because they do not have to navigate to a different page.

To create an RSS feed applet

NOTE: This is the final step in creating a Web applet, as described in the topics: [Creating Web Applets](#) (on page 1061) and [Creating Global Web Applets](#) (on page 1086).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Name	Name of the Web applet.
Location	The values available for this field vary depending on where you access the Web applet page. For example, if you access this page from a global Web applet, the available values are: Action Bar and Homepage.

Field	Comments
Columns	<p>NOTE: This field is applicable only when the Location value is Homepage.</p> <p>Specify the width of the applet by selecting single or double from the Columns menu.</p>
Type	Select Feed.
User Fields	<p>Select an option from the User Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor.</p> <p>For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At run time, this parameter is replaced with the user ID of the user who is signed in.</p>
Record Type Fields	<p>NOTE: This field is applicable only when the Location value is Detail Page.</p> <p>Place your cursor in the URL field where you want to add a parameter, and then select the field that you want to include from the drop-down list.</p> <p>For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.</p>
URL	<p>Enter the URL that is invoked when the user clicks the hyperlink, such as http://rss.news.yahoo.com/topstories.</p> <p>You must include <i>http://</i> in the URL.</p> <p>You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the applet calls the source URL.</p> <p>If you do not specify any URL, the user is directed to a void URL when clicking the link.</p> <p>NOTE: Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser.</p>
Let users override URL	Configure RSS feed applets for content that is relevant to user roles. While you can enable users to configure RSS feed applets, it is recommended that you make only a small number of applets configurable.

Field	Comments
Open Records in	Select a value depending on whether you want records to open in the current browser window or a new browser window. If you want to add the RSS feed applet to the Action Bar, remember that the feeds are easier to read in a new browser window. In doing this, it prevents the user needing to navigate to a different page.
Height	The height of the applet in pixels.

Creating an HTML Web applet

Create this type of applet for embedded content in the HTML code, to which you want to make additions.

To create a HTML Web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: [Creating Web Applets \(on page 1061\)](#) and [Creating Global Web Applets \(on page 1086\)](#).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Name	Name of the Web applet.
Location	The values available for this field vary depending on where you access the Web applet page. For example, if you access this page from a global Web applet, the available values are: Action Bar and Homepage.
Columns	NOTE: This field is applicable only when the Location value is Homepage. Specify the width of the applet by selecting single or double from the Columns menu.
Type	Select HTML.
Record Type Fields	NOTE: This field is applicable only when the Location value is Detail Page. Place your cursor in the Web Applet HTML field where you want to add a parameter, and then select the field that you want to include from the drop-down list. For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.

Field	Comments
HTML Head Additions	<p>The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web applet. Any code that you add to the Web Applet HTML field is added to the <iframe> element. You can include references to JavaScript files that you embed in the <head> section of the HTML in this field.</p> <p>Referencing JavaScript files on Oracle CRM On Demand pages is not supported. Any content that you enter in this field is added to the <head> tags.</p>
Web Applet HTML	<p>The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web applet.</p> <p>Any code that you add to the Web Applet HTML field is added to the <iframe> element. Any content that you enter in this field is added to the <body> tags.</p>
Always Run	This flag determines whether a custom Web applet will be executed if the applet is minimized. This flag is available only for custom Web applets that are on the Detail page.
Height	The height of the applet in pixels.

Creating a URL Web Applet

Create this type of applet when you want to embed content from a URL in an IFrame.

To create a URL Web applet

NOTE: This is the final step in creating a Web applet, as described in the topics [Creating Web Applets](#) (on page 1061) and [Creating Global Web Applets](#) (on page 1086).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Name	Name of the Web applet.
Location	The values available for this field vary depending on where you access the Web applet page. For example, if you access this page from a global Web applet, the available values are: Action Bar and Homepage.
Columns	NOTE: This field is applicable only when the Location value is

Field	Comments
	<p>Homepage.</p> <p>Specify the width of the applet by selecting single or double from the Columns menu.</p>
Type	Select URL.
User Fields	<p>Select an option from the User Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor.</p> <p>For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At run time, this parameter is replaced with the user ID of the user who is signed in.</p>
Record Type Fields	<p>NOTE: This field is applicable only when the Location value is Detail Page.</p> <p>Place your cursor in the URL field where you want to add a parameter, and then select the field that you want to include from the drop-down list.</p> <p>For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.</p>
URL	<p>Enter the URL that is invoked when the user clicks the hyperlink, such as http://maps.google.com.</p> <p>You must include the <code>http://</code> part of the URL.</p> <p>You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the user clicks the value. For example, the following URL passes in the shipping address to Google maps: <code>http://maps.google.com/?q=%%%Ship_To_ADDR_Address1 %%%, +%%%Ship_To_CITY_City%%%, +%%%SHIP_LIST_USSTATE%%%</code></p> <p>If you do not specify any URL, the user is directed to a void URL when clicking the link.</p> <p>NOTE: Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser.</p>
Always Run	This flag determines whether a custom Web applet will be executed if the applet is minimized. This flag is only available for custom Web applets located on the Detail page.

Field	Comments
Height	The height of the applet in pixels.

Related Topic

The following topic provides an example of creating a Web applet that displays a Twitter RSS feed:

- [Example of Setting Up an RSS Feed Web Applet](#) (on page 1087)

Creating and Managing Action Bar Layouts

The Action bar can contain a number of sections, such as Message Center, Search, Communication Tools, and Recently Viewed. You can create custom layouts for the Action bar and assign them to specific roles in Oracle CRM On Demand.

Making the Action Bar Unavailable to Users

By default, the Action bar appears on the left side of all Oracle CRM On Demand pages. Users can hide or show the Action bar as required. For more information, see [Showing or Hiding the Action Bar](#) (on page 32).

If you want the Action bar to be unavailable to a certain user role, then set up an action bar layout that is empty (that is, no sections are displayed or available in the layout), and assign that layout to the user role. The Action bar is then permanently hidden from the users who have that user role.

The following procedure describes how to add an action bar layout.

To add a new action bar layout

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Application Setup section, select Action Bar Layout.
- 4 In Action Bar Layout, click New Layout.
- 5 In the Layout Name field, enter a name for the new action bar layout.
- 6 In the Description field, enter a name for the new action bar layout, and click Next.
- 7 Choose the fields to display in the action bar layout by moving fields from the Available Sections to the Displayed Section using the left and right arrows. Use the up and down arrows to change the order of the selected fields.

8 Click Finish.

9 (Optional) Click the Edit button to edit any of the values you entered in steps 4 to 7.

Alternatively you can copy the existing default action bar layout provided in Oracle CRM On Demand and change the description and configuration to your requirements.

To copy an action bar layout

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Application Setup section, select Action Bar Layout.

4 Click the Copy link to the left of Action Bar Layout.

5 In the Layout Name field, enter a name for the new action bar layout.

6 In the Description field, enter a name for the new action bar layout, and click Next.

7 Choose the fields to display in the action bar layout by moving fields from the Available Sections to the Displayed Section, using the left and right arrows. Use the up and down arrows to change the order of the selected fields.

8 Click Finish.

NOTE: To copy other action bar layouts, click the down arrow to the left of the action bar name to display the copy function.

Creating Global Web Applets

A global Web applet is a custom Web applet that can appear on a homepage or on the Action bar.

When you create a global Web applet, you must add it to the layout for the homepage or Action bar.

Before you begin. To perform this procedure, your role must include the Customize Application and Manage Custom Web Applets privileges.

To create a new global web applet

1 In the upper-right corner of any page, click the Admin global link.

2 In the Application Customization section, click Application Customization.

3 In the Application Setup section, select Global Web Applets.

4 In the My Applet List, click New.

5 On the My Web Applet page, complete the following fields:

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Field	Comments
Name	Enter a name.
Location	Select Homepage or Action bar, depending on whether the external content is to appear on a homepage or on the Action bar.
Always Run	This flag determines whether a global Web applet will be executed if the applet is minimized. This flag is available only for global Web applets that are on the Action bar.

Next, complete the fields according to the type of applet you require, as described in [Creating Custom Web Applets](#) (on page 1080).

Example of Setting Up an RSS Feed Web Applet

This topic gives one example of setting up an RSS feed Web applet. You might use this feature differently, depending on your business model. This example sets up an RSS feed Web applet in the contact record detail page for users who have the Field Sales Rep role. The Web applet displays the Twitter feed for the contact.

The company administrator sets up the Twitter ID field on the Contact record type and creates the Twitter Web applet. The company administrator then adds the new field and the Twitter Web applet to the page layout for the Field Sales Rep role. Users who have the Field Sales Rep role can then enter the Twitter ID for a contact in the Contact Detail page. When a user (who has the Field Sales Rep role) populates the field with the contact's Twitter ID, the Twitter RSS feed for the contact appears in the Twitter Web applet on the Contact Detail page.

Before you begin. To set up the Twitter ID field, create the Twitter Web applet, and add the field and the applet to the page layout, you must have the Customize Application privilege in your user role.

To create an RSS feed Web applet (Company Administrator)

- 1** Set up the Twitter ID field on the Contact record type, as follows:
 - a** In the upper-right corner of any page, click the Admin global link.
 - b** In the Application Customization section, click the Application Customization link.
 - c** In the Record Types Setup section, click Contact.
 - d** In the Field Management section, click Contact Field Setup.
 - e** On the Fields page, click New Field.
 - f** In the Contact Field Edit page, enter Twitter ID in the Display Name field, and select Text (Short) in the Field Type field.

To set up the Twitter RSS feed for a contact (User)

- 1 Open an existing contact record, or create and save a new contact.
- 2 In the Contact Detail page, if the Contact Twitter Feed applet is not displayed on the page, add the applet as follows:
 - a Click Edit Layout.
 - b Use the arrows to move the Contact Twitter Feed applet from the Available section to the Displayed Information section.
 - c Save your changes.
- 3 In the Contact Detail page, click Edit.
- 4 In the Contact Edit page, in the Twitter ID field, enter the Twitter ID for the contact.
- 5 Save your changes.

The Twitter feed for the contact appears in the Contact Twitter Feed applet on the Contact Detail page.

Uploading Client Side Extensions

Client side extensions are files that you can upload to and host on Oracle CRM On Demand instead of hosting them on other servers. When you upload a client side extension, Oracle CRM On Demand generates a unique URL that you use to reference the extension. One client side extension can call a second client side extension by using the unique URL of the second client side extension, or you can also use a URL to deploy a client side extension in custom Web tabs, custom Web applets, and global Web applets.

You can upload HTML, JPG, GIF, SWF, and CSS files from the Oracle CRM On Demand Client Side Extension List page to create a client side extension. The maximum file size is 20 megabytes (MB). However, smaller file sizes provide better performance when the browser downloads these files from Oracle CRM On Demand.

NOTE: Oracle CRM On Demand Customer Care does not have access to any component of client side extensions. These components include the uploaded files or the content contained within those files, images, or locations from which the client side extensions are referenced, including custom Web tabs, custom Web applets, and global Web applets. Therefore, you are responsible for maintaining and supporting these extensions.

Before you begin. To perform this procedure, your role must include the Upload Client Side Extensions privilege. For more information on adding privileges, see [About Privileges in Roles](#) (on page 1172).

To upload a client side extension

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Application Setup section, click Client Side Extensions.

The Client Side Extensions List page displays previously uploaded client side extensions. You can also delete previously uploaded client side extensions on this page.

NOTE: If you delete a client side extension that has been set up for a custom Web tab, applet, or global Web applet, then those applets will no longer function correctly because the client side extension has been removed. Oracle CRM On Demand does not indicate if a particular client side extension is in use.

4 Click New.

5 Click the paperclip icon to find the content that you want to upload as a client side extension.

This field is required.

6 Enter the following details:

- **MIME Type.** This indicates the Internet media type. This type allows the browser to display media types properly. Enter the full details of the MIME types. Enter one of the following depending on your file type:
 - text/html
 - image/jpeg
 - image/gif
 - application/x-shockwave-flash
 - text/css
- **File: Size (In Bytes).** The size of the uploaded file. Oracle CRM On Demand populates this field.
- **File: Extensions.** The file extension of the uploaded file. Oracle CRM On Demand populates this field.
- **Name.** The name of the client side extension. This field is required.
- **URL Name.** This value is used to provide a meaningful name for the URL that points to the client side extension. The following characters are accepted in the URL name: A-Z, a-z, 0-9, underscore (_), and period (.). Double periods (..) are not permitted, and a period (.) must not be the last character in the string. Examples of URL names are: Logo_Image and Map376. It is recommended that you keep this field as short as possible. This field changes only when a user edits it. Therefore, if you replace the uploaded file, or if you change the client side extension name, then the URL Name field value is unchanged. As a result, you can update, maintain and deploy multiple versions of the client side extension without having to reconfigure the custom Web tabs, custom Web applets, or global Web tabs. Editing this field changes the Relative URL and Full URL fields. This field is required.
- **Relative URL.** Oracle CRM On Demand completes this field. This value is the relative URL that navigates to the client side extension from within Oracle CRM On Demand. If this field value changes, and the client side extension is deployed, then you must update the custom Web tabs, custom Web applets, or global Web tabs that reference this client side extension to use the newly generated URL. This field value changes only if the URL Name field is updated.
- **Full URL.** Oracle CRM On Demand completes this field. This value is the full URL that points to the URL in the Oracle CRM On Demand application. If this field value changes, and the client side extension is deployed, then you must update custom Web tabs, custom Web applets, or global Web tabs that reference this client side extension to use the newly generated URL. This field value changes only if the URL Name field is updated.

7 Click Save.

NOTE: You can upload a client side extension, but it is not active until you configure it in a custom Web tab, custom Web applet, or global Web tab.

After a client side extension is uploaded, Oracle CRM On Demand generates the Relative URL and Full URL fields. You use these values to associate a custom Web tab, custom Web applet, or global Web tab with the client side extension. You configure these locations in the same way that you configure any extension hosted on your servers.

To edit an existing client side extension

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Application Setup section, click Client Side Extensions.
- 4 In the Client Side Extensions List page, find the client side extension that you want to edit.
- 5 Do one of the following:
 - Click the Name field. This step opens the Client Side detail page where you can edit the client side extension.
 - Click Edit.
- 6 Click Save.
- 7 If you have replaced the file for the client side extension, do the following:
 - a Log out of Oracle CRM On Demand.
 - b Clear your browser cache.
 - c Log in again to download the new client side extension so that the client side extension is downloaded to the page deploying the client side extension. If you do not log out of Oracle CRM On Demand and log in again, the new client side extension will be downloaded 30 days after you have performed the first download.

Guidelines for Editing Client Side Extension

Consider the following guidelines:

- **Keep the number of references to client side extensions on a page to a minimum to reduce the negative impact on performance.**
- **Keep the size of your client side extensions as small as possible.** For example, avoid using large image or SWF files. The smaller the file that you download as part of the client side extension, the faster the page loads compared to larger files.
- **Keep all client side extensions in as few files as possible to reduce the negative impact on performance.**
- **Allow your browser to cache your client side extensions.** If you allow your browser to cache the client side extensions, then the content does not have to be downloaded from the Oracle CRM On Demand

servers each time that a user loads the page. If the client side extension changes, then you must clear your cache so that Oracle CRM On Demand loads the page containing the extension. By default, client side extensions are cached for 30 days.

- **Keep client side extensions and assets to a minimum to improve the Action bar performance.** When configuring a client side extension contained in an applet on the Action bar, the Action bar loads every time the page refreshes.
- **Follow all Web services guidelines when using client side extensions to call Web services.** For more information, see Oracle Web Services On Demand Guide.

Customizing My Homepage for Your Company

Depending on their needs, employees at your company might want to see different information on their My Homepage page. You can customize the layout of My Homepage by replacing the default content with content that is more relevant to the roles of the employees. For example, you might configure the Homepage for a customer service representative to show new service requests instead of the Recently Created Leads section that is standard on that page, and a custom service-request report instead of the standard sales pipeline quality report.

After you have customized My Homepage, you must assign the Homepage layout to a user role. All users with that role see the customized My Homepage that you set up.

Before you begin. Because you must select a role that this customization applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customize Application privilege and the Homepage Administration privilege.

To customize My Homepage for your company

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Application Setup section, click the My Homepage Layout link.
- 4 In the Homepage Layout list, do one of the following:
 - Click the New Layout button to create a new layout.
 - Click Edit or Copy to modify an existing custom layout.The Homepage Layout Wizard appears to guide you through the process.
- 5 In Step 1 Layout Name, enter a name for the layout, and a description if required.
- 6 In Step 2 Homepage Layout:
 - Move sections from the All Sections list to the Available Sections list.

The Available Sections list includes the sections that can be added to a Homepage; this includes any custom reports that you have enabled for inclusion in Homepages. If you do not want a user to add a section to a Homepage, leave the section in the All Sections list.

- Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

Leave sections that are double width in the Left Side list; they will automatically stretch across the Homepage when it is displayed

7 Click Finish.

NOTE: After you add a custom homepage to the application, you need to make it available to the user role before users can see it. For instructions, see [Adding Roles](#) (on page 1173).

Creating New Themes

The theme determines the appearance of Oracle CRM On Demand. Several predefined themes are available when Oracle CRM On Demand is first set up for a new company, the default theme is *Oracle*. You can specify which roles can create and manage themes in the Role Management Wizard. For more information on adding roles, see [Adding Roles](#) (on page 1173). For more information on specifying themes at the company level, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).

You can choose a theme at the company, role, or user level. The theme specified at the user level takes precedence, followed by the theme specified at the role level. The company default theme is applied if neither the user level nor the role level specifies a theme.

If you are upgrading themes from Oracle CRM On Demand Release 16 to Release 17, note the following:

- **For new companies.** *Oracle* is the default theme at the company level. No theme is selected at the role or user level. Company administrators can create new themes and set them as the default. They can also disable existing themes so that they cannot be selected by users.
- **For existing companies.** The names of any old themes will be replaced by the following strings: *Oracle - Deprecated*, *Contemporary - Deprecated*, or *Classic - Deprecated*. It is recommended that you change these old themes, choose one of the new themes, and remove the old themes from the user profiles.
- **For existing companies that use logos and links.** An upgrade does not affect a deprecated theme, which is still selected. However, it is recommended that you do not use old (deprecated) themes, but create new themes, and set new themes as the default at the company or role level.

Before you begin. To create and edit themes, your user role must include the Manage Themes privilege.

The following task describes how to create your own theme in Oracle CRM On Demand.

To create a new theme in Oracle CRM On Demand

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Application Setup section, click the Themes link.

4 In the Themes page, click New.

5 Enter information for the following fields:

- **Theme Name.** Enter a name for your new theme.
- **Show Default Help Link.** Select this check box if you want your new theme to display the default Help link.
- **Show Default Training and Support Link.** Select this check box if you want your new theme to display the default Training and Support link.
- **Description.** Enter a description for your new theme.

6 Click Save.

Oracle CRM On Demand opens the Theme Detail page with a dynamic preview of the new theme, which is to the right of the screen. The preview shows the Home, Detail, and List pages, with the new theme applied.

7 Enter information for the fields listed in the following table.

SHOW ME

NOTE: To enter new color codes, you can either enter a hexadecimal value for each color, or move the mouse over the default color value to display the color palette icon. Click the color palette icon to select a color for this field.

General Information	Description
Application Background	This field refers to the background of Oracle CRM On Demand, including the spaces between tabs.
Application Text	This field refers to the legal statement, which is at the bottom of the application page, and the vertical bars between the global links and tab links.
Application Links	This field refers to the global links, which are at the top and bottom of Oracle CRM On Demand, for example, Admin, My Setup, Privacy Statement, Terms of Use, and so on.
Alert Text	This field refers to the text used for mandatory fields and overdue tasks.
Tabs	
Tab Style	Select Rounded, Stacked, or Straight from the menu.
Active Tab Text	This field refers to the text used in the active tabs.
Active Tab Background	This field refers to the background color of the active tab.
Inactive Tab Text	This field refers to the text used in the inactive tabs.
Inactive Tab Background - Top	This field refers to the color of the upper background of the inactive tab.
Inactive Tab Background - Bottom	This field refers to the color of the lower background of the inactive

	tab.
Inactive Tab Background Hover	This field refers to the color displayed when you place the mouse over an inactive tab. It also refers to the color used in the menu tab.
Page	
Page Text	This field refers to all the text on the page or pop-up window, for example, inline help, field labels, field values, page titles, inactive links, form section headers, vertical bars, bullets, and so on.
Page Links	This field refers to all the links on the page background, for example, calendar links, Show Full List link, Manage List link, and so on.
Page Background - Top	This field refers to the color of the title bar at the top of each page and pop-up window, for example, Opportunity Details. Buttons are placed on this bar. This field also controls the Action bar, Related List, Calendar view, and active Calendar tab.
Page Background - Bottom	This field refers to the color of the title bar at the bottom of each page and pop-up window, for example, Opportunity Details. Buttons are placed on this bar. This field also controls the Action bar, Related List, Calendar view and active Calendar tab.
Highlighted Page Background	This field refers to the color of the highlighted items on a page, for example, the inline edit fields, highlighted cells on a calendar, current date, active step in wizards, head-up display background, and so on.
Page Header Text	This field refers to the text color used for the page names, for example, Opportunities Homepage.
Page Header Background - Top	This field refers to the color used for the upper area behind the page names.
Page Header Background - Bottom	This field refers to the color used for the lower area behind the page names.
Page Lines	This field refers to the line colors used in the list records, form sections on detail pages, in wizard steps, and so on.
Lists	
List Header Text	This field refers to the text color on the filter bar and the list footer bar.
List Header Background	This field refers to the background color on the filter bar and the list footer that contains the list navigation icons.
Column Header Text	This field refers to the text color used in the column headers.
Column Header Background	This field refers to the background color on the related lists, full lists, and so on.

8 (Optional) If you want to add customized global links to your theme, click New in the Global Links section. The Link Edit page opens.

9 Enter the following information:

- **Link Name.** Enter the name of the global link that you want to add to your theme.
- **Type.** Select Header or Footer from the menu, depending on whether you want to place your global link at the top or bottom of your page.
- **Link URL.** Enter the URL of your global link.
- **Link Order.** Enter a value to indicate the order in which the link is displayed. For example, if you enter the number one, the link is the first link in your global links.

10 (Optional) If you want to add a specific logo to your theme, click Add Logo in the Logo section.

The Logo Edit page opens.

11 Click Browse to locate the image that you want to use as the header logo in your theme.

NOTE: You can upload images to use as a header logo with the following extensions: JPEG, JPG, PNG, or GIF. The header logo must be approximately 70 pixels high and 1680 pixels wide. You must have permission to use and upload the image that you upload to your theme.

12 Enter the following information:

- **Name.** Enter the name of the logo that you want to add to your theme.
- **Logo Type.** Select Header or Footer from the menu, depending on whether you want to place your header logo at the top or bottom of your page. If you select Header, your header logo remains in the background behind the links and tabs. If you select Footer, the footer logo is placed at the links at the bottom of the application. The footer logo must be a maximum of 200 pixels wide.

13 Click Save.

NOTE: You must sign in and sign out of Oracle CRM On Demand to view the preview of the new logo that you added to the theme.

Enabling Custom Reports in My Homepage

You can specify the custom reports that can be added to a custom My Homepage layout. These custom reports are then displayed in the Available Sections list in Step 2 in the Homepage Layout Wizard. For more information about customizing My Homepage, see [Customizing My Homepage for Your Company](#) (on page 1092).

Before you begin. To perform this procedure, the custom reports that you want to enable in My Homepage must have been saved. Your role must include the Customize Application privilege and the Homepage Administration privilege.

To specify a custom Homepage report

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Application Setup section, click the My Homepage Custom Reports link.

4 In the My Homepage Custom Reports list, click New Homepage Report.

5 In the Name field, enter the name of the custom report.

6 In the Height and Width fields, select Single or Double.

If you want the report to span the entire Homepage from left to right, set the width to Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.

7 If required, select the Execute Report Immediately check box.

If you select this check box, the report will run automatically, and users will not have to click a link to update the report.

8 In the Report Path field, enter the path of the report.

You can paste the report path from the Open Analysis window. To copy the report path:

a Click the Open Analysis button in the Getting Started with Answers page.

b Select a report.

c Copy the value in the Item field.

For example:

Shared Folder: Pre-built Analysis/Sales Stage History Analytics: Last Month Sales Report

9 Click Save.

Renaming Record Types

To use terminology that is familiar to your users, you might want to rename record types. The default record type names in the application might not be the same as those used by your company for certain types of records. If this is the case, you can change the name to meet your specific requirements.

When you change the name of a record type, the new name appears in most places in the application, such as:

- Tabs and buttons
- Drop-down lists
- Predefined filtered lists, such as the All Accounts list on the Account Homepage
- Title bars on pages, such as on record detail and list pages
- The Create section in the Action bar
- Page section names
- Record assignment email notification
- Customized page section names

For example, you can change the Account display name to Company. The Account tab becomes Company and other section titles change accordingly.

However, there are several places in which the new name does not appear. If you change names, inform your users that the new names do not appear in:

- Custom filtered list names
- Custom field names
- Reports and Analyses
- Oracle Outlook Email Integration On Demand
- Oracle PIM Sync On Demand
- Help pages

NOTE: All display names have a maximum length of 50 characters.

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

To rename a record type

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Application Setup section, click the Customize Record Types link.
- 4 On the Customize Record Types page, type the new names in the appropriate row. You must supply all three variations for the application to use in the appropriate areas of the interface: Display Name/Singular, Display Name/Plural, and Display Name/Short.

NOTE: The Display Name/Short appears in the tabs, so it should not exceed 15 characters.

- 5 (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation Language drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previously translated display names remain, unaffected by the change you made here.

- 6 To manually enter the translated equivalent of the new name:
 - a From the Translation Language drop-down list, select the language whose translation you want to enter.
 - b Enter the translated equivalent in the appropriate Display Name field and click Save.
 - c Click the link to return to the page you just updated and select the language again, if necessary. The translated name appears in black text in the Display Name column.

Changing the Icon for a Record Type

You can change the icon that is associated with a record type, and which is displayed on tabs and in the Create section in the action bar.

Before you begin. To perform this procedure, your role must include the Customize Application privilege.

To change the icon for a record type

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Application Setup section, click the Customize Record Types link.
- 4 On the Customize Record Types page, click the Lookup icon in the Icon field for the record type.
- 5 Select an icon from the window.
- 6 Click Save.

Adding Record Types

You can add custom record types for your company. For example, you might want to display an Order tab for your employees to use. To add a new record type, you rename and configure one of the custom object record types in Oracle CRM On Demand.

Custom object record types must be made available for your company by Customer Care. For more information about setting up custom object record types for your company, contact Customer Care.

The overall steps for adding a record type to the application are:

- 1 Rename one of the custom object record types to meet your requirements.
- 2 Set up the fields for the record type. Define the fields to be displayed on the new record type detail page. A set of fields is automatically included on the Field Setup page. You can rename and use these fields and create custom fields based on your requirements.
- 3 Create page layouts for the customized record type as required.
- 4 Provide access to the new pages layout and related information sections for the appropriate user roles.

Each new record type you add appears in these areas:

- Create section in the Action bar
- Search section in the Action bar
- Record Homepage with a tab (a default icon appears in the tab along with its name)

By default, the new record Homepage contains two sections: record Lists section and Recently Viewed record section. You need to set up fields, page layouts (Detail and Edit pages), and so on, for each record type you add.

In general, new record types work in the same way as the record types provided by default. You can set up fields, page layouts, and list pages for them. Also, each new record type contains a default set of fields, including three fields to search on (the name field and two quick-search fields), and eight fields that you can filter or sort.

However, you cannot use new record types in:

- Assignment Manager
- forecasting
- audit trails
- Default Group Assignment (they cannot be shared through groups)

In addition, new record types have these restrictions:

- New record types cannot contain the country-specific address groups
- By default, only the Name field is required in new record types
- No duplicate checking is performed on the new record type

For information about using Web services with new record types, see [Downloading WSDL and Schema Files](#) (on page 1458).

Before you begin. Note the following:

- The custom object record types must be set up for your company by Customer Care. For more information, contact Customer Care.
- To perform this procedure, your role must include both the Customize Application privilege and the appropriate Customize Application privilege for the custom object you are using for your new record type. There are individual privileges for the Custom Object 01, 02, and 03 record types, for example, the Customize Application - Manage Custom Object 01 privilege. For other custom object record types, each privilege applies to a group of custom objects, for example, the Customize Application - Manage Custom Objects 04 through 10 privilege.

To add a record type

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Application Setup section, click the Customize Record Types link.
- 4** In the row for the custom object record type that you are using, fill in the information, for example, enter Order.

For more information, see [Renaming Record Types](#) (on page 1097). After you rename the record type, it appears under its new name in the Record Type Setup sections on the Application Customization page, replacing the link for the custom object record type.

- 5** Click Save.
- 6** In the Record Type Setup section on the Application Customization page, click the link for the new record type.

7 In the Field Management section, click the Field Setup link.

8 On the Field Setup page, you can do the following:

- (Recommended) Click Rename Fields and relabel the Name field.

The Name field is the field that the system displays for this record type. It appears in Deleted Items, the Recently Viewed section in the Action bar, and Lookup windows.

Throughout the application, each record type has a field called Name, which is preceded by the record type (Account Name, Opportunity Name, and so on). Therefore, if you are adding an Order tab, you could relabel the Name field to Order Name.

- Click New Fields and add custom fields.

The same restrictions exist for these record types as for custom fields for the default record types.

- Click Rename Fields and specify the fields to search on for this record type. Fill in the Quick Search 1 and Quick Search 2 rows with the required field names. If your company uses Targeted Search, then these fields are displayed in the Search section in the Action bar.

For example, if you are adding an Order tab, you might want to designate an Order Number field as one of these Quick Search fields. When an employee selects Order from the Search section, Order Number appears as a field to search on.

- Click Rename Fields and specify the fields to see as column headings in lists. Fill in the Indexed rows with the required field names. This determines the fields you can use to sort and filter records.

9 Set up Edit and Detail pages for the new record type.

You can add fields to the record Edit pages, group the fields into separate sections, and rename those sections.

To create relationships with other record types, add the fields (Account, Contact, Opportunity, and so on) to the page layouts. This creates a Lookup icon next to the field, where users can link existing records to this new record type.

You can add related information sections to the Detail pages.

When you add Team as a related information section, users can share this record with team members on a record-by-record basis.

NOTE: The Team related information section is supported on Custom Objects 01, 02, and 03 record types. It is not supported on other custom object record types.

For instructions, see [Customizing Static Page Layouts](#) (on page 1057).

10 (Optional) Add the new record type as a field in other record Edit pages or as a related information section in other record Detail pages.

11 Add the page layout to user roles as required. For instructions, see [Adding Roles](#) (on page 1173).

Related Topics

See the following topic for related information:

- [About Many-to-Many Relationships for Custom Objects](#) (on page 1105)

About Fields, Picklists, and Metrics

The application does not allow you to change field names or picklist values that it uses for forecasting and reports. However, some of the prebuilt lists, such as lists on Homepages, select records to include based on the picklist values. The application uses the underlying, language-independent code to determine what records to include in the standard lists. Therefore, you can rename picklist values and fields without affecting those lists.

NOTE: In Oracle CRM On Demand (the standard application), the priority of tasks is indicated in task lists by arrows. An up arrow indicates 1-High priority, no arrow indicates 2-Medium priority, and a down arrow indicates 3-Low priority.

If you change the default picklist values for the Priority field on the activity record, an arrow might not be displayed in the Priority field in task lists.

About Attachment Configurations

Depending on the record type, files can be attached to records in the following ways:

- Through the Attachments related item on parent records
- Through attachment fields

About Configuring the Attachments Related Item

On record types that support the preconfigured Attachments related item, you can configure page layouts and user roles to allow users to link multiple attachments to a parent record. Each attachment item can contain either a file or a URL. To allow users to attach files and URLs in this way, the page layouts and user roles must be configured as follows:

- The Attachments section must be available as a related information section on the page layout for the parent record type.
- The user role must have the necessary permissions for the Attachment record type.
- The access profiles for the user role must have the appropriate access to the Attachments related record type in the access setting for the parent record type.

For more information about customizing page layouts, see [Customizing Static Page Layouts](#) (on page 1057) and [Specifying Dynamic Page Layouts](#) (on page 1072). For more information about configuring user roles and access profiles, see [User Management and Access Controls](#) (on page 1106).

The following record types support the preconfigured Attachments related item:

- Account
- Activity
- Campaign
- Contact
- Custom Objects 01, 02, and 03
- Dealer

- Fund
- Fund Request
- Household
- Lead
- Opportunity
- Partner
- Program Membership
- Service Request
- Solution

Attachments can also be linked to alert records and sales stage records.

NOTE: When a user deletes a parent record that has attachments linked to it through the preconfigured Attachments related item, the attachments are also deleted.

Company administrators can view details of attachments added through the preconfigured Attachments related item. For more information, see [Managing Your Company's Attachments](#) (on page 1475).

About Configuring Attachment Fields

Attachment fields allow users to attach a single file to a record. Attachment fields are supported for the following record types:

- Custom Objects 01, 02, 03, 04, and higher
- Inventory Audit Report
- Sample Transaction

The following record types also support attachment fields. However, these record types can be used only as related items, as follows:

- Accreditation Attachment

The Accreditation Attachment record type can be made available as a related item on the Accreditation record type only.

- Application Attachment

The Application Attachment record type can be made available as a related item on the Application record type only.

- Certification Attachment

The Certification Attachment record type can be made available as a related item on the Certification record type only.

- Course Attachment

The Course Attachment record type can be made available as a related item on the Course record type only.

- Exam Attachment

The Exam Attachment record type can be made available as a related item on the Exam record type only.

- **MDF Request Attachment**

The MDF Request Attachment record type can be made available as a related item on the MDF Request record type only.

- **Partner Program Attachment**

The Partner Program Attachment record type can be made available as a related item on the Partner Program record type only.

- **Policy Attachment**

The Policy Attachment record type can be made available as a related item on the Policy record type only.

- **Special Pricing Request Attachment**

The Special Pricing Request Attachment record type can be made available as a related item on the Special Pricing Request record type only.

NOTE: In these configurations, the linked records and the attached files are not deleted from the Oracle CRM On Demand database when the parent record is deleted. For example, when a user deletes an MDF Request record, any linked MDF Request Attachment records, and the files attached to those records, are not deleted from the database

Some of these record types are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition and might not be available in your edition of Oracle CRM On Demand.

On some of these record types, the attachment fields are exposed on the standard page layout in Oracle CRM On Demand. You can expose the attachment fields on the Detail page layouts for all of the listed record types, as required. There are three attachment fields, as follows:

- **Attachment.** This field initially shows a paper clip icon on the record Edit page. After a file is uploaded, the field shows the name and size of the attachment file on the record Detail page. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. To allow users to attach a file to a record, you must expose this field on the page layout. The Attachment field cannot be used as a search field, because the file name and file size in this field are calculated values.
- **Attachment: File Name.** This is a read-only field that is automatically populated with the name of the file the user uploads. The Attachment: File Name field can be used as a search field. Exposing this field is optional.
- **Attachment: Size (In Bytes).** This field displays the size of the attachment. Exposing this field is optional.

For more information about customizing page layouts, see [Customizing Static Page Layouts](#) (on page 1057) and [Specifying Dynamic Page Layouts](#) (on page 1072).

About Configuring Custom Objects and Attachment Fields

You can configure the Custom Object record types in a number of ways to meet your company's business needs, as follows:

- You can configure a Custom Object record type as a related record type on another record type. (Custom Object record types are supported as related record types on most of the main record types in Oracle CRM On Demand.)

In such a configuration, there is a one-to-many relationship between the parent record and the linked record type. When the attachment fields are exposed on the linked record type, this configuration allows users to link multiple attachments (one on each child record) to the parent record.

For example, you can expose the attachment fields on the Detail page for Custom Object 04, and then rename Custom Object 04 so that it is labeled *Objective Attachment*. Then, you can make the new Objective Attachment record type available as a related information section on the Objective record type.

- You can configure Custom Object record types in many-to-many relationships with other record types, see [About Many-to-Many Relationships for Custom Objects](#) (on page 1105) for more information.
- You can configure a Custom Object record type for use as an attachment record type and make it available as a top-level record type, with its own tab, homepage, lists, and so on.

Such a configuration could be used to give users access to literature that is of interest to a large number of users and would also allow users to search for attachments that were uploaded to records of the custom attachment record type.

As with any record type, you must ensure that users have the appropriate access levels in their user roles and access profiles to allow them to work with the record types where attachment fields are supported. For more information about configuring user roles and access profiles, see [User Management and Access Controls](#) (on page 1106).

NOTE: If a Custom Object record type is configured as a related record on another record type, the linked Custom Object records and the attached files are not deleted from the Oracle CRM On Demand database when the parent record is deleted. In the example described previously where a custom *Objective Attachment* record type is linked to the Objective record type, if a user deletes the parent Objective record, the linked Objective Attachment records, and the attached files, are not deleted from the database.

About Many-to-Many Relationships for Custom Objects

By default, all relationships between Custom Objects 01, 02, and 03 and other record types are many-to-many. However, for all other custom object record types (for example, Custom Object 04), any relationship between the custom object record type and any other record type (including other custom object record types) is one-to-many by default.

You can create many-to-many relationships for custom object record types by using another custom object record type as an intersection table.

Example of Creating a Many-to-Many Relationship

Your company owns and manages conference centers, and provides conferencing facilities to other companies, government clients, and so on. You want to use a custom object record type to track information about events and another custom object record type to track information about the rooms that are used for each event. Each room is used for many events, and each event can use a number of rooms, so that you must have a many-to-many relationship between the record types.

To create this many-to-many relationship, you can use a third custom object record type as an intersection table to track information about each room booking, or session. You can then create a one-to-many relationship between rooms and sessions, and a one-to-many relationship between events and sessions, which gives you a many-to-many relationship between rooms and events.

The following procedure describes how to configure the record types and relationships for this example. Custom Objects 04, 05, and 06 are used for the new record types.

To configure a many-to-many relationship

1 If the custom object record types that you want to use are not set up for your company, contact Customer Care to have them set up.

2 When Customer Care has set up the custom objects, rename Custom Object 04, 05, and 06 record types to Room, Event, and Session respectively.

For information about renaming record types, see [Renaming Record Types](#) (on page 1097).

3 For each user role that requires access to the new record types, set the required level of access in Step 2 Record Type Access of the Role Management Wizard. (The required level of access is determined by you, based on user responsibilities.)

For information about setting up user roles, see [Adding Roles](#) (on page 1173).

4 For each user role that requires access to the new record types, configure the access profile for the new record types.

At a minimum, you must set up the following:

- On the new Room record type, grant View access to the new Session related information section.
- On the new Event record type, grant View access to the new Session related information section.

For more information about setting up access profiles, see [Process of Setting Up Access Profiles](#) (on page 1164).

5 Create new page layouts for the new record types:

- On the new Room record type Detail page layout, include the new Session record type as a related information section.
- On the new Event record type Detail page layout, include the new Session record type as a related information section.

For more information on setting up page layouts, see [Customizing Static Page Layouts](#) (on page 1057).

6 For each user role that requires access to the new record types, assign the page layouts that you created in Step 6 of the Role Management Wizard.

For information about setting up user roles, see [Adding Roles](#) (on page 1173).

NOTE: In addition to the configuration changes described in the preceding procedure, you can customize the new record types in the same way that you customize other record types. For information about customizing record types, see [Record Type Application Customization Page](#) (on page 1031).

User Management and Access Controls

This topic provides information on managing users and controlling access.

Before you begin. Do the following:

- Make sure that you have the appropriate privileges in your user role:
 - To set up users, your role must include the Manage Users and Access privilege or the Manage Users within the Partner Organization privilege.
NOTE: Users who have the Manage Users within the Partner Organization privilege can set up users in their own partner organization only.
 - To set up groups, profiles and roles at your company, your role must include the Manage Users and Access privilege.
 - To set up books, your role must include the Manage Books privilege.
 - To set up territories at your company, your role must include the Manage Territories privilege.
- Compare the number of licenses against the number of users that must be active. Only active users can access Oracle CRM On Demand. The total number of active users cannot exceed the number of licenses for your company. For more information on verifying the status of licenses, see [Verifying License Statuses and Active Users](#) (on page 1006).
- Read the background information on roles and access profiles. See the following topics for more information:
 - [Role Management](#) (on page 1167)
 - [Guidelines for Setting Up Roles](#) (on page 1168)
 - [Access Profile Management](#) (on page 1133)
 - [About Access Levels for Primary Record Types](#) (on page 1144)
 - [About Access Levels for Related Record Types](#) (on page 1145)
 - [Examples of Access Level Calculations](#) (on page 1153)
- Determine what profiles you will use to manage data access for books, roles and teams.
- Determine the role that you want to assign to each user and to whom each user reports. If your organization requires additional roles to accommodate multiple lines of business, create the new ones that you require.

The cumulative setup of all users at your company defines your company's reporting hierarchy and sales quotas.

Individually, for each user at your company, you must specify a user role. A user's role and associated access profile determine an employee's access to tabs, features, and records. They also determine which page layouts the employee sees when using the application.

Click a topic to see the procedure for managing users, access profiles, roles, custom books, and groups:

- [Setting Up Users](#) (on page 1109)
- [Setting Up Users' Sales Quotas](#) (on page 1121)
- [Setting Up Default Books by Record Type for a User](#) (on page 1121)
- [Changing a User's User ID](#) (on page 1122)
- [Resetting a User's Password](#) (on page 1123)
- [Reviewing Sign-In Activity for a User](#) (on page 1123)

- [Reviewing Security-Related Activities for Users](#) (on page 1124)
- [Adding Delegates for Users \(Administrator\)](#) (on page 1125)
- [Creating Inventory Periods for Users](#) (on page 1126)
- [Deactivating Users](#) (on page 1127)
- [Process of Setting Up Partner Administrators \(Administrator\)](#) (on page 1128)
- [Setting Up Users \(Partners\)](#) (on page 1129)
- [Changing a User's User ID \(Partners\)](#) (on page 1131)
- [Resetting a User's Password \(Partners\)](#) (on page 1132)
- [Deactivating Users \(Partners\)](#) (on page 1132)
- [Process of Setting Up Access Profiles](#) (on page 1164)
- [Adding Roles](#) (on page 1173)
- [Process of Setting Up Books](#) (on page 1185)
- [Verifying Book Setup for the Administrator Role](#) (on page 1186)
- [Creating Book Types and Book User Roles](#) (on page 1190)
- [Creating Books and Book Hierarchies](#) (on page 1190)
- [Associating Users with Books](#) (on page 1192)
- [Creating Access Profiles for Books](#) (on page 1195)
- [Enabling Books for Your Company](#) (on page 1196)
- [Enabling Books for Users and User Roles](#) (on page 1197)
- [Adding Books to Record Detail Page Layouts](#) (on page 1199)
- [Assigning Records to Books](#) (on page 1200)
- [Setting Up Groups](#) (on page 1206)
- [Setting Up Territories](#) (on page 1209)

TIP: Consider setting up a test user for each role. Then activate the test users to make sure the configurations are set up correctly before activating other users. Do not activate other users until you have completed all user setup activities, including access rights, role layout, reporting and data sharing hierarchy, workflow and any other business process customization. Remember to deactivate test users when testing is complete.

User Management

A user is an entity in Oracle CRM On Demand with or without the ability to interact with Oracle CRM On Demand. For example, a user can be an employee in your company, a partner, or an external application. Users can be active or inactive. Active users can interact with Oracle CRM On Demand; inactive users cannot. To interact with Oracle CRM On Demand, an active user must be authenticated according to the sign-in and password policies set up for your company. For more information about sign-in and password policies, see [About Sign-In and Password Policies](#) (on page 1007).

Each user has one assigned role. The same role can be assigned to multiple users. A role in Oracle CRM On Demand is similar to a business function that a user performs within an organization, such as a sales executive function or a service manager function. Within your organization, your business function gives you certain privileges and permissions that are unique to your business function. Similarly, within the context of Oracle CRM On Demand, a role defines the following:

- The features in Oracle CRM On Demand that a user has the privileges to use
- The set of permissions that a user is given to work with protected information
- The user interface settings that display information

For more information about roles, see [Role Management](#) (on page 1167). To manage users, do the following tasks:

- [Setting Up Users](#) (on page 1109)
- [Setting Up Users' Sales Quotas](#) (on page 1121)
- [Changing a User's User ID](#) (on page 1122)
- [Resetting a User's Password](#) (on page 1123)
- [Reviewing Sign-In Activity for a User](#) (on page 1123)
- [Reviewing Security-Related Activities for Users](#) (on page 1124)
- [Adding Delegates for Users \(Administrator\)](#) (on page 1125)
- [Creating Inventory Periods for Users](#) (on page 1126)
- [Deactivating Users](#) (on page 1127)

Related Topics

See the following topics for related information about user management:

- [About User Page Layouts](#) (on page 1119)
- [About User Delegation](#) (on page 1124)
- [User Fields](#) (on page 1111)
- [Viewing Audit Trails for Records](#) (on page 105)
- [Customizing the Audit Trail](#) (on page 1069)

Setting Up Users

When setting up a user, the following fields require special care, because they determine what the user can access, view, and do:

- **Status field.** When you first set up a user, you can allow the user to access Oracle CRM On Demand immediately by setting the user's status to Active and prompting Oracle CRM On Demand to send the necessary sign-in information to the user when you save the user record, by selecting the appropriate option on the user record.

Alternatively, if you do not want the user to access Oracle CRM On Demand until a later time, set up the user record, and set the user's status to Inactive. When you later want to allow the user to access

Oracle CRM On Demand, change the status of the user to Active, and use the reset password functionality to send the necessary sign-in information to the user by email.

- **Reports To field or Reports To (Alias) field.** The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as reports for managers and executives. The page where you set up users can contain either the Reports To field or the Reports To (Alias) field, but must not contain both of these fields. For more information about the Reports To and Reports To (Alias) fields, see [About the Reports To and Reports To \(Alias\) Fields on User Records](#) (on page 1120).

TIP: Enter users who are at the top of the reporting hierarchy first.

- **Role field.** The user's role determines the user's access to tabs, features, records, and page layouts.

NOTE: You can import your user records using the import assistant. For more information about this option, see [Import and Export Tools](#) (on page 1282).

About Sign-In Information for New Users

To sign in to Oracle CRM On Demand, a new user must have a temporary URL for Oracle CRM On Demand and a temporary password. You can prompt Oracle CRM On Demand to send the sign-in information to the user at the time that you create the user account, or you can do it at a later time, as follows:

- If you want to send the sign-in information at the time that you set up the user account, select the email check box on the user record before you save the user record for the first time.

Depending on whether you use the Quick Add button or the Add User button to create the user record, the email check boxes are named as follows:

- The Email check box on the Quick Add page
- The Email Temporary Password When I Click Save check box on the User Edit page

Note that you must select the check box before you save the record for the first time if you want the information to be sent to the user immediately. The sign-in information is sent to the user by email, in two parts:

- One email contains a temporary URL.
- The second email contains a temporary password and details of the user's sign-in ID.

- If you want to send the sign-in information to the user at a later time, do not select the email check box when you create the user record.

Later, when you want to send the sign-in information to the user, you can prompt Oracle CRM On Demand to send the information by clicking the Reset Password button on the user record. When you click the Reset Password button, the sign-in information is sent to the user by email, in two parts:

- One email contains a temporary URL.
- The second email contains a temporary password.

In this case, the email does not include details of the user's sign-in ID.

About Deleting Users

You cannot delete users. When an employee leaves your company, change the status for that user to Inactive.

Before you begin. To set up users at your company, your role must include the Manage Users and Access privilege.

To set up a user

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, do one of the following:
 - To add a new user, click New User.
 - To add several users quickly, click Quick Add.

This opens the Quick Add page for you to enter required, limited information for each user. For example, it does not allow you to specify the reporting hierarchy.

NOTE: You cannot use the Quick Add method if you have defined any other required User fields in addition to those on the Quick Add page.

After entering information in the Quick Add window, click Save. This takes you to the User List page.

- To edit a user's information, click the user's last name and, on the User Detail page, click the Edit button.
- 5 On the User Edit page, complete the information. For more information, see [User Fields](#) (on page 1111).
 - 6 Save the record.

TIP: You can limit the user records you see by creating filtered lists. For instructions, see [Working with Lists](#) (on page 69).

To open a filtered list of users

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, select an option from the drop-down list.

User Fields

When setting up a user, the following fields require special care:

- Status
- Reports To or Reports To (Alias), depending on which of these fields is present on the user page layout
- Role

Entries for these fields determine what the user can access, view, and do.

This table describes some field information for users. To see all the fields listed in this table your role must include the Manage Users and Access privilege. Some fields are read-only. Also, the fields you see might differ depending on whether you access the User Detail page by navigating from the User List page, or by drilling down on a user name in a record. These differences occur because different page layouts are used for these detail pages. For more information about user page layouts, see [About User Page Layouts](#) (on page 1119).

Field	Description
Key User Information section	
Status	<p>The status indicates whether the user is active or inactive. For information on the sequence for setting up users' passwords and activating users, see Setting Up Users (on page 1109) and Resetting All Passwords (on page 1016).</p> <p>NOTE: Oracle CRM On Demand does not allow you to delete users. When an employee leaves your company, change the Status for that user to Inactive.</p>
Reports To	<p>The manager for the user. Each user must report to a manager for reporting and forecasting purposes.</p> <p>NOTE: Depending on the user page layouts that are set up for your company, the Reports To (Alias) field might appear instead of the Reports To field. The Reports To (Alias) field shows the short identifier for the manager of the user.</p>
Partner Organization	<p>The name of the partner organization that the user belongs to. This field is populated only for users who are members of a partner organization.</p> <p>NOTE: Users who are members of a partner organization and have the Manage Users within the Partner Organization privilege in their role can add other members of their partner organization as users in Oracle CRM On Demand. If your user role allows you to set up users who are part of your partner organization, this field is read-only.</p>
Role	<p>The role assigned to the user. To learn about roles, see Role Management (on page 1167).</p>
Primary Group	<p>The group that this user has been added to. Read-only.</p>

Field	Description
Default Book for Analytics	(Optional) The user book or custom book that the user sees by default in the Book selector on the Reports Homepage and the Dashboards Homepage. This setting on the user record does not limit the user's access to data. The user can select a different book in the Book selector.
Default Book	(Optional) The user book or custom book that the user sees by default in the Book selector when working in any area other than the Reports tab. This setting on the user record does not limit the user's access to records. The user can select a different book in the Book selector.
User Detail Information section	
Alias	<p>A short identifier for the user, for example, the user's preferred name or nickname.</p> <p>If you add users through the Quick Add page, all the characters before the at sign (@) in the email address become the alias.</p>
User ID	<p>A unique system identifier for the user to sign in to Oracle CRM On Demand.</p> <p>The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:</p> <ul style="list-style-type: none"> ■ Asterisk (*) ■ Backslash (\) ■ Number sign (#) ■ Question mark (?) ■ Slash (/) ■ Tilde (~)
Email	<p>The complete email address for the user, such as isample@companysample.com. Users must have a valid email address to be granted access to Oracle CRM On Demand.</p> <p>The maximum number of characters that the email address can contain is 100.</p>
User Sign In ID	Read-only field. This value is a combination of the company sign in ID and the user ID and is the unique system identifier for the user to sign in to Oracle CRM On Demand.

Field	Description
Contact Preferences	
Never Call	If this check box is selected, the user does not receive calls from Oracle CRM On Demand Marketing.
Never Mail	If this check box is selected, the user does not receive letters or brochures from Oracle CRM On Demand Marketing.
Never Email	If this check box is selected, the user does not receive emails from Oracle CRM On Demand Marketing.
Always Send Critical Alerts	<p>If this check box is selected, the user receives emails containing important information from Oracle CRM On Demand. These messages include:</p> <ul style="list-style-type: none"> ■ Critical information about product updates and service changes for Oracle CRM On Demand and related products ■ Instructions and schedules for upgrades to major new releases ■ High priority or emergency communications to supplement normal support processes (for example, in the case of a hardware failure) <p>Only company administrators have the ability to update this check box for users. Primary contacts automatically have this check box enabled.</p> <p>NOTE: This check box is not used to determine which users receive the system alerts issued by Oracle CRM On Demand Customer Care, such as reminders for upcoming scheduled maintenance.</p>
User Geographic Information section	
Language, Locale, Currency, Time Zone	If you do not set any values in these fields, the default values that were set up for the company are used. You can change the values for the user. Users can also override these settings when they edit their personal preferences.
User Security Information	
Reporting Subject Areas	This setting defines the visibility to real-time subject area records in Oracle CRM On Demand Answers. The allowed values are: Manager

Field	Description
	Visibility and Team Visibility. If you do not set a value in this field, the default value that was set up for the company is used. You can change the value for the user. Users can also override this setting when they edit their personal preferences.
Historical Subject Areas	<p>This setting defines the visibility to historical subject area records in Oracle CRM On Demand Answers. The allowed values are Manager Visibility, Team Visibility, and Full Visibility. If you do not set a value in this field, the default set up for the company is used. You can change the value for the user. Users can also override this setting when they edit their personal preferences. The allowed values are as follows:</p> <ul style="list-style-type: none"> ■ Manager Visibility. Allows the user to see data owned by the user and data owned by the user's subordinates. ■ Team Visibility. Allows the user to see data owned by the user and data shared with the user through teams. ■ Full Visibility. Allows the user to see data owned by and shared with the user and data owned by and shared with the user's subordinates.
Role-Based Can Read All Records	This setting determines if Oracle CRM On Demand Reports uses the Can Read All Records setting. The Can Read All Records setting determines if a given user role has visibility to all records for a given object (for example, Account, Opportunity, Contact, and so on) in Oracle CRM On Demand. This setting is defined in the record type access page in the Role Management Wizard. If the Role-Based Can Read All Records setting is enabled on any object for a user role, then that user can also see all records for that specific object in Oracle CRM On Demand Reports.
External Unique ID	This field can be used to store an identifier for the user in an external system.
Integration ID	<p>This field can be used to store a value from an external system to help to identify a relationship between the user and integrated data. For user records created through the user interface, the value of the Integration ID field is as follows:</p> <ul style="list-style-type: none"> ■ If the Integration ID field is exposed in the Page Layout and no value is entered in the field, then the field shows the temporary Row

Field	Description
	<p>ID allocated to the user record before the record was first saved.</p> <ul style="list-style-type: none"> ■ If the Integration ID field is not exposed in the user page layout, then the field takes the value of the ID field of the user record. <p>For user records created through any channel other than the user interface, if no value is entered in the Integration ID field, then the field takes the value of the ID field of the user record.</p>
External Identifier for Single Sign On	<p>If your company is set up to use Single Sign-On, the company administrator can use this field when mapping users in Oracle CRM On Demand to an external system, rather than using the User Sign In ID field.</p> <p>When users view their personal profile, this field is read-only.</p>
Authentication Type	<p>Determines how the user signs in to Oracle CRM On Demand.</p> <p>If the authentication type at company level is anything other than User ID/PWD or Single Sign-On, this field is read-only on the user record. If the authentication type at company level is User ID/PWD or Single Sign-On, company administrators can select a value or leave this field blank on the user record as follows:</p> <ul style="list-style-type: none"> ■ User ID/Password Only. If this value is selected, the user must sign in using their Oracle CRM On Demand User Sign In ID and password. ■ Single Sign-On Only. If this value is selected, the user must sign in using your company's single sign-on mechanism. When this value is selected, the user cannot sign in using an Oracle CRM On Demand User Sign In ID and password. ■ User ID/PWD or Single Sign-On. If this value is selected, the user can sign in using either their User Sign In ID and password for Oracle CRM On Demand, or through your company's single sign-on method. ■ Blank. If this field is blank on the user profile, then the company-level Authentication Type setting is used for the user. <p>When users view their personal profile, this field is</p>

Field	Description
	<p>read-only.</p> <p>For more information about setting the authentication type at company level, see Setting Up Your Company Profile and Global Defaults (on page 996).</p>
Communications Settings section	
Display Click-to-Dial Popup	<p>This check box is for users who are set up with Oracle Contact On Demand. Oracle Contact On Demand renders phone numbers as links that users can click on the List and Detail pages. If you select the Display Click-to-Dial Popup check box for the user, then when the user clicks a phone number link, the user is prompted with a Click-To-Dial window before the Oracle Contact On Demand telephony system places the call.</p>
Display Communication Homepage Inbox for	<p>Select a value from the menu to determine the period during which the Communication Homepage Inbox displays activities for the user, for example, Last Month, Last Day, and so on. The shorter the period, the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all communications. The user must sign out and sign in again for a change to this setting to take effect.</p>
Display Communication Homepage recently completed activities for	<p>Select a value from the menu to determine the period during which the Communication Homepage displays recently completed activities for the user, for example, Last Month, Last Day, and so on. The shorter the timeframe, the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all activities. The user must sign out and sign in again for a change to this setting to take effect.</p>
Additional Information section	
Theme Name	<p>If you do not set a value in this field, the default theme for the company is used. You can override the default by clicking the Theme Name drop-down list and then selecting the desired theme for the user. Users can also override this setting when they edit their personal preferences.</p> <p>NOTE: Themes have no effect on how Oracle CRM On Demand behaves. If your user role has the</p>

Field	Description
	appropriate privilege, you can create new themes according to company requirements. For more information about themes, see Creating New Themes (on page 1093).
Default Search Record Type	The record type that appears in the search picklist in the Action bar when the user signs in to Oracle CRM On Demand.
Show Welcome Page on Sign In	To prevent the Welcome page from appearing each time the user signs in to Oracle CRM On Demand, clear this field. NOTE: Users can also clear the field from the Welcome page when they first sign in.
Enable Sync of Team Contacts	Determines if Oracle PIM Sync On Demand includes the synchronizing of contacts that the user owns as well as all contacts the user has access to via Contact Teams. Selecting this option prevents duplicates from being created because each team member is synching back to the same contact record in Oracle CRM On Demand.
Fund Approval Limit	This field is for users of Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition. The amount that this user can approve for each fund request when setting the status to Claim Approved. If the user tries to exceed this limit, an error message appears, and Oracle CRM On Demand prevents the fund request approval.
Enable Animation	Determines whether the display of notes in the Message Center and record Details pages is animated.
Record Preview Mode	The user's record preview mode. Depending on the setting here, the preview window opens when the user hovers a pointer over a link to a record, or when the user clicks on a preview icon that appears when the pointer is hovered over a link to a record. The preview window shows the first section of the Detail page of the record. Selecting Off in this field disables the record preview functionality for the user. The record preview setting can be specified at company level and at user level. The setting at user level overrides the default setting for the company. If this field is blank, the default record preview setting for the company is used. Users can change this setting when they edit their

Field	Description
	personal preferences.
Head-up Display	<p>If this check box is selected, the user sees links for the related information sections on a detail page at the bottom of the browser window. The links allow the user to jump to a related information section without having to scroll down the page.</p> <p>The head-up display setting can be specified at the company level and at the user level. The setting at the user level overrides the default setting for the company. If this field is blank, the default head-up display setting for the company is used. Users can change this setting when they edit their personal preferences.</p>

NOTE: Users who have the appropriate privileges (typically the company administrator) can appoint delegated users for other users. Users can also appoint delegated users for themselves. For more information about delegating users, see [About User Delegation](#) (on page 1124) and [Adding Delegates for Users \(Administrator\)](#) (on page 1125).

About User Page Layouts

You can define a number of types of page layouts for user records. The page layout types correspond to different views of the user details in Oracle CRM On Demand.

The following types of user page layouts are available from the User Application Customization page:

- **User Page Layout.** This type of page layout is used for the user detail pages that display when you drill down on a user name from a record, or from the Recently Viewed or Favorites lists. All users in the company can see these user detail pages. No related information sections are available for the page layouts of this type, therefore there is no Edit Layout link on these user detail pages.
- **User Admin Page Layout.** This type of page layout is used for the user detail pages that display from the User List page under User Management and Access Controls.
- **User Owner Page Layout.** This type of page layout is used for the Personal Detail page in My Setup. Users can control the layout of the related information sections in their Personal Detail page by navigating to My Setup, Personal Layout, and then Personal Profile Layout, as described in [Changing Your Detail Page Layout](#) (on page 619).
- **Partner Admin Page Layout.** This type of page layout is used for the user detail pages that display when partner users access user records from the Partner Self Administration link. To access the Partner Self Administration link, partner users must have the Manage Users within the Partner Organization privilege.

The separate user page layout types are useful when you have user fields that contain private data. In this situation, you do not want the private fields to be visible when a user drills down on a user name from a record. You can therefore make the private fields available in the page layouts of the User Owner layout type or the User Admin layout type, but not make the private fields available in the page layouts of the User layout type.

Page layouts are assigned to particular roles. Therefore, by assigning the appropriate page layouts to a role, you ensure that users with that role cannot see any private fields that they should not be able to see.

The following are examples of the type of field that can be useful to track as private fields for particular roles:

- Inside Sales Rep
 - Number of qualified leads that are not rejected
 - Number of leads contacted for each month
- Field Sales Rep
 - Cost of converting lead to customer
- Marketing Manager
 - Campaign effectiveness (the amount spent compared with the amount of revenue)
- Regional Sales Manager
 - Number of lost customers for each quarter
 - Volume of revenue stream lost to regional competitors

The separate user page layout types are also useful when you want to make fields read-only for some users. In this case, you make the fields available as read-only fields in the page layouts of the User Owner layout type for user roles that you do not want to be able to edit the fields.

CAUTION: Certain restrictions apply to adding the Reports To field and the Reports To (Alias) field to user page layouts. For more information, see [About the Reports To and Reports To \(Alias\) Fields on User Records](#) (on page 1120).

For more information about creating page layouts, see [Customizing Static Page Layouts](#) (on page 1057); for information about setting up roles, see [Adding Roles](#) (on page 1173).

About the Reports To and Reports To (Alias) Fields on User Records

The manager information on a user record is used in the reporting hierarchy and in forecasting. One of the following fields should be present on each page layout of the User Admin or Partner Admin layout type, so that you can specify a manager for the user:

- **Reports To.** This field shows the full name of the user's manager.
- **Reports To (Alias).** This field shows the short identifier for the user's manager.

However, when you create your user page layouts, you must not add both of these fields to the same user page layout. If the Reports To field and the Reports To (Alias) field were both made available on a page layout, then any user whose role is assigned that page layout would not be able to use the inline edit feature in lists of user records or in user detail pages.

Similarly, do not add both the Reports To field and the Reports To (Alias) field to the same search layout for the User record type. If both of these fields were made available on a search layout, then any user whose role is assigned that search layout would not be able to search for user records successfully (that is, the search would fail).

Setting Up Users' Sales Quotas

If sales representatives use Oracle CRM On Demand to manage their forecasts, their quotas must be set up. Sales representatives can set up their own quotas or, as an administrator, you can create quotas for them.

This section describes the procedure for the administrator to set up a user's quotas.

To set up a user's quota

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3** On the User Management and Access Controls page, click the User Management link.
- 4** On the User List page, click the Last Name link for the user whose quota you want to set up.
- 5** On the User Detail page, scroll down to the Quotas section and do one of the following:
 - Click the New Quota button.
 - Click the Edit link for the quota you want to edit.
- 6** On the Edit Quota page, complete the fields.
 - To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
 - To add the monthly quotas together, enter an amount for each month and click Sum.
- 7** Save the record.

Setting Up Default Books by Record Type for a User

You can determine which book a user sees by default in the Book selector for each record type. The setting on the user record does not limit the user's access to records: the user can select a different book in the Book selector.

The following procedure describes how to set up default books by record type for a user.

To set up default books by record type for a user

- 1** In the upper-right corner of any page, click the Admin global link.

- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click User Management.
- 4 On the User List page, click the Last Name link for the user whose default books you want to set up.
- 5 On the User Detail page, scroll down to the Default Book by Record Type section, and do one of the following:
 - a Click New to add a default book for a record type.
 - b Click the Edit link for the default book that you want to change.
- 6 In the Add Default Book by Record Type page, select the record type and the book setting.
- 7 Save your changes.

Changing a User's User ID

You can change the user ID for a user.

The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:

- Asterisk (*)
- Backslash (\)
- Number sign (#)
- Question mark (?)
- Slash (/)
- Tilde (~)

Before you begin. To perform this procedure, your role must include the Manage Users and Access privilege. To allow users to change their email address or user ID, you must set up the Sign In and Password Control feature. For instructions, see [Defining Your Company's Password Controls](#) (on page 1008).

To change a user's User ID

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link of the user.
- 5 On the User Detail page, click Edit.

- 6 On the User Edit page, edit the User ID field.
- 7 Save the record.
- 8 On the title bar, click the Reset Password button. The user will receive two email messages:
 - One with a temporary password, which is valid for three days.
 - One with a temporary URL for Oracle CRM On Demand. The user can use the temporary password to sign in and create a new password.

Resetting a User's Password

In Oracle CRM On Demand, users must provide answers to a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they are locked out and want immediate access, you can reset their password.

NOTE: This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before emailing the temporary password.

Before you begin. To perform this procedure, your role must include the Manage Users and Access privilege.

To reset a user's password

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user whose password you want to reset.
- 5 On the User Detail page, on the title bar, click the Reset Password button.

The user's existing password is replaced with a new temporary password. The new temporary password is sent to the user by email.

NOTE: This event is recorded in the Sign In History section on the User Detail page.

Reviewing Sign-In Activity for a User

You can review the sign-in history for each user at your company.

Before you begin. To perform this procedure, your role must include the Manage Users and Access privilege.

To review sign-in activity for a user

- 1 In the upper right corner of any page, click the Admin global link.

- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user whose sign-in activity you want to view.
- 5 To review the user's sign-in activity, scroll down to the Sign-in History section.

Reviewing Security-Related Activities for Users

The Audit related information section on the user record captures details of security-related activities, such as when the user's password was set initially and when the password was reset.

NOTE: You can also configure a field-level audit trail for user records. For information about customizing audit trails for record types, see [Customizing the Audit Trail](#) (on page 1069). You can also view audit trail information for users in the Master Audit Trail. For more information, see [Reviewing Audit Trail Changes with the Master Audit Trail](#) (on page 1024).

Before you begin. To perform this procedure, your role must include the Manage Users and Access privilege.

To review security-related activities for a user

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user that you want to view.
- 5 Scroll down to the Audit section to review details of the security-related activities on the user record.

About User Delegation

When the delegated users feature is enabled, users can delegate owner access of their records to other users. In addition, users who have the appropriate privileges (typically the company administrator) can appoint delegates for other users. The delegated users feature is controlled using the following check boxes on the Company Profile page:

- Manager Visibility Enabled
- Display Book Selector

For the delegated users feature to work, both of these check boxes must be selected. In addition, the Delegated Users related information section must be available on the relevant page layouts for the user's or administrator's role, as follows:

- To allow a user to appoint delegates, the Delegated Users related information section must be available on the User Owner page layout for the user's role.

- To allow administrators to appoint delegates for other users, the Delegated Users related information section must be available on the User Admin page layout for the administrator's role.

When appointing delegated users, note the following information:

- The Delegated User Role field is not related to the user role or to data access in anyway. It is a picklist that a company administrator can define to categorize the user delegates. This picklist does not have any default values. The company administrator can customize it, as necessary, from the Delegated Users Field setup page. For more information about customizing picklists, see [Changing Picklist Values](#) (on page 1054).
- Delegated users gain the primary user's owner access to the records that the primary user owns or has access to through teams or groups. Delegated users do not gain the primary user's default access to records.
- For any record type, the delegated user must have the Has Access option enabled in his or her user role to be able to see records of that type using delegated access. Similarly, the delegated user must have the Can Create option for a record type enabled in his or her user role to be able to create records of that type.
- Delegated users can use the Include sub-items option in the Book selector to see all of their own records and those of the primary user in lists. Alternatively, they can select their own name to see only the records they have access to through ownership, role, team, and so on. Or, they can select the name of the primary user to see only the records that the primary user owns or can access through a team or a group.
- The delegated user's level of access to data (that is, Manager Visibility, Team Visibility, or Full Visibility) for reporting subject areas and historical subject areas continues to apply, even when the delegated user is looking at data delegated by a primary user.

Adding Delegates for Users (Administrator)

As a company administrator, you can appoint users as delegates for other users. For more information about how user delegation works, see [About User Delegation](#) (on page 1124).

NOTE: Users can also appoint delegated users for themselves through their Personal Profile page. For more information on how users can appoint delegates, see [Adding Delegated Users](#) (on page 617).

Before you begin. To perform this procedure, your role must include the following privileges:

- Manage Users and Access
- Manage Users and Access - Manage Delegated Users

In addition, the Delegated Users related information section must be available on the User Admin page layout for your role. One of the following might apply:

- If the Delegated Users section is not available on the User Detail page, click Edit Layout, and move the Delegated Users section to the Displayed Related Information section.
- If the Delegated Users section is not shown in the Available Related Information section of the User Admin Layout page, you must add the Delegated Users related information section to the User Admin page layout for your role.

To add delegated users

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the User Management and Access Controls section, click User Management and Access Controls.
- 3** On the User Management and Access Controls page, click User Management.
- 4** On the User List page, click Last Name for the user for whom you want to add delegates.
- 5** On the User Detail page, scroll down to the Delegated Users section, and click Add in the title bar of that section.
- 6** On the Delegated Users Edit page, click the Lookup icon.
- 7** In the Lookup window, select the user whom you want to be a delegate.
- 8** If Delegated User Roles are defined, select the role from the list.
- 9** Save the record.

Creating Inventory Periods for Users

This topic is specific to Oracle CRM On Demand Life Sciences Edition. You must create an inventory period for each sales representative who uses Oracle CRM On Demand Life Sciences Edition. You must do this only once for each sales representative. You can create inventory periods manually, or using the import function in Oracle CRM On Demand.

NOTE: Typically, inventory periods are populated through the import function when Oracle CRM On Demand is first set up for a company.

After you create the initial inventory period for a sales representative, each time an inventory period is closed for the sales representative, a new inventory period is automatically created.

Before you begin. To perform this procedure, your role must include the Manage Users and Access privilege.

To create an inventory period for a user

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3** On the User Management and Access Controls page, click the User Management link.
- 4** On the User List page, click the Last Name link of the user.
- 5** On the User Detail page, click New Inventory Period.

The start date for the inventory period defaults to the current date.

NOTE: Oracle CRM On Demand does not display a message to confirm that the inventory period has been created for the user, and the User Detail page remains open. If you want to verify that the inventory period has been created, click the Inventory Period tab, and view the list of recently modified inventory periods.

Deactivating Users

You cannot delete a user. Instead, you need to make the user inactive. You do not need licenses for inactive users.

Before you begin. To perform this procedure, your role must include the Manage Users and Access privilege.

To deactivate a user

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user you want to remove from the system.
- 5 On the User Detail page, click the Edit button.
- 6 On the User Edit page, in the Key User Information section, select Inactive in the Status field.
- 7 Save the record.

Partner Self Administration

Company administrators can set up one or more users in a partner organization as partner administrators in Oracle CRM On Demand. Partner administrators can perform a limited set of user management task, such as setting up members of their organization as users in Oracle CRM On Demand, editing those user records, and resetting passwords or changing user IDs for those users. Partner administrators manage their users in the partner self-administration pages in Oracle CRM On Demand.

Access to the partner self-administration pages is controlled by the Manage Users within the Partner Organization privilege.

NOTE: Company administrators grant the Manage Users within the Partner Organization privilege to members of partner organizations. This privilege is not given to users in the brand owner company.

For information about setting up partner administrators, see [Process of Setting Up Partner Administrators \(Administrator\)](#) (on page 1128). For information about managing users in the partner self-administration pages, see [Managing Users in Your Partner Organization \(Partners\)](#) (on page 1128).

Process of Setting Up Partner Administrators (Administrator)

The privilege that controls access to the partner self-administration pages is the Manage Users within the Partner Organization. This privilege allows partner administrators to work with user records for members of their own partner organization only. Partner administrators do not require and must not be granted the Manage Users and Access Privilege, because that privilege allows the partner administrator to see and edit user records for users outside his or her partner organization.

For security reasons, company administrators also determine which roles partner administrators can give to users in their partner organization. To do this, you associate roles with the partner organization record. Then, when a partner administrator sets up a user, only the roles that you have associated with the partner organization are available to be given to the user. Limiting the roles that partner administrators can grant to users enables you to ensure that partner administrators cannot give their users inappropriate privileges or access to data that the users are not supposed to see.

NOTE: Associating roles with a partner record limits the choice of roles that partner administrators can give to their users. It does not limit the choice of roles that company administrators in the brand owner company can assign to the users in the partner organization.

To set up a partner administrator, perform the following tasks:

- 1 In the partner administrator's user role, grant the Manage Users within the Partner Organization privilege. For information about granting privileges to roles, see [Adding Roles](#) (on page 1173).

NOTE: You can create a new role for partner administrators, or you can edit an appropriate existing role. You can also create different roles for partner administrators in the various partner organizations.

- 2 (Optional) Create a customized Partner Admin page layout for User record type, and assign it to the user's role.

For information about creating customized page layouts, see [Customizing Static Page Layouts](#) (on page 1057). For information about assigning page layouts to roles, see [Adding Roles](#) (on page 1173).

- 3 (Optional) If you want to create specific roles for users in the partner organization, set up the roles. For information about setting up roles, see [Role Management](#) (on page 1167) and [Adding Roles](#) (on page 1173).

- 4 In the Partner Roles related information section on the partner organization record, add the roles that the partner administrator can grant to the users in the partner organization.

For more information about linking records, see [Linking Records to Your Selected Record](#) (on page 61).

- 5 If the role that you created or edited for the partner administrator is not already assigned to the user who is to act as the partner administrator, assign the role to the user.

For more information about assigning roles to users, see [Setting Up Users](#) (on page 1109).

Managing Users in Your Partner Organization (Partners)

Before you begin. To manage users in your partner organization, you must have the Manage Users within the Partner Organization privilege in your role.

You manage users in your organization in the partner self-administration pages in Oracle CRM On Demand. You access the partner self-administration pages from the global Admin link, which is available on every page in Oracle CRM On Demand.

To manage users in your partner organization, do the following:

- [Setting Up Users \(Partners\)](#) (on page 1129)
- [Changing a User's User ID \(Partners\)](#) (on page 1131)
- [Resetting a User's Password \(Partners\)](#) (on page 1132)
- [Deactivating Users \(Partners\)](#) (on page 1132)

Related Topics

See the following topic for related information about the fields on user records:

- [User Fields](#) (on page 1111)

Setting Up Users (Partners)

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

When setting up a user, the following fields determine what the user can access, view, and do. You must use them correctly.

- **Status field.** When you first set up a user, you can allow the user to access Oracle CRM On Demand immediately by setting the user's status to Active and prompting Oracle CRM On Demand to send the necessary sign-in information to the user when you save the user record.

Alternatively, if you do not want the user to access Oracle CRM On Demand until later, you can set up the user record and set the user's status to Inactive. When you later want to allow the user to access Oracle CRM On Demand, you change the status of the user to Active, and use the reset password functionality to send the necessary sign-in information to the user by email.
- **Reports To field or Reports To (Alias) field.** The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as in the reports for managers and executives. The page where you set up users can contain either the Reports To field or the Reports To (Alias) field, but must not contain both of these fields. For more information about the Reports To and Reports To (Alias) fields, see [About the Reports To and Reports To \(Alias\) Fields on User Records](#) (on page 1120).

TIP: Enter users who are at the top of the reporting hierarchy first.

- **Role field.** The user's role determines the user's access to tabs, features, records, and page layouts.

NOTE: The company administrator determines which roles you can assign to users in your partner organization.

When you create a user in your partner organization, the Partner Organization field on the user record is automatically populated with the name of your partner organization, and you cannot change it.

About Sign-In Information for New Users

To sign in to Oracle CRM On Demand, a new user must have a temporary URL for Oracle CRM On Demand and a temporary password. You can prompt Oracle CRM On Demand to send the sign-in information to the user at the time that you create the user account, or you can do it later, as follows:

- If you want to send the sign-in information at the time that you set up the user account, select the Email Password When I Click Save check box on the user record before you save the user record for the first time.

You must select the check box before you save the record for the first time if you want the information to be sent to the user immediately. The sign-in information is sent to the user by email, in two parts:

- The first email contains a temporary URL.
 - The second email contains a temporary password and details of the user's sign-in ID.
- If you want to send the sign-in information to the user later, do not select the Email Temporary Password When I Click Save check box when you create the user record.

Later, when you want to send the sign-in information to the user, you can prompt Oracle CRM On Demand to send the information by clicking the Reset Password button on the user record. When you click the Reset Password button, the sign-in information is sent to the user by email, in two parts:

- The first email contains a temporary URL.
- The second email contains a temporary password.

In this case, the email does not include details of the user's sign-in ID.

About Deleting Users

You cannot delete users. When an employee leaves your company, change the status of that user to Inactive.

The following procedure describes how to set up a member of your organization as a user in Oracle CRM On Demand.

To set up a user

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, do one of the following:
 - To add a new user, click New User.
 - To edit a user's information, click the user's last name and, on the User Detail page, click the Edit button.
- 4 On the User Edit page, complete the information.
For more information, see [User Fields](#) (on page 1111).
- 5 Save the record.

TIP: You can limit the user records that you see by creating filtered lists. For information on filtered lists, see [Working with Lists](#) (on page 69).

Any list of user records that you open shows only the users who meet the criteria in the list filter and who are members of your partner organization. The following procedure describes how to open a filtered list of users.

To open a filtered list of users

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, select an option from the drop-down list.

Changing a User's User ID (Partners)

The following procedure describes how to change the user ID for a user in your partner organization.

The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:

- Asterisk (*)
- Backslash (\)
- Number sign (#)
- Question mark (?)
- Slash (/)
- Tilde (~)

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

To change a user's user ID

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, click the Last Name link of the user.
- 4 On the User Detail page, click Edit.
- 5 On the User Edit page, edit the User ID field.
- 6 Save the record.

- 7 On the title bar, click the Reset Password button. The user will receive two email messages:
 - One with a temporary password, which is valid for three days.
 - One with a temporary URL for Oracle CRM On Demand. The user can use the temporary password to sign in and create a new password.

Resetting a User's Password (Partners)

In Oracle CRM On Demand, users must answer a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they are locked out and want immediate access, you can reset their password.

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

NOTE: This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before sending an email with the temporary password.

The following procedure describes how to reset the password for a user in your partner organization.

To reset a user's password

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, click the Last Name link for the user whose password you want to reset.
- 4 On the User Detail page, on the title bar, click the Reset Password button.
The user's existing password is replaced with a new temporary password. The new temporary password is sent to the user by email.

NOTE: This event is recorded in the Sign In History section on the User Detail page.

Deactivating Users (Partners)

You cannot delete a user. Instead, you must make the user inactive. Inactive users do not require a license. The following procedure describes how to deactivate a user in your partner organization.

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

To deactivate a user

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.
The User List page opens, showing a list of the users in your partner organization.

- 3 On the User List page, click the Last Name link for the user you want to remove from the system.
- 4 On the User Detail page, click the Edit button.
- 5 On the User Edit page, in the Key User Information section, select Inactive in the Status field.
- 6 Save the record.

Access Profile Management

In Oracle CRM On Demand, you manage access profiles in the Access Profiles List page and in the Access Profile Wizard. You access the access profile pages from the global Admin link, which is available on every page in Oracle CRM On Demand.

An *access profile* in Oracle CRM On Demand is a named collection of permissions on primary record types and related record types.

A *primary record type* is a record type that can be used as an independent record type. A *related record type* is a record type that must have a parent record.

Many primary record types can also be used as related record types. For example, Opportunities is a related record type. It is based on the Opportunity primary record type and is related to parent account records that are based on the Account record type.

A *permission* is the ability to read, create, update, or delete data on records that are instances of record types. Permissions are also referred to as access rights or access levels. For each record type, such as accounts, contacts, service requests, and so on, you can set up permissions for the record type itself. For some record types, you can also set up permissions for related record types.

You can set up many access profiles consisting of different permissions for primary record types and related record types. To grant these permissions to authenticated users (including external systems), you associate the access profiles with roles, books, teams, and groups.

Oracle CRM On Demand provides a set of predefined access profiles. The following are some of the standard access profiles:

- Edit
- Full
- ReadOnly
- Administrator Default Access Profile
- Administrator Owner Access Profile

Typically, access profiles are named to distinguish between default access profiles and owner access profiles. (In the list of predefined access profiles, there are pairs of access profiles with the terms *Default* and *Owner* in their names.) These terms help you to identify which access profiles to use in the access profile assignments on user roles, where an owner access profile and a default access profile must be assigned.

The Edit, Full, and ReadOnly access profiles are generic access profiles that can be granted to any role, team, or book member. For example, you can assign the Full access profile to the Owner Access Profile of the Administrator role. This profile gives a user who has the Administrator role the ability to create related records on top-level records, and to retrieve, update, or delete records of all primary record types and their related record types.

You can use the predefined access profiles, edit the existing access profiles, and create custom access profiles to meet the requirements of your company. When creating a new access profile, you have the option of copying an existing access profile, giving it a new name, and then editing the copy to meet your requirements.

To view, create or revise access profiles at your company, your role must include the Manage Users and Access privilege. It is recommended that only company administrators are given the privilege required to manage access profiles, because access profiles directly affect the security of protected data.

Related Topics

See the following topics for related information:

- [About Access Profiles in Roles](#) (on page 1134)
- [About Access Profiles in Teams, Groups, and Books](#) (on page 1136)
- [About Access Propagation Through Team Inheritance](#) (on page 1136)
- [How Access Rights for Displaying Primary Record-Type Records are Determined](#) (on page 1138)
- [How Access Rights for Working with Primary Record-Type Records are Determined](#) (on page 1138)
- [How Access Rights for Displaying Related Record-Type Records are Determined](#) (on page 1140)
- [How Access Rights for Working with Related Record-Type Records are Determined](#) (on page 1142)
- [Working with the Access Profile List Page](#) (on page 1143)
- [About Access Levels for Primary Record Types](#) (on page 1144)
- [About Access Levels for Related Record Types](#) (on page 1145)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

About Access Profiles in Roles

Each role in Oracle CRM On Demand has two access profile assignments:

- A default access profile assignment
- An owner access profile assignment

You can assign an access profile to multiple roles, and you can assign the same access profile to be both the default access profile and the owner access profile on a role. For example, you can assign the Full access profile (one of the predefined access profiles) as the default and owner access profiles for the Administrator role.

You assign access profiles to a role in step 3 of the Role Management Wizard. For more information about adding roles, see [Adding Roles](#) (on page 1173).

Default Access Profile

The default access profile on a role controls the access rights of a user to records that are not owned by that user, but are visible to the user because the Can Read All Records option is selected for the relevant record type in the record-type access settings on the user's role.

If the Can Read All Records check box on the user's role is not selected for a record type, the user has no access to that record type through the role, and the default access profile on the user role is never used for that record type.

According to the naming convention for access profiles, access profiles that are set up to be assigned as default access profiles are named as follows:

role name Default Access Profile

where:

- *role name* is the name of the role where the access profile is to be used.

For example, the name *Administrator Default Access Profile* indicates that this access profile controls access rights to record types and their related record types for the Administrator role.

Owner Access Profile

The owner access profile on a role controls the access rights of a user to records that are owned by that user or owned by a subordinate of the user.

According to the naming convention for access profiles, access profiles that are set up to be assigned as owner access profiles are named as follows:

role name Owner Access Profile

where:

- *role name* is the name of the role where the access profile is to be used.

For example, the name *Service Manager Owner Access Profile* indicates that this access profile controls access rights to record types and their related record types for the Service Manager role.

Related Topics

See the following topics for related information about access profiles:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

See the following topics for related information about roles:

- [Role Management](#) (on page 1167)
- [Guidelines for Setting Up Roles](#) (on page 1168)
- [Working with the Role List Page](#) (on page 1169)
- [About Record Type Access in Roles](#) (on page 1170)
- [About Access Profiles in Roles](#) (on page 1134)
- [About Privileges in Roles](#) (on page 1172)
- [Adding Roles](#) (on page 1173)

About Access Profiles in Teams, Groups, and Books

Access profiles are used to give access rights to users who are members of teams or groups (through user books), and to users who are associated with custom books. (Access profiles are also assigned to roles, as described in [About Access Profiles in Roles](#) (on page 1134).) Assigning access profiles to users for teams and books allows users to access records that they would not be able to access if they were restricted to the access rights provided by the access profiles assigned to their role.

NOTE: In Oracle CRM On Demand, a default book is assigned to each user and bears the user's name. When a record is assigned to a user, the record is assigned to the user's default book. Where a record is owned by a team, the team represents the set of default books of the users who are members of the team. When a user becomes a member of a team, the user book for that user is added to the set of user books that makes up the team. User books are automatically associated with records when the record owner is changed and when team membership is changed.

Groups are predefined teams that are supported for certain record types. When the owner of a record is a member of a group, other members of that group are automatically added to the team on that record. When the group members are added to the team, their access profile in the team is set to Full. The owner of the record can then edit the team access profile assignment of each group member and assign a different team access profile to that user.

Each user book in a team must be given an access profile that controls the user's access rights to the records that they can access through their membership of the team. You can make any access profile available for assignment to team membership by selecting the Grantable to Team Members check box on the access profile.

Similarly, each user associated with a custom book must be given an access profile that controls the user's access to records in that custom book. You can make any access profile available for assignment to a user's association with a book by selecting the Grantable to Book Users check box on the access profile.

For more information about user books and custom books, see [Book Management](#) (on page 1177).

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

About Access Propagation Through Team Inheritance

Team inheritance is available as an option for contacts and opportunities that are related to a parent account. Team inheritance is not supported for any other type of team relationship.

NOTE: When a user becomes a member of a team, the user book for that user is added to the set of user books that makes up the team.

Team inheritance is controlled by the Enable Parent Team Inheritance check box on the Company Profile page. If the Enable Parent Team Inheritance check box is selected on the Company Profile page, then membership of account, contact, and opportunity teams is inherited as follows:

- When a contact is related to a parent account:

- Each account team member (including the account owner) becomes a member of the contact team, provided that an access profile is specified in the Contact Access field in the user record on the account team.
- The owner of the account is granted the Full access profile for membership of the contact team by default, even if the Full access profile is deactivated.
- When an opportunity is related to a parent account:
 - Each account team member (including the account owner) becomes a member of the opportunity team, provided that an access profile is specified in the Opportunity Access field in the user record on the account team.
 - The owner of the account is granted the Full access profile for membership of the opportunity team, even if the Full access profile is deactivated.
- When a new member is added to an account team:
 - The new member also becomes a member of the contact team for each contact related to the account, provided that an access profile is specified in the Contact Access field in the user record on the account team.
 - The new member also becomes a member of the opportunity team for each opportunity related to the account, provided that an access profile is specified in the Opportunity Access field in the user record on the account team.
- When an account owner is changed:
 - The new owner becomes a member of the opportunity and contact teams for all related opportunity and contact records.
 - The previous account owner remains on the opportunity and contact teams where the previous account owner was already added.
- When a user is removed from an account team, the user remains a member of the opportunity and contact teams where the user was added through team inheritance.

Team inheritance might grant too much access to the account team members who become members of contact and opportunity teams on related contacts and opportunities. If so, you can clear the Enable Parent Team Inheritance check box on the Company Profile page to disable team inheritance.

If the Enable Parent Team Inheritance check box on the Company Profile is not selected, then membership of account, contact, and opportunity teams behaves as follows:

- The contact and opportunity access fields in the user records on account teams are not displayed.
- Users added as new members of account teams are not added to the contact and opportunity teams on the contacts and opportunities added to the account.
- If the Enable Parent Team Inheritance check box was previously selected on the company profile, users who became members of teams through the team inheritance feature, remain as members of those teams.

NOTE: Oracle CRM On Demand does not distinguish between users who are added to a team through the team inheritance feature, and users who are added to a team manually (that is, the user books that are added to a team through the team inheritance feature are treated the same as user books that are added to a team manually).

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

How Access Rights for Displaying Primary Record-Type Records are Determined

When a user tries to view a list of records of a primary record type by clicking a tab, or performing a search, or using a Web service, Oracle CRM On Demand uses the following process to determine the access rights of the user to records of that record type:

- Oracle CRM On Demand determines the permissions given to the user by the privileges on the user role.
- Oracle CRM On Demand determines the permissions given to the user by the record-type settings on the user role (Has Access, Can Create, and Can Read All Records).

If the user's privileges allow the user to work with records of a given record type, and the Can Read All Records setting is selected for the record type on the user role, the user can see all records of that record type.

If the user's privileges allow the user to work with records of a given record type, but the Can Read All Records setting is not selected for the record type on the user role, the user can see any records of that record type that the user owns, as well as any records of that record type that the user is authorized to see through any of the following access-control components:

- The reporting hierarchy
- Membership of custom books
- User delegation
- Team membership

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

How Access Rights for Working with Primary Record-Type Records are Determined

When a user tries to update, delete, or drill down to see more details on a primary record, Oracle CRM On Demand uses the following process to determine what actions the user can perform on the record:

- Oracle CRM On Demand determines the access levels granted by the access profile on the user's role:

- If the user is the owner of the record, the user's owner access profile is used.
- If the user is not the owner of the record, but the Can Read All Records option is selected for the record type on the user's role, the user's default access profile is used.
- Oracle CRM On Demand determines the access levels granted by each of the following access-control components:
 - The reporting hierarchy
 - Membership of custom books
 - User delegation
 - Team membership

More information about how Oracle CRM On Demand determines the access levels granted by the reporting hierarchy, membership of custom books, user delegation, and team membership is provided in the rest of this topic. Oracle CRM On Demand always uses the most permissive level of access from each of these access-control components, so keep this in mind when you create access profiles and assign them to users, books, and teams.

The combination of the access permissions for the record determines what actions the user can perform on the record. If the user has at least read-only access to the record, the record details are displayed. Otherwise, the user sees an error message.

Access Rights from the Reporting Hierarchy

To determine the access rights that can be granted through a user's position in the reporting hierarchy, Oracle CRM On Demand considers the following for each subordinate of the user:

- If the subordinate is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the current user.
- If the subordinate is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the subordinate as a team member.

NOTE: If the subordinate is not the record owner or a member of the team for the record, the subordinate does not contribute to the access calculation.

Oracle CRM On Demand then considers all of the access rights that subordinates contribute to the access calculation and calculates the most permissive access level that can be given to the user.

Access Rights from Membership of Custom Books

To determine the access rights that can be granted through a user's membership of custom books, Oracle CRM On Demand considers the following:

- If the record is associated with a book, then Oracle CRM On Demand extracts the access level for the record type from the access profile assigned to the user who is a member of the book.
- If the record is associated with a child book in a book hierarchy with multiple levels, such as grandparent, parent, and child, then the access level is extracted as follows:
 - If the user is a member of all three books, then the access level is derived from the access profiles of the user from each of the grandparent, parent and child books.

- If the user is a member of the grandparent book only, then the access level is derived from the access profile of the user from the grandparent book.

In all cases, if one or more of the access levels for the record is Inherit Primary, then the inherited access level of the primary record type is used. If more than one access level for the record is Inherit Primary, then a union of the inherited access levels of the primary record types from each access profile is used. Oracle CRM On Demand then considers all levels of access that book membership contributes to the final access calculation and determines the most permissive access level that can be given to the user.

Access Rights from User Delegation

To determine the access rights that can be granted through user delegation, Oracle CRM On Demand considers the following for each delegator (that is, each user for whom the current user is a delegate):

- If the delegator is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the delegator.
- If the delegator is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the delegator in the team.
- If the subordinate of the delegator is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the subordinate.
- If a subordinate of a delegator is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the subordinate in the team.

Oracle CRM On Demand then considers all levels of access that user delegation contributes to the access calculation and determines the most permissive access level that can be given to the user.

Access Rights from Team Membership

If the user is a team member on a record (but is not the owner of the record), Oracle CRM On Demand extracts the access level for the primary record type from the access profile on the user's team membership.

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

How Access Rights for Displaying Related Record-Type Records are Determined

When a user successfully views the Detail page for a record, Oracle CRM On Demand uses the following process to determine which related records the user can see:

- Oracle CRM On Demand verifies that the user's role has the necessary privileges to view the record type. If the user's role does not have the necessary privileges to view the record type, the records of this related record type are not shown.

- If the related record type is based on a primary record type, Oracle CRM On Demand verifies that the Has Access check box for the related record type is selected. If the Has Access check box is not selected for the related record type, the records of this related record type are not shown.
- If the owner of the parent record is the current user, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is the current user's subordinate at any level in the reporting hierarchy, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is an unrelated user:
 - If the Can Read All Records option is selected for the related record type on the current user's role, Oracle CRM On Demand extracts the access level for the related record type from the current user's default access profile.
 - If the Can Read All Records option is not selected for the related record type on the current user's role, the current user's default access profile is not used.

In this case, the current user gains access to the Detail page of the parent record in one or more of the following ways:

- The current user is a member of the team on the parent record.
- The current user has a direct or indirect subordinate who has access to the parent record.
- The current user is a member of a book that contains the parent record, or the parent record is in a subbook of a book where the current user is a member.
- The current user has been delegated by another user who has access to the parent record.

Oracle CRM On Demand therefore extracts the access levels for the related record type from the access profiles for the parent record through each of the applicable access-control components.

- Oracle CRM On Demand then evaluates all the related access levels to determine if the Inherit Primary access level is present in the set of access levels and determines what records to display, as follows:
 - If the Inherit Primary access level is not found:
 - If the most permissive access level is No Access, then the related records are not shown.
 - If the most permissive access level is anything other than No Access, then all related records are shown, including records the current user is not authorized to see.
 - If the Inherit Primary access level is found, and the Can Read All Records check box is selected for the related record type in the current user's role, then all related records are displayed.
 - If the Inherit Primary access level is found, and the Can Read All Records check box is not selected for the related record type in the current user's role, then the set of related records that are shown includes all records where any one of the following is true:
 - The current user owns the related record.
 - The current user is a member of the team on the related record.
 - The current user has a direct or indirect subordinate who has access to the record.
 - The current user is a member of a book that contains the related record, or the related record is in a subbook of a book where the current user is a member.

- The current user has been delegated by another user who has access to the related record.

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

How Access Rights for Working with Related Record-Type Records are Determined

When a user attempts to update, delete, or drill down to see more details on a related record, Oracle CRM On Demand uses the following process to determine what actions the user can perform on the record:

- If the owner of the parent record is the current user, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is the current user's subordinate at any level in the reporting hierarchy, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is an unrelated user:
 - If the Can Read All Records option is selected for the related record type on the current user's role, Oracle CRM On Demand extracts the access level for the related record type from the current user's default access profile.
 - If the Can Read All Records option is not selected for the related record type on the current user's role, the current user's default access profile is not used.

In this case, the current user gains access to the Detail page of the parent record in one or more of the following ways:

- The current user is a member of the team on the parent record.
- The current user has a direct or indirect subordinate who has access to the parent record.
- The current user is a member of a book that contains the parent record, or the parent record is in a subbook of a book where the current user is a member.
- The current user has been delegated by another user who has access to the parent record.

When access to the related record is granted through the context of the parent record, Oracle CRM On Demand extracts the appropriate access level for the related record type from the access profiles for each of the applicable access-control components.

- For the related record, Oracle CRM On Demand also extracts the access levels from the current user's relationship to the related record where any one of the following is true:
 - The current user is a member of the team on the related record. If the current user is the owner of the related record, the user is also on the team, therefore the owner access profile is used.
 - The current user has a direct or indirect subordinate who has access to the related record.

- The current user is a member of a book that contains the related record or the related record is in a subbook of a book where the current user is a member.
- The current user has been delegated by another user who has access to the related record.
- Oracle CRM On Demand then evaluates all the applicable access levels to determine if the Inherit Primary access level is present in the set of access levels:
 - If the Inherit Primary access level (or any of its combinations) is found in the set of applicable access levels, the related record type inherits the role settings of its own primary record type as well as the access settings. The Inherit Primary access level setting determines the actions the user can perform on the records. If Oracle CRM On Demand finds two or more Inherit Primary access levels, the combination of the access levels is determined. For more information about the Inherit Primary access level and its combinations, see [About Access Levels for Related Record Types](#) (on page 1145).
 - If the Inherit Primary access level (or any of its combinations) is not found in the set of applicable access levels, then, if the related record type has a corresponding primary record type, Oracle CRM On Demand determines the intersection of the access levels for the primary record type and the related record type.

For example, if the access level for the Opportunities related record type is Read-Only, and the access level for its corresponding Opportunity primary record type is Read/Edit, then the intersection of the access levels is Read-Only.

The combination of all the resulting access levels for the related record type determines what actions the user can perform on records of that record type.

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

Working with the Access Profile List Page

On the Access Profile List page, you can perform the actions in the following table.

To do this	Follow these steps
Add a new access profile	<p>In the title bar of the Access Profile List page, click New. The Access Profile Wizard opens.</p> <p>For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 1164).</p>
Add a new access profile by copying an existing access profile	<p>In the record-level menu beside the access profile name, select Copy. The Access Profile Wizard opens.</p> <p>For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 1164).</p>
Disable an access	Select the Disabled check box for the access profile.

To do this	Follow these steps
profile	When you disable an access profile, it cannot be used in any new associations with roles, teams, or books. However, the disabled access profile continues to function as the access profile where it has been associated previously with a role, team, or book until you assign a different access profile to the role, team, or book.
Select a language for viewing the list of access profiles	<p>In the title bar of the Access Profile List page, in the Translation Language field, select the language in which you want to view the list of access profiles. You can view the list in any of the languages that are supported for your company in Oracle CRM On Demand.</p> <p>NOTE: If an existing access profile does not have a translated access profile name, the name of the access profile is not translated and appears in brackets.</p>

You can use Alpha Search to filter the list of access profiles. For more information about Alpha Search, see [Filtering Lists](#) (on page 77).

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

About Access Levels for Primary Record Types

You grant or revoke access rights to primary record types by setting the access levels in step 2 of the Access Profile Wizard. For more information about using the Access Profile Wizard, see [Process of Setting Up Access Profiles](#) (on page 1164).

Access levels are the lowest level of permissions that can be granted for a record type. For each primary record type, you specify the access rights for any user who inherits this access profile through one or more of the access-control components (roles, reporting hierarchy, teams, and books). For example, when a user drills down on an opportunity from an opportunity list, the access rights that allow the user to see the opportunity details and to perform operations are controlled by the access level for the Opportunity primary record type in step 2 of the Access Profile Wizard.

The description in this section of the access levels for primary record types pertains to the functionality of the access levels as they operate individually. The records that a user can view and the operations that a user is allowed to perform on records are controlled by a combination of one or more access levels that are applied to the records through one or more access profiles.

Record types that are controlled through special privileges appear in all access profiles with the access level set by default. For primary record types, the default setting is Read-Only. You must change the default setting to give your users the access level that they require for the various record types.

The access level for each primary record type can be set to one of the following:

- **Read-Only.** The Read-Only access level prevents the user from performing operations such as edit or delete on the primary record.
- **Read/Edit.** The Read/Edit access level allows the user to view and edit primary records.
- **Read/Edit/Delete.** The Read/Edit/Delete access level allows the user to view, edit, and delete primary records.

NOTE: Permission to create records of a primary record type is not controlled by the settings in step 2 of the Access Profile Wizard. The permission to create records of a primary record type is controlled by the settings in step 2 of the Role Management Wizard. For more information about roles, see [Role Management](#) (on page 1167).

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

About Access Levels for Related Record Types

You grant or revoke access rights to related record types in step 2 of the Access Profile Wizard. For more information about using the Access Profile Wizard, see [Process of Setting Up Access Profiles](#) (on page 1164).

Related record types that are controlled through special privileges appear in all access profiles with the access level set to No Access by default. You must change the default setting to give your users the level of access that they require to the various record types.

For example, the Custom Object 04 record type is a related record type on the parent Opportunity record type. In the Full access profile, the Custom Object 04 related record type has its access level set to No Access by default. As a result, a user who is on an opportunity team with the Full access profile cannot see the related record types based on the Custom Object 04 related record type. If you want the user to see the Custom Object 04 records on opportunity records, you must change the default access level.

This topic describes the following:

- Record Relationships
- Access Level Options for Related Record Types

Record Relationships

The relationship between a parent record type and its related record type (the child record) determines the access-level options that are available for assignment to the related record type.

The relationships types and the available access level options are as follows:

- **One-to-Many Relationship.** In a one-to-many relationship, the child records are based on a primary record type, and one parent record can have many child records. For example, in the Account Related Information page, Opportunities is a related record type that has a corresponding primary record type called Opportunity. The following access levels are available for the one-to-many relationship:

- View
- Read-only
- No Access
- Inherit Primary

NOTE: The Inherit Primary access level is available for certain one-to-many relationships only.

- **One-to-Child Relationship.** The one-to-child relationship is similar to the one-to-many relationship, in that a parent record can have many child records. However, in a one-to-child relationship, the child records are based on a record type that does not have a corresponding primary record type. Attachments, Notes, and Teams are some examples of related record types that do not have a corresponding primary record type.

NOTE: An exception to this rule is the relationship between contact child records on an opportunity. Although the Contact record type has a corresponding primary record type, the relationship between the opportunity and the contacts is a one-to-child relationship. Users can add existing contacts to an opportunity, or remove contacts from an opportunity. Users cannot create new contacts from an opportunity.

The following access levels are available for the one-to-child relationship:

- Read/Create
- Read/Create/Edit
- Read/Edit
- Read/Edit/Delete
- Read-Only
- No Access
- Full

- **One-to-Read-Only Relationship.** The one-to-read-only relationship is similar to the one-to-child relationship. However, as the name of the relationship suggests, users cannot edit or create the child records in a one-to-read-only relationship. Audit Trail is an example of a related record type that does not have a corresponding primary record type. Oracle CRM On Demand creates the Audit Trail record type. The following access levels are available for the one-to-read-only relationship:

- Read-Only
- No Access

- **Many-to-Many Relationships.** The many-to-many relationship is a relationship between two primary record types in which the records of each record type can be the parent or child of the other, depending on how you view the relationship. For example, an account can have many contacts. Conversely, a contact can have many accounts. The following access levels are available for the many-to-many relationship:

- Read/Create
- Read-Only
- View
- No Access
- Inherit Primary

- Add/Inherit Primary
- Add/Remove/Inherit Primary

NOTE: The Add/Inherit Primary and Add/Remove/Inherit Primary access levels are available for selected many-to-many relationships only.

Access Level Options for Related Record Types

The full set of access level options for related record types is as follows:

- **No Access.** The No Access option is available for all related record types. It prevents the user from viewing records in a related list.
- **Read-Only.** The Read-Only access level prevents the user from editing the related records inline on the parent record.
- **Read/Create.** The Read/Create access level is available for related record types that are one-to-child records or are part of many-to-many relationships. For one-to-child records, the Read/Create access level allows the user to create a new record or drill down on existing records to view the details, but it does not allow the user to edit or delete records. For many-to-many relationships, the Read/Create access level allows the user to associate an existing record as a child on a parent record, but it does not allow the user to remove an existing association.
- **Read/Create/Edit.** The Read/Create/Edit access level is available for related record types that are one-to-child records. It allows the user to create a new record or drill down on existing records to view the details and edit the record if required. The Read/Create/Edit access level does not allow the user to delete child records.
- **Read/Edit.** The Read/Edit access level is available for all relationships except related records that are read-only in one-to-read-only relationships. The Read/Edit access level allows the user to view and edit related records.
- **Read/Edit/Delete.** The Read/Edit/Delete access level is available for related record types that are child records in one-to-child relationships. The Read/Edit/Delete access level allows the user to drill down on existing records to view the record details, to edit the record, or to delete the record. The Read/Edit/Delete access level does not allow the user to create new child records.
- **Full.** The Full access level is available for related record types that do not have a corresponding primary record type. For such record types, the Full access level allows the user to create, view, edit, and delete records.
- **View.** The View access level is available for related record types in one-to-many and many-to-many relationships only. With the View access level, the behavior of the related records is as follows:
 - All the child records that are related to a parent record are shown in the list of related records, irrespective of whether the user is authorized to see the child records themselves.
 - Each related record inherits the access level from its own primary record type rather than the access level of the parent record type in the relationship.

For example, if the access level is set to View for the related Opportunity record type on the Account parent record type, then the behavior of the related opportunity records is as follows:

- All opportunities that are related to a parent account record are shown in the list of related records, irrespective of whether the user is authorized to see the opportunity records.

- Each opportunity record inherits the access level from the primary Opportunity record type and not from its parent Account record type. When a user attempts to drill down on a related opportunity record to see more details of the record, the operation is successful if the opportunity record still exists, and only if the user is authorized to see the details of that opportunity record. If the user is not authorized to see the details of that opportunity record, then the user sees an error message.
- **Inherit Primary.** The Inherit Primary access level is available for certain one-to-many and many-to-many related record types only. With the Inherit Primary access level, the behavior of the related records is as follows:
 - Only the related child records that the user is authorized to see are shown in the list of related records.
 - Each related record inherits the access level from its own primary record type rather than the access level of the parent record type in the relationship.

For example, if the access level is set to Inherit Primary for the related Opportunity record type on the Account parent record type, then the behavior of the related opportunity records is as follows:

- Only those related opportunity records that the user is authorized to see are shown in the list of related records.
- Each opportunity record inherits the access level from the primary Opportunity record type and not from its parent Account record type. When a user attempts to drill down on a related opportunity record to see more details of the record, the operation is always successful if the opportunity record still exists, because the user is authorized to see the details of all of the opportunity records in the list of related records.

For many-to-many relationships, selecting the Inherit Primary access level means that the user cannot add or remove a relationship between two existing records. However, the Inherit Primary access level is also available in combination with the Add access right, or in combination with the Add and Remove access rights.

NOTE: If the Inherit Primary access level (or any of its combinations) is found on any of the profiles used for a related record type, the Inherit Primary setting takes precedence. For example, if the Inherit Primary and View access levels are both found, the Inherit Primary access level overrides the View access level. If the Inherit Primary, Read-Only, and View access levels are all found, the Inherit Primary access right overrides the View and Read-Only access levels.

- **Add/Inherit Primary.** The Add/Inherit Primary access level is available for related records that share a many-to-many relationship with the parent. The Inherit Primary element of the Add/Inherit Primary access level works in the same way as the Inherit Primary access level. However, the Add/Inherit Primary access level also allows the user to associate an existing related record with the parent record. If a related record is successfully added, that record inherits the access level of its primary record. The Add/Inherit Primary access level does not allow users to remove an existing related record.
- **Add/Remove/Inherit Primary.** The Add/Remove/Inherit Primary access level is available for related records that share a many-to-many relationship with the parent. The Inherit Primary element of the Add/Remove/Inherit Primary access level works in the same way as the Inherit Primary access level. However, the Add/Remove/Inherit Primary access level also allows the user to associate an existing related record with the parent record, or to remove (dissociate) the link between the records. When a user removes or dissociates a related record, the record is not deleted and remains in the database. If a related record is successfully added, that record inherits the access level of its primary record.

The following table shows the relationships where the Inherit Primary access level is available. The relationships in this table are one-to-many relationships.

NOTE: If the access level is currently set to View for any of the relationships indicated in the following table, then it is recommended that you change the access level from View to Inherit Primary.

Parent Record Type	Related Record Type
Account	Business Plans
Account	Calls
Account	Completed Activities
Account	Custom Object 04 and higher
Account	Objectives
Account	Open Activities
Account	Opportunities
Account	Plan Accounts
Accreditation	Accreditation Requests
Accreditation	Custom Object 04 and higher
Activity	Custom Object 04 and higher
Activity	Message Responses
Application	Activities
Broker Profile	Custom Object 04 and higher
Business Plan	Accreditation Requests
Business Plan	Activities
Business Plan	Business Plans
Business Plan	Certification Requests
Business Plan	Custom Object 04 and higher
Business Plan	Objectives
Business Plan	Plan Accounts
Business Plan	Plan Contacts
Business Plan	Plan Opportunities
Campaign	Completed Activities
Campaign	Custom Object 04 and higher
Campaign	Open Activities
Certification	Certification Requests
Certification	Custom Object 04 and higher

Parent Record Type	Related Record Type
Claim	Activities
Contact	Certification Requests
Contact	Course Enrollments
Contact	Custom Object 04 and higher
Contact	Exam Registrations
Contact	Objectives
Contact	Plan Contacts
Course	Course Enrollments
Course	Custom Object 04 and higher
Custom Object 01	Custom Object 04 and higher
Custom Object 02	Custom Object 04 and higher
Custom Object 03	Custom Object 04 and higher
Custom Objects 04 and higher	Activities
Custom Objects 04 and higher	Custom Object 04 and higher
Custom Objects 04 and higher	Opportunities
Deal Registration	Activities
Deal Registration	Custom Object 04 and higher
Dealer	Completed Activities
Dealer	Custom Object 04 and higher
Dealer	Open Activities
Dealer	Opportunities
Exam	Custom Object 04 and higher
Exam	Exam Registrations
Financial Account	Activities
Financial Account	Opportunities
Financial Plan	Activities
Financial Plan	Opportunities
Fund	Activities
Fund	Custom Object 04 and higher
Fund Request	Completed Activities

Parent Record Type	Related Record Type
Fund Request	Custom Object 04 and higher
Fund Request	Open Activities
Household	Custom Object 04 and higher
Lead	Completed Activities
Lead	Custom Object 04 and higher
Lead	Open Activities
MDF Request	Activities
MDF Request	Custom Object 04 and higher
MedEd Event	Completed Activities
MedEd Event	Custom Object 04 and higher
MedEd Event	Open Activities
Messaging Plan	Message Responses
Messaging Plan	Messaging Plan Items
Messaging Plan Item	Message Responses
Messaging Plan Item	Messaging Plan Item Relations
Objective	Accreditation Requests
Objective	Activities
Objective	Certification Requests
Objective	Course Enrollments
Objective	Custom Object 04 and higher
Objective	Exam Registrations
Objective	Objectives
Objective	Opportunities
Opportunity	Completed Activities
Opportunity	Custom Object 04 and higher
Opportunity	Open Activities
Opportunity	Plan Opportunities
Opportunity	Sub-Opportunities
Partner	Accreditation Requests
Partner	Business Plans

Parent Record Type	Related Record Type
Partner	Completed Activities
Partner	Course Enrollments
Partner	Custom Object 04 and higher
Partner	Exam Registrations
Partner	Open Activities
Period	Business Plans
Period	Objectives
Policy	Activities
Policy	Custom Object 04 and higher
Policy	Opportunities
Portfolio	Completed Activities
Portfolio	Custom Object 04 and higher
Portfolio	Open Activities
Program	Custom Object 04 and higher
Program	Opportunities
Sample Transaction	Transaction Items
Service Request	Completed Activities
Service Request	Custom Object 04 and higher
Service Request	Open Activities
Solution	Custom Object 04 and higher
Solution	Messaging Plan Item Relations
Solution	Messaging Plan Items
Special Pricing Request	Activities
Special Pricing Request	Custom Object 04 and higher
Vehicle	Custom Object 04 and higher

The following table shows the relationships where the Inherit Primary access level and its combinations (Inherit Primary, Add/Inherit Primary, and Add/Remove/Inherit Primary) are available. The relationships in this table are many-to-many relationships.

NOTE: If you currently use the Read/Create access level for any of the many-to-many relationships indicated in the following table, then it is recommended that you change the Read/Create access level to one of the Inherit Primary combinations on the related record types.

Parent Record Type	Related Record Type
Campaign	Opportunities
Contact	Calls
Contact	Completed Activities
Contact	Open Activities
Contact	Opportunities
Custom Object 01	Completed Activities
Custom Object 01	Open Activities
Custom Object 01	Opportunities
Custom Object 02	Completed Activities
Custom Object 02	Open Activities
Custom Object 02	Opportunities
Custom Object 03	Completed Activities
Custom Object 03	Open Activities
Custom Object 03	Opportunities

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Examples of Access Level Calculations](#) (on page 1153)
- [Process of Setting Up Access Profiles](#) (on page 1164)

Examples of Access Level Calculations

Click the following links to see some examples of how Oracle CRM On Demand calculates the access rights of users:

- [Example 1: Using the View Access Level](#) (on page 1154)
- [Example 2: Using the Inherit Primary Access Level](#) (on page 1158)
- [Example 3: Securing Data Through Books](#) (on page 1161)

The access rights in the examples are based on certain configurations of user roles, access profiles, and other access-control components. Oracle CRM On Demand calculates the access rights for an authenticated user each time the user interacts with it. Oracle CRM On Demand determines the access rights from the user's role and all of the access profiles that are applicable through owner access profiles, default access profiles, the reporting hierarchy, membership of custom books, user delegation, and team membership, which are referred to as the *access-control components*.

NOTE: Users can be employees of your company or employees of a partner organization. Users can also be external systems that access Oracle CRM On Demand.

Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [Process of Setting Up Access Profiles](#) (on page 1164)

Example 1: Using the View Access Level

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, Amanda Jacobsen has the Sales Rep role. Amanda can create new accounts and see all other account records. She is allowed to create opportunities, but she can see only opportunities that she owns or that she is authorized to see.

The following table shows the record-type settings on the Sales Rep role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	Yes
Opportunity	Yes	Yes	No

The Sales Rep role gives Amanda full control over the accounts and opportunities that she creates and restricted rights on records that she does not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	View
Opportunity	Read/Edit/Delete	Not applicable	Not applicable

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	View
Opportunity	Read-Only	Not applicable	Not applicable

In this example of calculating access rights, it is assumed that the Enable Parent Team Inheritance check box is not selected on the company profile. For more information about the Enable Parent Team Inheritance check box, see [About Access Propagation Through Team Inheritance](#) (on page 1136).

David Bloom also has a Sales Rep role in the same company. David has the same access rights as Amanda.

Amanda is the owner of Opportunity X, which is linked to Account 1. David creates an opportunity, Opportunity Y, and also links it to Account 1. Amanda is not on the opportunity team.

When Amanda views the list of the accounts in her company, she can see all accounts because her role allows her visibility to all accounts, including those she does not own. The following table shows the records that Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1		
Account Detail		
Account Name:	Account 1	
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name		Owner
Opportunity X		Amanda Jacobsen
Opportunity Y		David Bloom
Account Team		
Last Name	First Name	Account Access
Hope	Jonathan	Owner

Related Record Visibility in Example 1

To determine which related opportunity records Amanda can see on the account in this example, Oracle CRM On Demand examines Amanda's access rights, as follows:

- 1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all account records.

In this example, the answer is yes. Amanda's role allows her to read all account records, therefore Amanda can see the account. Because Amanda is not the owner of the parent account, her default access profile is used. The access level for the opportunity related record type on Amanda's default access profile is View.

- Determines if the parent record is in a book where Amanda is a book member.

In this example, the answer is no.

- Determines if Amanda is a member of the account team.

In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the account team.

In this example, the answer is no.

If the answer to this question is yes (that is, one or more of Amanda's subordinates is a member of the account team), Oracle CRM On Demand extracts the access level for the opportunity related record type for each of those subordinates from the appropriate access profile. The access profile assigned in the Account Access field on the subordinate's team membership on the account is used in that case (not the access profile assigned in the Opportunity Access field).

- Determines if Amanda has access to the account record through delegation.

In this example, the answer is no.

2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on the user's role.

- Determines if Amanda's role grants her the privilege for the opportunity record type.

Opportunities are not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

In this example, the answer is no.

3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the most permissive access level found is View. The Inherit Primary access level is not present, therefore all child opportunity records, including those the user is not authorized to see, are shown.

Actions on Related Records in Example 1

When a user attempts to perform an action on a related record, Oracle CRM On Demand must determine whether the user has the appropriate access rights for that action. In this example, Amanda can attempt to read the record details, or to edit the record, or to delete the record. Two cases are considered:

- In Case 1, Amanda attempts to perform an action on Opportunity X.
- In Case 2, Amanda attempts to perform an action on Opportunity Y.

Case 1: Amanda attempts to perform an action on Opportunity X, which she owns.

Oracle CRM On Demand examines Amanda's access rights, as follows:

1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all opportunity records.

In this example, the answer is no. Although Amanda can see the parent account record because her default access profile is used, her default access profile is not used for the opportunity record.

- Determines if the opportunity record is in a book where Amanda is a book member.

In this example, the answer is no.

- Determines if Amanda is a member of the opportunity team.

In this example, the answer is yes. Amanda is the owner of the opportunity, and is therefore in the opportunity team. The access level of the primary opportunity record type from Amanda's default access profile (the Sales Rep Default Access Profile) is Read/Edit/Delete.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the opportunity team.

In this example, the answer is no.

- Determines if Amanda has access to the account record through delegation.

In this example, the answer is no.

2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

- Determines if Amanda's role grants her the privilege for the Opportunity record type.

The Opportunity record type is not controlled through privileges. Therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

In this example, the answer is no.

3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the most permissive access level found is Read/Edit/Delete.

Case 2: Amanda attempts to perform an action on Opportunity Y, which is owned by David Bloom.

Oracle CRM On Demand examines Amanda's access rights, as follows:

1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all opportunity records.

In this example, the answer is no. Although Amanda can see the parent account record because her default access profile is used, her default access profile is not used for the opportunity record.

- Determines if the opportunity record is in a book where Amanda is a book member.

In this example, the answer is no.

- Determines if Amanda is a member of the opportunity team.

In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the opportunity team.

In this example, the answer is no.

- Determines if Amanda has access to the account record through delegation.

In this example, the answer is no.

2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

- Determines if Amanda's role grants her the privilege for the Opportunity record type.

The Opportunity record type is not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

In this example, the answer is no.

3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the final access level is No Access.

Related Topics

See the following topics for additional examples:

- [Example 2: Using the Inherit Primary Access Level](#) (on page 1158)
- [Example 3: Securing Data Through Books](#) (on page 1161)

Example 2: Using the Inherit Primary Access Level

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, Amanda Jacobsen is a Sales Rep in her company. Amanda can create new accounts and see all other account records. She is allowed to create opportunities, but she can see only opportunities that she owns or that she is authorized to see.

The following table shows the record-type settings on the Sales Rep Role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	Yes
Opportunity	Yes	Yes	No

The Sales Rep role gives Amanda full control over the accounts and opportunities she creates, and restricted rights on records that she does not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	Inherit Primary
Opportunity	Read/Edit/Delete	Not applicable	Not applicable

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	Inherit Primary
Opportunity	Read-Only	Not applicable	Not applicable

In this example of calculating access rights, it is assumed that the Enable Parent Team Inheritance check box is not selected on the company profile. For more information about the Enable Parent Team Inheritance check box, see [About Access Propagation Through Team Inheritance](#) (on page 1136).

David Bloom is also a Sales Rep in the same company. David has the same access rights as Amanda.

Amanda is the owner of Opportunity X, which is linked to Account 1. David creates an opportunity, Opportunity Y, and also links it to Account 1. Amanda is not on the opportunity team.

When Amanda views the list of the accounts in her company, she can see all accounts because her role allows her visibility to all accounts, including those she does not own. The following table shows the records that Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1	
Account Detail	
Account Name:	Account 1
Owner:	Jonathan Hope
Opportunities	
Opportunity Name	Owner
Opportunity X	Amanda Jacobsen
Account Team	

Account Detail: Account 1		
Last Name	First Name	Account Access
Hope	Jonathan	Owner
Bloom	David	Member

Related Record Visibility in Example 2

To determine which related opportunity records Amanda can see on the account in this example, Oracle CRM On Demand examines Amanda's access rights, as follows:

- 1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all account records.

In this example, the answer is yes. Amanda's role allows her to read all account records, therefore Amanda can see the account. Because Amanda is not the owner of the parent account, her default access profile is used. The access level for the opportunity related record type on Amanda's default access profile is Inherit Primary.

- Determines if the parent record is in a book where Amanda is a book member.

In this example, the answer is no.

- Determines if Amanda is a member of the account team.

In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the account team.

In this example, the answer is no.

If the answer to the question is yes (that is, one or more of Amanda's subordinates is a member of the account team), Oracle CRM On Demand extracts the access level for the opportunity related record type for each of those subordinates from the appropriate access profile. The access profile assigned in the Account Access field on the subordinate's team membership on the account is used in that case (not the access profile assigned in the Opportunity Access field).

- Determines if Amanda has access to the account record through delegation.

In this example, the answer is no.

- 2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

- Determines if Amanda's role grants her the privilege for the opportunity record type.

Opportunities are not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

In this example, the answer is yes, therefore Oracle CRM On Demand displays the following opportunity records on the account:

- All linked opportunity records where Amanda is the owner.
- All linked opportunity records that Amanda is authorized to see through all other access-control components.

Amanda's role denies her the ability to see opportunities that she does not own, and so she cannot see the opportunity that David Bloom created.

Actions on Related Records in Example 2

When Amanda attempts to perform an action on Opportunity X in this example, the calculation is the same, and the outcome of the access rights is the same as that in Case 1 in [Example 1: Using the View Access Level](#) (on page 1154). The final access level is Read/Edit/Delete.

Related Topics

See the following topics for additional examples:

- [Example 1: Using the View Access Level](#) (on page 1154)
- [Example 3: Securing Data Through Books](#) (on page 1161)

Example 3: Securing Data Through Books

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, a company uses custom books to organize its data by territory. Two books are used in this example: South West and East.

The South West book has three members:

- Amanda Jacobsen
- David Bloom
- Carlos Guzman

All users in the South West book have the Read-Only access profile on their book role.

The East book has three members:

- Rick Rogers
- Raj Kumar
- Jonathan Hope

All users in the East book have the Read-Only access profile on their book membership record.

When any of the users creates an account or opportunity record, an automated (workflow) process assigns the appropriate book to the record. It assigns the book based on the territory attribute of the record.

All of the users have the Sales Rep role. They can create new accounts and opportunities. They can see all account and opportunity records in their territory, but not in other territories.

The following table shows the record-type settings on the Sales Rep role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	No
Opportunity	Yes	Yes	No

All of the users have full control over the accounts and opportunities that they create, but they have restricted rights on records that they do not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	Inherit Primary
		Books	Read-Only
Opportunity	Read/Edit/Delete	Books	Read-Only

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	Inherit Primary
		Books	Read-Only
Opportunity	Read-Only	Books	Read-Only

NOTE: For all primary record types that support books, the relationship with the Books related record type is a one-to-child relationship.

In this example, it is assumed that the Enable Parent Team Inheritance check box is not selected on the company profile. For more information about the Enable Parent Team Inheritance check box, see [About Access Propagation Through Team Inheritance](#) (on page 1136).

When Amanda Jacobsen views the list of the accounts in her company, she can see the accounts in the South West book and the accounts she owns. She cannot see any other accounts.

The following table shows the records Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1	
Account Detail	
Account Name:	Account 1

Account Detail: Account 1		
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name		Owner
Opportunity X		Amanda Jacobsen
Opportunity Y		David Bloom
Account Team		
Last Name	First Name	Account Access
Hope	Jonathan	Owner

Amanda can see two opportunities because those opportunities are in the South West book, where she is a member. All other members of the South West book can see those opportunities.

Jonathan Hope is a member of the East book. When Jonathan signs in to Oracle CRM On Demand, he can also see Account 1, because he owns the account. However, he cannot see any opportunities that are related to Account 1, but which he does not own. The Inherit Primary access level on the Opportunities related record type on accounts provides this security.

Rick Rogers and Raj Kumar, who are members of the East book, cannot see the Account 1, Opportunity X, or Opportunity Y records. They cannot see the account because it is not in the East book, and their role prevents them from seeing account records that they do not own. Similarly, they cannot see Opportunity X or Opportunity Y because these opportunities are not in the East book, and their role prevents them from seeing opportunities they do not own.

Amanda cannot modify the Opportunity Y, which is owned by David Bloom. This is because of the following:

- Amanda does not own the account, therefore her owner access profile is not used.
- Amanda's role prevents her from accessing opportunity records that she does not own, therefore her default access profile is not used.
- The only access profile that is active at this point is the Read-Only access profile that Amanda has through her membership of the South West book.

Therefore, Amanda's access level to Opportunity Y is Read-Only.

Related Topics

See the following topics for additional examples:

- [Example 1: Using the View Access Level](#) (on page 1154)
- [Example 2: Using the Inherit Primary Access Level](#) (on page 1158)

Process of Setting Up Access Profiles

This topic describes how to set up access profiles.

Before you begin. To view, create, or revise access profiles at your company, your role must include the Manage Users and Access privilege.

To set up an access profile, perform the following tasks:

- 1 [Setting Up Access Profiles](#) (on page 1164).
- 2 [Specifying Access Levels for Primary Record Types](#) (on page 1166).
- 3 [Specifying Access Levels for Related Record Types](#) (on page 1166).

For links to topics that provide additional information about access profiles, see [Related Topics for Access Profiles](#) (on page 1167).

Setting Up Access Profiles

You can edit existing access profiles, or you can add access profiles by doing the following:

- Creating new profiles
- Copying existing profiles and editing their access levels.

The following procedure describes how to set up an access profile

To set up an access profile

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the Access Profile Management section, click the Access Profiles link.
- 4 In the Access Profile List, do one of the following:
 - To create a new profile, click New in the title bar.
 - To edit an existing profile, click Edit on the profile that you want to edit.
 - To create a new profile based on an existing profile, click Copy on the profile that you want to copy.

The Access Profile Wizard opens to guide you through the process.

- 5 In Step 1 of the Access Profile Wizard, provide a name and description, and set the remaining fields as needed. The remaining fields are described in the following table.

Field	Description
Mark for Translation	The Mark for Translation check box is effective only in both of the following circumstances: <ul style="list-style-type: none">■ When the name of an existing access profile is being changed

Field	Description
	<ul style="list-style-type: none"> ■ The existing access profile name has already been translated into one or more additional languages <p>In these circumstances, you can use the Mark for Translation check box to indicate whether the translated access profile name is to be replaced by the new name or is to remain unchanged. Depending on the setting of the Mark for Translation check box, the access profile name is displayed as follows:</p> <ul style="list-style-type: none"> ■ If you select the Mark for Translation check box the new name is displayed in the language in which it was entered, regardless of the language used for viewing the list of access profiles. When the list of access profiles is viewed in the language in which the new name was entered, the name is displayed in the default font. However, when the list of access profiles is viewed in any other language, the name is displayed in blue font within brackets. ■ If you do not select the Mark for Translation check box, the new name appears when the list of access profiles is viewed in the language in which the new name was entered. However, when the list of access profiles is viewed in any other language, the original translated access profile name still appears. <p>The Mark for Translation check box does not have any effect when a new access profile is added. When a new access profile is added, the new name automatically appears in the list of access profiles in all languages. When the list of access profiles is viewed in the language in which the new name was entered, the name of the new access profile is displayed in the default font. When the list of access profiles is viewed in any other language, the name of the new access profile is displayed in blue font within brackets.</p>
Grantable to Team Members	To make the access profile available to assign to team members, select this check box.
Grantable to Book Users	To make the access profile available for assignment to book users, select this check box. For more information, see Creating Access Profiles for Books (on page 1195).
Disabled	If you select this check box, the access profile is disabled. A disabled access profile cannot be used in any new associations with roles, teams, or books. However, the disabled access profile continues to function as the access profile where it has been associated previously with a role, team, or book until you assign a different access profile to the role, team, or book.

NOTE: By default, the Grantable to Team Members and Grantable to Book Users check boxes are selected on the predefined Edit, Full and ReadOnly access profiles. Therefore, when a user adds another user to a team or a book, the picklist of access profiles that appears in the Add Users or Edit Users dialog box includes these predefined access profiles. If you want to prevent users from assigning any of these three access profiles to a user in a book or a user book in a team, clear the appropriate check box for that access profile.

Specifying Access Levels for Primary Record Types

To specify access levels for primary record types, complete the steps in the following procedure.

To specify access levels for primary record types

- 1 In Step 2 of the Access Profile Wizard, select the access level for each of the primary record types. Choose from:

- Read-Only
- Read/Edit
- Read/Edit/Delete

For more information about the access levels for primary record types, see [About Access Levels for Primary Record Types](#) (on page 1144).

- 2 If you want to specify access levels for the related record types for a primary record type, click the Related Information link for the primary record type. Otherwise, click Finish to save your changes.

Most record types have a Related Information link. Related information appears as linked records on the record Detail pages. For more information about specifying access levels for related record types, see [Specifying Access Levels for Related Record Types](#) (on page 1166).

Specifying Access Levels for Related Record Types

To specify access levels for related record types, complete the steps in the following procedure.

To specify access levels for related record types

- 1 In Step 2 of the Access Profile Wizard, click the Related Information link for the primary record type for which you want to specify the access level for one or more related record type.
- 2 Select the appropriate access level for each related information record type.

The picklist of access level options that appears in the access level field for each related record type depends on the relationship of the related record type to its parent record type. Depending on the access level you set in this field and in the Role Management Wizard, you can grant or revoke users' rights to create, update, or view records of that record type.

For more information about the access levels for related record types, see [About Access Levels for Related Record Types](#) (on page 1145).

NOTE: To create a new opportunity, the access level for the Revenue related record type on the Opportunity record type must be set to Full.

For information about the access profile settings that are required for converting leads, see [Access Profile and Role Settings for Converting Leads](#) (on page 168). For information about the access profile settings that are required for converting deal registrations, see [Access Profile and Role Settings for Converting Deal Registrations](#) (on page 346).

- 3 When you finish setting the access levels on the related record types for a primary record type, click Previous to return to the main page of step 2 of the wizard.

- 4 Repeat steps 1 through 3 of this procedure for each primary record type for which you want to specify access levels for one or more related record types.
- 5 When you finish setting the access levels for all of the primary record types and their related record types, click Finish to save your settings.

Related Topics for Access Profiles

See the following topics for related information:

- [Access Profile Management](#) (on page 1133)
- [About Access Profiles in Roles](#) (on page 1134)
- [About Access Profiles in Teams, Groups, and Books](#) (on page 1136)
- [About Access Propagation Through Team Inheritance](#) (on page 1136)
- [How Access Rights for Displaying Primary Record-Type Records are Determined](#) (on page 1138)
- [How Access Rights for Working with Primary Record-Type Records are Determined](#) (on page 1138)
- [How Access Rights for Displaying Related Record-Type Records are Determined](#) (on page 1140)
- [How Access Rights for Working with Related Record-Type Records are Determined](#) (on page 1142)
- [Working with the Access Profile List Page](#) (on page 1143)
- [Examples of Access Level Calculations](#) (on page 1153)

Role Management

In Oracle CRM On Demand, you manage roles in the Role List page and in the Role Management Wizard. You access the Role List page and the Role Management Wizard from the global Admin link, which is available on every page in Oracle CRM On Demand.

A *role* in Oracle CRM On Demand is similar to a business function that a user performs within an organization, such as a sales executive function or a service manager function. Within your organization, your business function gives you certain privileges and permissions that are unique to your business function. Similarly, within the context of Oracle CRM On Demand, roles differentiate one business function from another, by defining the features in Oracle CRM On Demand that a user has the privileges to use, the set of permissions the user is given to work with protected information, and the user interface settings that display information.

NOTE: Users can be employees or employees of a partner organization. Users can also be external systems that access Oracle CRM On Demand.

The parameters defined by a role include:

- Privileges
- Access to record types
- Access profiles for the role
- User interface settings, which include the following:
 - Tab settings

- Page layouts
- Search layouts
- Homepage layouts

Each user has one assigned role. The same role can be assigned to multiple users. Roles do not have a hierarchy.

Related Topics

See the following topics for related information:

- [Guidelines for Setting Up Roles](#) (on page 1168)
- [Working with the Role List Page](#) (on page 1169)
- [About Record Type Access in Roles](#) (on page 1170)
- [About Access Profiles in Roles](#) (on page 1134)
- [About Privileges in Roles](#) (on page 1172)
- [Adding Roles](#) (on page 1173)

Guidelines for Setting Up Roles

Oracle CRM On Demand provides a set of prebuilt roles that you can use as your starting point for setting up roles for your company. The User and Role Setup Template contains information about the prebuilt roles, listing their record access, privileges, and default tab access. For information about finding the User and Role Setup templates, see [Using Administrator Templates During Setup](#) (on page 993).

As an example of the type of role that you can set up in Oracle CRM On Demand, your company might require two distinct sales forces: the Install Base Account Management sales force and the New Business sales force. Field sales representatives in the Install Base Account Management sales force track account information about their customer deployments. Field sales representatives in the New Business sales force track account information that profiles the purchasing requirements of their prospect account. Although these two job duties are similar, the type of information most relevant to support their daily processes is different. In this example, you can set up two roles:

- The Install Base Field Sales Reps role
- The New Business Field Sales Reps role

You can base each of these roles on the prebuilt Field Sales Rep role, and tailor the new roles by adding different page layouts to support the unique business requirements of the two sales forces.

You can continue to change and add role definitions as required, for example, as a result of organizational change, or the acquisition of another company. If the organizational structure of your company changes, the business functions of one or more employees can also change. If your company acquires another company, you might have to assimilate additional employees as users in Oracle CRM On Demand.

When setting up roles, follow these guidelines:

- Determine how each employee or group of employees will use Oracle CRM On Demand.

Examine the job functions of your employees to determine the following:

- What tasks they must complete and which records they require access to
- What kind of access they require to each type of record
- If there are records or tabs that they must not be able to access

The following table shows some examples of access types.

Access Type	Example
Feature access	The Inside Sales Rep role provides access to the Convert button on the Lead Detail page.
Record access	The Executive role provides edit access to all opportunity records regardless of the owner.
Tab access	By default, users who have the Sales and Marketing Manager role can access the Accounts and Opportunities tabs, but cannot access the Service Requests and Solutions tabs.

- Review the characteristics of each of the prebuilt roles to determine if these roles meet the needs of your employees.

The names of the prebuilt roles do not necessarily match your company's job titles. You must match job functions and tasks to the roles, not job titles.

- Set up your roles as follows:
 - If a prebuilt role is close to what you want for an employee group, create a new role by copying the prebuilt role, giving the copy a new name, and then editing the copy to meet your requirements.
 - If no prebuilt role is close to what you require, create a new role to match your requirements.

TIP: Use the [User and Role Setup Template](#) to help you document the role requirements of your employee groups. Then, refer to the completed template when you create or edit roles and set up users in Oracle CRM On Demand.

Related Topics

See the following topics for related information:

- [Role Management](#) (on page 1167)
- [Working with the Role List Page](#) (on page 1169)
- [About Record Type Access in Roles](#) (on page 1170)
- [About Access Profiles in Roles](#) (on page 1134)
- [About Privileges in Roles](#) (on page 1172)
- [Adding Roles](#) (on page 1173)

Working with the Role List Page

On the Role List page, you can perform the actions in the following table.

To do this	Follow these steps
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To do this	Follow these steps
Add a new role	<p>In the title bar of the Role List page, click New Role. The Role Management Wizard opens.</p> <p>For more information about using the Role Management Wizard, see Adding Roles (on page 1173).</p>
Add a new role by copying an existing role	<p>In the record-level menu beside the role name, select Copy. The Role Management Wizard opens.</p> <p>For more information about using the Role Management Wizard, see Adding Roles (on page 1173).</p>
Delete a role	<p>In the record-level menu beside the role name, select Delete, then confirm that you want to delete the role.</p> <p>NOTE: You cannot delete the Administrator role.</p> <p>When you delete a role, all users who have that role assigned to them continue to have the role until you assign a different role to them. However, after you delete a role, you cannot assign that role to any user.</p>
Select a language for viewing the list of roles	<p>In the title bar of the Role List page, in the Translation Language field, select the language in which you want to view the list of roles. You can view the list in any of the languages that are supported for your company in Oracle CRM On Demand.</p> <p>NOTE: If an existing role does not have a translated role name, the name of the role is not translated and appears in brackets.</p>

You can use Alpha Search to filter the list of roles. For more information about Alpha Search, see [Filtering Lists](#) (on page 77).

Related Topics

See the following topics for related information:

- [Role Management](#) (on page 1167)
- [Guidelines for Setting Up Roles](#) (on page 1168)
- [About Record Type Access in Roles](#) (on page 1170)
- [About Access Profiles in Roles](#) (on page 1134)
- [About Privileges in Roles](#) (on page 1172)
- [Adding Roles](#) (on page 1173)

About Record Type Access in Roles

You control access to primary record types for a role in step 2 of the Role Management Wizard. For more information about adding roles, see [Adding Roles](#) (on page 1173).

A primary record type is a record type that can be used as an independent record type. Most, but not all, of the primary record types can appear as tabs in Oracle CRM On Demand. However, there are some primary record types that cannot appear as tabs. For example, the Book record type is a primary record type (that is, book records can be created as independent records). However, the Book record type cannot appear as a tab. Record types that are not primary record types cannot appear as tabs.

With some exceptions, the primary record types that meet the following criteria are listed in step 2 of the Role Management Wizard:

- Your company is licensed to use the record type.
- Your role has the appropriate privilege to access the record type.

The exceptions are record types that are used for administrative purposes only, such as the company profile, user records, workflow rules, and so on. Access to such record types is controlled through privileges only.

For each primary record type that is listed in step 2 of the wizard, access to the record type for the role is controlled through three settings:

- **Has Access.** When the Has Access check box in step 2 of the Role Management Wizard is selected for a primary record type on a role, users who have the role can access records of that record type. If the Has Access check box is not selected for a record type on a role, users who have the role are denied all forms of access to the record type. For example, if the Has Access check box is not selected for the Account record type on a role, all forms of access to the Account record type, including related applets, search capabilities, and other access to the Account record type, are denied to users who have the role. Then the following can occur:

- If a user who does not have access to the Account record type attempts to associate an opportunity with an account record, the operation fails.
- If a user who does not have access to the Account record type sees an opportunity that is already linked to an account, the user is not able to view any details of the linked account record.

NOTE: Denying access to a record type (by not selecting the Has Access check box for the record type in the Role Management Wizard) can prevent a user from being able to create a record of another record type. For example, if you deny access to a record type that a user must access to create a record based on another record type, you can prevent a user who has the role from being able to create that record.

- **Can Create.** When the Can Create check box in step 2 of the Role Management Wizard is selected for a record type on a role, users who have the role can create records of that record type.

If the Can Create check box for a primary record type is not selected, users who have the role do not have the ability to create a record of that primary record type.

NOTE: The permission to create records of a primary record type is controlled by this setting. It is not controlled through access profiles. Access profiles control access to existing data, so primary records must exist before access profiles can control access to those records.

- **Can Read All Records.** When the Can Read All Records check box in step 2 of the Role Management Wizard is selected for a primary record type on a role, users who have the role can see all records of that record type. If the Can Read All Records check box is not selected for a primary record type, as a general rule, users who have the role can see records of that record type only if they are authorized to see the record. Other access-control components can influence the visibility to records, such as books, teams, groups, and the management hierarchy. Users can gain visibility to records that they do not own through those access-control components. However, if no other access-control component authorizes visibility to the records, and the Can Read All Records check box is not selected, then the user sees only the records that the user owns.

Related Topics

See the following topics for related information:

- [Role Management](#) (on page 1167)
- [Guidelines for Setting Up Roles](#) (on page 1168)
- [Working with the Role List Page](#) (on page 1169)
- [About Access Profiles in Roles](#) (on page 1134)
- [About Privileges in Roles](#) (on page 1172)
- [Adding Roles](#) (on page 1173)

About Privileges in Roles

You grant or revoke privileges for a role in step 4 of the Role Management Wizard. For more information about adding roles, see [Adding Roles](#) (on page 1173).

Privileges control the features that your company is licensed to use in Oracle CRM On Demand. When your company is first set up to use Oracle CRM On Demand, the Administrator role is given all the privileges for all the licensed features. Every time a user interacts with Oracle CRM On Demand, Oracle CRM On Demand reviews the set of privileges assigned to that user's role to determine whether the user has the necessary privileges to perform certain functions and to access certain record types. If a privilege that was previously granted to a role is later revoked, any user who has the role loses the ability to use the feature. When a privilege is revoked, any existing data and configuration information that were put in place by a user who had the privilege are not lost.

In the Role Management Wizard, privileges are organized in categories. Each category represents the group of privileges that comprises a piece of functionality in Oracle CRM On Demand. For example, *Admin: Users and Access Controls* is a category of privilege that controls all functional areas of User Management and Access Control.

Each privilege relates to an individual functional area within a category of privileges. For example, Manage Books is a privilege that is required if a user who has the role wants to create, update, edit, and delete custom books and subbooks, and manage associated members. Each privilege also exposes control fields and other capabilities unique to the feature. To determine which privileges are required to allow users to use a feature, see the online help.

NOTE: Granting a privilege to a role is not enough to grant all access rights to allow a user to use the functionality. When you grant a privilege, the necessary record types and functional details required for the feature are exposed in the role. For example, when the Manage Books privilege is assigned to a role, a user who has the role sees the Books record type in step 2 of the Role Management Wizard, and also in the Access Profile Wizard. However, to give the user the necessary rights to work with book records, you must also configure the necessary levels of access in step 2 (Record Type Access) of the Role Management Wizard for the user's role and in the access profiles for the role.

Related Topics

See the following topics for related information:

- [Role Management](#) (on page 1167)
- [Guidelines for Setting Up Roles](#) (on page 1168)

- [Working with the Role List Page](#) (on page 1169)
- [About Record Type Access in Roles](#) (on page 1170)
- [About Access Profiles in Roles](#) (on page 1134)
- [Adding Roles](#) (on page 1173)

Adding Roles

You can add a role to Oracle CRM On Demand by doing the following:

- Creating a new role
- Copying an existing role, renaming the copy, and then editing the privileges and access rights of the copy

Copying roles is useful if you want to have similar roles, but you want users to see different page layouts. For example, your North American and EMEA executives might want to view opportunity information in different ways, requiring different fields and page layouts for each set of users. To set up this configuration, create two roles that are based on the default Executive role, and name your new roles, *Exec - North America* and *Exec - EMEA*. When you copy the Executive role, the access privileges of the original role are retained for the new role, and you must change only the page layouts so that users to whom you give the new role are presented with the views and fields relevant to their work.

NOTE: You must create the page layouts that you want to associate with the role. For information about creating page layouts, see [Record Type Application Customization Page](#) (on page 1031).

TIP: Consider setting up a test user for each role. Then, activate the test user, and make sure the configurations are set up correctly. Do not activate other users until you have completed all user setup activities, including access rights, role settings, reporting and data-sharing hierarchies, workflow rules, and any other business process customization. Deactivate test users when the testing is complete.

Before you begin. Do the following:

- Make sure your role has the Manage Users and Access privilege.
- Read the guidelines for setting up for roles, see [Guidelines for Setting Up Roles](#) (on page 1168).

The following procedure describes how to add a role.

To add a role

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click User Management and Access Controls.
- 3 In the Role Management section, click Role Management.
- 4 In the Role List page, in the Translation Language field, choose your company's primary language.
- 5 Do one of the following:
 - To create a new role by copying an existing role, click Copy on the role that you want to copy.
 - To create a new role that is not based on an existing role, click New Role in the title bar of the page.

The Role Management wizard appears, to lead you through the process. Each step in the Role Management Wizard controls certain settings for the role. All the role settings together determine the access rights for users who have the role.

- 6** In Step 1, Role Name, provide a name and description, and complete the remaining fields as needed. The remaining fields are described in the following table.

Field	Description
Mark for Translation	<p>The Mark for Translation check box is effective only in both of the following circumstances:</p> <ul style="list-style-type: none"> ■ When the name of an existing role is being changed ■ The existing role name has already been translated into one or more additional languages <p>In these circumstances, you can use the Mark for Translation check box to indicate whether the translated role name is to be replaced by the new name, or is to remain unchanged. Depending on the setting of the Mark for Translation check box, the role name is displayed as follows:</p> <ul style="list-style-type: none"> ■ If you select the Mark for Translation check box, then the new name is displayed in the language in which it was entered, regardless of the language used for viewing the list of roles. When the list of roles is viewed in the language in which the new name was entered, the name is displayed in black font. However, when the list of roles is viewed in any other language, the name is displayed in blue font within brackets. ■ If you do not select the Mark for Translation check box, the new name appears when the list of roles is viewed in the language in which the new name was entered. However, when the list of roles is viewed in any other language, the original translated role name still appears. <p>The Mark for Translation check box does not have any effect when a new role is added. When a new role is added, the new name automatically appears in the list of roles in all languages. When the list of roles is viewed in the language in which the new name was entered, the name of the new role is displayed in black font. When the list of roles is viewed in any other language, the name of the new role is displayed in blue font within brackets.</p>
Default Sales Process	<p>(Optional) To set the default sales process for new opportunities created by users who are assigned this role, choose an option in the Default Sales Process field.</p> <p>For more information about this option, see Setting Up Sales Processes, Categories, and Coaches (on page 1274).</p>
Theme Name	<p>(Optional) To set the default theme for the role, choose a theme in the Theme Name field.</p> <p>For more information on creating themes, see Creating New Themes (on page 1093).</p>

Field	Description
Action Bar Layout	By default, the standard layout is used for the Action bar for all roles. You can assign a different Action bar layout for the role.
Lead Conversion Layout	<p>(Optional) To set a lead conversion layout (for the Convert Lead page) for the users assigned this role, choose a layout in the Lead Conversion Layout field.</p> <p>If you do not choose a layout for the role, the default layout for the company is used for the role. For information about creating lead conversion layouts, see Creating Lead Conversion Layouts (on page 1264).</p>

- 1 In Step 2, Record Type Access, for each record type, select the check box for each access level that you want to grant to the role.

You can select one or more of the following access levels for each record type:

- Has Access
- Can Create
- Can Read All Records

For more information about these access levels, see [About Record Type Access in Roles](#) (on page 1170).

CAUTION: Denying access to a record type (by not selecting the Has Access check box for the record type in the Role Management Wizard) can prevent a user from being able to create a record of another record type. For example, if you deny access to a record type that a user must access to create a record based on another record type, you can prevent a user who has the role from being able to create that record.

NOTE: To convert leads or deal registrations, users must have the appropriate access level settings for certain record types. For more information about the access levels that are required for converting leads, see [Access Profile and Role Settings for Converting Leads](#) (on page 168). For information about the access levels that are required for converting deal registrations, see [Access Profile and Role Settings for Converting Deal Registrations](#) (on page 346).

TIP: When you make changes to the access levels for a role, after you save your changes, users assigned the role must sign out and sign in again for the changes in their role to take effect.

- 2 In Step 3, Access Profiles, choose the access profiles to assign to this role:

For more information about access profiles in roles, see [About Access Profiles in Roles](#) (on page 1134).

- 3 In Step 4, Privileges, select the Assign check box for each privilege that you want to grant to the role, or clear the Assign check box for any privilege you want to revoke from the role.

Privileges are organized alphabetically by category.

CAUTION: In some cases, if the Assign check box for a privilege is cleared on the Administrator role, the privilege is removed from Oracle CRM On Demand, and the company administrator cannot grant that privilege to any other role. If this problem occurs, contact Oracle CRM On Demand Customer Care to restore the privilege.

For more information about privileges in roles, see [About Privileges in Roles](#) (on page 1172).

- 4 In Step 5, Tab Access and Order, move the tabs to the appropriate section of the page, then click the up and down arrows in the Selected Tabs section to define the order in which the tabs that the user sees by default are displayed.

The Not Available Tabs section lists the record-type tabs and custom Web tabs that you can make available to the role. The list of record types that appear in this section is determined by Oracle CRM On Demand. Most of the record types that are listed in step 2 of the Role Management Wizard also appear in this list. Other record types, such as Books, do not appear in this list because they cannot be displayed as tabs. The tabs shown in the Not Available Tabs section are not available to users who have the role.

To make tabs available or visible to users who have this role, do the following:

- Move tabs that you want users to see by default to the Selected Tabs section. This section lists the record-type tabs and custom Web tabs that are visible by default to any user who has the role, the first time the user signs in with the role. Use the up and down arrows to determine the order in which the tabs are initially displayed. Each user who has the role can customize his or her settings, so that tabs are no longer displayed by default or are displayed in a different order. For more information about how users can manage their personal settings, see [Personalizing Your Application](#).
- Move tabs that you do not want users to see by default, but which the users can make visible for themselves, to the Available Tabs section. This section lists the record-type tabs and custom Web tabs that are available to the role, but that are not displayed by default. That is, the tabs listed in this section are not displayed to the users until the users make the tabs visible for themselves in their personal layout (available from the My Setup link). Each user who has the role can personalize his or her settings so that the available tabs are displayed by default. Each user can also specify the order in which all of the tabs are displayed.
- Leave tabs that you want hidden from users in the Not Available Tabs section.

NOTE: Moving a tab from the Not Available Tabs section to the Available Tabs or Selected Tabs section makes the tab available to the user only if the Has Access check box is selected for the record type in step 2 (Record Type Access) of the Role Management Wizard.

TIP: You can move a range of tabs at the same time by selecting the top one, holding down the Shift key, and clicking the last one in the range. Then click the right or left arrow.

- 5 In Step 6, Page Layout Assignment, for each record type, choose if the Page View Type is static or dynamic, then select from the list of page layouts available for that view type.

Page layouts determine the fields and sections users see on the Create, Edit, and Detail pages for the various record types. Oracle CRM On Demand comes with a standard page layout for each record type. The standard page layouts, which cannot be deleted, are static page layouts. So, the Static option is always available in the Page View Type field. The Dynamic option is available only if there are dynamic page layouts available for the record type. Company administrators can create additional, customized, static page layouts or dynamic page layouts for record types.

For each record type, the standard page layout and any page layouts that are created for the record type are available for assignment to the role. For more information about creating static and dynamic page layouts, see [Record Type Application Customization Page](#) (on page 1031).

The default page layout for a record type is the standard, static page layout for that record type.

NOTE: The list of record types that appears in step 6 of the Role Management Wizard is determined by Oracle CRM On Demand. You might see record types such as User Admin and User Owner, which do not appear as tabs in Oracle CRM On Demand

- 6** In Step 7, Search Layout Assignment, for each record type, select from the list of available search layouts.

For each listed record type, the list of available layouts is shown in the Search Layout Name field. Search layouts determine the fields (standard fields and custom fields) that users can use when searching for records, and the fields that users see in search results pages. You can assign a search layout for most of the primary record types that are available to the role as tabs. You can also assign search layouts to other record types that are also searchable, such as Product and User. For more information on creating and modifying customized search layouts, see [Managing Search Layouts](#) (on page 1064).

- 7** In Step 8, Homepage Layout Assignment, for each record type, select from the list of available homepage layouts.

For each listed record type, the standard Homepage layout and any Homepage layouts that you create for the record type are available for you to assign to the role. The list of record types includes all of the primary record types that are available as tabs for the role.

Homepage layouts determine what information users see on the Homepage for each record type. Oracle CRM On Demand comes with a default Homepage layout for each primary record type that can appear as a tab. You can create additional, customized Homepage layouts for record types. For more information about creating Homepage layouts, see [Creating Record Homepage Layouts](#) (on page 1068).

- 8** Click Finish.

Related Topics

See the following topics for related information:

- [Role Management](#) (on page 1167)
- [Guidelines for Setting Up Roles](#) (on page 1168)
- [Working with the Role List Page](#) (on page 1169)
- [About Record Type Access in Roles](#) (on page 1170)
- [About Access Profiles in Roles](#) (on page 1134)
- [About Privileges in Roles](#) (on page 1172)

Book Management

Books are an efficient method of organizing and segregating records, so that users can collaborate without being team members for each record.

Using books to organize your company data makes searches for records faster and more efficient. Books can coexist with groups and teams. If your requirements for providing access to groups of users are straightforward and relatively simple, you can use group assignment. However, if the requirements of group-record ownership are more complex, you are recommended to use books.

Default User Books

In Oracle CRM On Demand, a default book is assigned to each user, and bears the user's name. When a record is assigned to a user, the record is assigned to the user's default book. Where a record is owned by a team, the team represents the set of default books of the users who are members of the team. User books are automatically associated with records when the record owner is changed, and when team membership is changed.

Custom Books

When the book functionality is enabled, you can create custom books to organize your data to suit your business purposes. Typically, custom books are referred to as *books*. Books can be independent of each other, or you can organize your books into hierarchies. For example, you can create books to segment your data according to the organizational units of your business, such as territories or products. You can then set up users to have the appropriate level of access to the books.

Books Created Automatically for Partners

When a partner record is made active in Oracle CRM On Demand, a book that can contain data is automatically created for the partner organization. The books that are automatically created for partners are available for selection in the Book lookup window that is accessed from the Partner record pages when in the Books related item on a partner record. The Partner record pages are accessible to users in the brand owner company only. If the Access to Partner check box or the Reciprocal Access to Partner (Reverse) check box is selected when a partner relationship is added to a partner record, the books that were automatically created for the related partners are synchronized. Then, wherever partner accounts are associated in Oracle CRM On Demand, the partner users who are associated with each of the synchronized partner books can see the partner accounts to which their partner organization is related.

When a user is added to a partner organization, the user is also automatically associated with the partner book for the partner organization.

Custom Books for Partners

You can also create custom books for partner organizations. You can assign any combination of users, including users from the brand owner company, and users in partner organizations, to such custom books, as required.

Record Types Supported for Books

In the same way that records of different types can be assigned to the same user, records of different types can be assigned to the same book. The following record types can be assigned to books:

- Account
- Accreditation
- Allocation
- Application
- Appointment
- Business Plan

- Campaign
- Certification
- Contact
- Course
- Custom Objects
- Deal Registration
- Dealer
- Exam
- Financial Account
- Financial Plan
- Fund
- Household
- Inventory Audit Report
- Inventory Period
- Lead
- MDF Requests
- MedEd Event
- Messaging Plan
- Objective
- Opportunity
- Partner
- Policy
- Portfolio
- Program
- Sample Lot
- Sample Transaction
- Service Request
- Smart Call
- Solution
- Special Pricing Request
- Task
- Vehicle

Books in the Book Selector

If the Book selector is enabled for the company, the Book selector field appears in targeted searches and advanced searches, in the title bar of list pages, and in the Reports Homepage. The Book selector is used to limit a targeted search to a custom book or a user book that can contain the record that the user wants to find. The plus sign (+), which appears in the Book selector field, indicates the presence of sublevels.

NOTE: Partner books appear in the Book selector for the Partner record type only.

Clicking the icon next to the Book selector displays the book hierarchy, which is organized as follows:

- **All.** The default root node for all books, including custom books and user books
 - **Books.** The default root node for all custom books set up for your company
 - **Users.** The default root node for all user books

All, Books, and Users are nodes or anchors. They are not real books. As an example of a book hierarchy, assume that a company sets up a geographic book hierarchy for America. Assume that a user, John Williams, who has subordinates, is also associated with the books in the geographic hierarchy. For this user, the following hierarchy is shown in the Book selector, under the All option:

- **Books**
 - **America** (The parent book)
 - **North** (Subbook. A subbook can also be a parent book for a further level of subbooks.)
 - **East** (Subbook)
 - **West** (Subbook)
 - **South** (Subbook)
- **Users**
 - **John Williams** (User who has subordinates)
 - **Lucy Harris** (Subordinate. A subordinate can also have subordinates.)
 - **Rick Rogers** (Subordinate)
 - **Donna Jones** (Subordinate)
 - **Jeff Smith** (Subordinate)

NOTE: Books at the lowest level of a hierarchy are called leaf-node books.

The Include Sub-Items check box in the Book selector allows the user to specify that data in subitems (subordinates or subbooks) is to be included in the search. The Include Sub-Items check box is permanently selected in the Book selector for reports.

Selecting Books for Searches

When searching for records, users select the book that contains the data they want to find. If users cannot be sure which book at a certain level of a book hierarchy contains the data they are looking for, the users select the next book higher up in the hierarchy for the search.

If the user selects the Include Sub-Items option in the Book selector, and the Manager Visibility Enabled check box is selected in the company profile, the data in the subbooks or subordinates is included in the search.

As an example, consider the following book hierarchy:

- America
 - North
 - North Area 1
 - North Area 2

If a user is unsure whether a record is in North Area 1 or North Area 2, the user selects the North book for the search, rather than selecting the America book.

Related Topics

For information about designing your book structures, setting up books, and enabling users to use books, see the following topics:

- [About Designing Book Structures](#) (on page 1181)
- [About Web Services Support for Books](#) (on page 1185)
- [Process of Setting Up Books](#) (on page 1185)
- [Verifying Book Setup for the Administrator Role](#) (on page 1186)
- [Creating Book Types and Book User Roles](#) (on page 1190)
- [Creating Books and Book Hierarchies](#) (on page 1190)
- [Associating Users with Books](#) (on page 1192)
- [Creating Access Profiles for Books](#) (on page 1195)
- [Enabling Books for Your Company](#) (on page 1196)
- [Enabling Books for Users and User Roles](#) (on page 1197)
- [Adding Books to Record Detail Page Layouts](#) (on page 1199)
- [Assigning Records to Books](#) (on page 1200)
- [Book Hierarchy Page](#) (on page 1202)
- [Book Fields](#) (on page 1202)
- [Information about Troubleshooting Books](#) (on page 1204)

About Designing Book Structures

To set up an efficient book structure, you must plan your book hierarchies carefully. Consider the following guidelines when you design and refine the book hierarchies for your company:

- Do not create custom books that replicate user books.
- Determine the organization and access policies for your business data.
- Determine whether the corporate structure is relevant to data management.
- Determine the data affiliations in your company.
- Design your books based on user needs, and consider the tasks where users most commonly use books.

- Design your books so that the functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.
- Keep the number of levels in your book hierarchies to a minimum.
- As far as possible, reduce the amount of cross-listing in the book structure. *Cross-listing* is the practice of duplicating records across multiple books.
- Use workflow rules to automate book management.

User Books

The disadvantage of creating custom books that replicate user books is that the data in the custom books and in the default user books must be synchronized. This additional task increases server-processing time, and affects the speed at which records are retrieved.

NOTE: One reason why a company might consider replicating user books is to give a user temporary access to another user's data. A better way of meeting this need is to add the user who wants to access the data as a delegate for the user who owns the data.

Data Access Needs

Your book structure does not have to reflect your company's corporate hierarchy. Instead, it is recommended that your book structure should closely reflect how your company organizes its data. Parts of your business can be organized by geography, while other parts can be organized by product line or industry. Pay special attention to cases where:

- Two (or more) departments must not be able access data belonging to the other department
- Two (or more) departments must be able to access data belonging to the other department

Relevance of Corporate Structure

In many companies, a parent organization has complete access to all data in the child organizations. Members of such a parent organization typically have global access to data across all child organizations.

If your organization is structured in this way, it is recommended that you do not to set up books that reflect organizational structure at the parent organization level. However, consider the following:

- Setting up books that reflect the organizational structure at other levels (such as child organization level)
- Setting up other book hierarchies at parent organization level. For example, at parent organization level, you can create a book or book hierarchy that allows users at parent organization level to view opportunities that have significant revenue potential, across all child organizations.

Data Affiliations

Examine the procedures that your company follows when a user transfers from one department to another. For example:

- If the data that the user manages always moves to the new department with the user so that there is continued affiliation of data, it is best to manage your data through record ownership and teams. Typically, appointments and tasks move with the user at all levels. In some sales environments, all

customer data moves with the user. This data affiliation is true for small and medium businesses and for businesses that focus on low volume, high-value sales.

- If the data usually stays in a fixed organization, such as a geographical organization, so that there is organizational ownership of data, it is best to manage the data through books that reflect the organizational structure.
- If both continued affiliation and organizational ownership continue to exist for some time after the user moves to another department, the two hierarchies can coexist.

User Needs and Tasks

When designing your book structure, consider the task where users most commonly use books, including working through lists, searching for records, and creating and using reports.

Working Through Lists

To help you to identify the lists that users need, determine the types of lists that are most frequently used, and the ideal lists for your users. Ask the users in your company for input to help you to do this. If no book in your book structure contains all the necessary records for an ideal list, the book structure is probably missing a hierarchy. For example, you can set up both a geographic hierarchy and a product-oriented hierarchy.

If users spend a lot of time working in a specific subset of one book, create a subbook for the subset. Name the subbook in a way that allows users to recognize it. The subbook can also be set as the default for the Book selector, so that users do not have to select the appropriate book every time. For more information about setting the default for the Book selector, see [Enabling Books for Users and User Roles](#) (on page 1197).

Searching for Records

To determine the search needs of the users in your company, ask the users about scenarios where they look up particular records. Your book structure and book sizes should reflect the searches and search criteria that users perform most frequently.

NOTE: If you already have a book structure in place, and are further refining it, ask users if they can typically identify that a particular record is part of a particular book in the hierarchy. If the users consistently say that they can be certain only about a book at a higher level, ask them if another subdivision of the book structure would allow them to narrow their search further. Users should be forced to search higher-level books only as an exception to their normal searches.

The fields that are used in a search also affect the speed of the search:

- Using indexed fields to search for records in books results in optimal performance. (Indexed fields are shown in green text in the search sections.)
- When nonindexed fields (rather than indexed fields) are used to search for records in books, searches are slower, and performance is affected by the volume of records that are searched. (Search fields that are not indexed are shown in black text in the search sections.)

For example, if you determine that users typically search contact records based on indexed fields, the number of records for the lowest-level book (called the leaf-node book) might be up to 100,000 for each record type. However, if users typically search contact records based on nonindexed fields, you can restrict the size of your leaf-node books to between 20,000 and 30,000 records for each record type.

Data configuration varies from company to company. As a result, there is no recommended number of records for books. You must manage book size continuously. Books facilitate faster searches by reducing the number of records that are searched.

Creating and Using Reports

All users except administrators are subject to data-visibility rules for reports. When a user book or custom book is specified in the Book selector for reporting, the data considered for the reports is as follows:

- All content in historical analyses (including historical analyses accessed from the Reports and Dashboards tabs, and reports embedded in record Homepages) is restricted to the book and includes all sublevels of the selected book. Records that the user owns, or where the user is a member of a team, are not included unless those records are also in the selected book or one of its subbooks.
- Real-time reporting is restricted to data directly associated with the book (custom book or user book) selected in the Book selector. If the selected book has subbooks or subordinates, the data in the subbooks or subordinates is ignored in real-time reports.

NOTE: Although you do not typically need to change your book structure after you set it up, you can do so. No downtime is required to make such changes, and the changes are applied immediately. However, the changes are not immediately reflected in the data in real-time reports.

For more information about visibility to records in reports, see [Reports](#) (on page 675).

Manager Visibility

When you are designing your book hierarchies, base your designs on the following principles:

- The functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.

The Manager Visibility Enabled option allows managers to access the records of the users who report to them, and allows users to include data in subbooks in their searches.

- The Include Sub-Items option is seldom or never used in searches of large data volumes. (The number of records that constitutes a large data volume differs from company to company and according to search patterns.)

There are cases where it is necessary to use the Include Sub-Items option. For example, managers need to run lists on user books that include their subordinates, because their subordinates cannot share data with each other. If the volumes are large, then the search time increases. However, for optimal performance, select the Include Sub-Items option only when necessary.

Hierarchy Levels

Book hierarchies that have large numbers of levels, with records at every level, behave in a similar way to the team functionality where manager visibility is enabled. Such hierarchies perform well with small data sets. However, as data volumes grow, books with fewer levels in the hierarchy (or with no hierarchy levels) perform far better than team functionality.

If one level of your book hierarchy provides no additional value to data security or data organization, merge the redundant book and its subbooks. Ask book users if they can typically identify whether a record is in one subbook or another subbook of the same parent book; if they cannot, it indicates that the best option is to collapse the two subbooks into the parent book.

A simple method of reducing the number of levels in a book hierarchy is to prefix subbooks with the name of the parent book. For example, if you have a subbook called North with a parent book called North America, remove the parent book, and rename the subbook as NA – North.

Cross-Listing

Cross-listing is the practice of duplicating records across multiple books. Cross-listing has an administrative overhead for users, because synchronization is required, resulting in many read-write operations that affect the server's performance. Keep cross-listing to a minimum.

Automated Book Management

Typically, book assignment criteria are mapped to one or more fields in a record type. You can create workflow rules to automatically reorganize the book assignment when one of those fields changes.

For example, if you have a book hierarchy called *Territory*, you can create a workflow rule to monitor a field in a record type (for example, the Territory field on accounts), and then create an Assign a Book action on the rule to update the Territory book on the record with a new book when the Territory field value on the account changes.

About Web Services Support for Books

Books can be managed through Web services. When books are enabled for your company, the Book Web services description language (WSDL) is available for download. For more information about Web services, see *Oracle Web Services On Demand Guide*.

Process of Setting Up Books

To set up books for your company, perform the following tasks:

- 1** Contact Customer Care, and ask to have the book functionality turned on for your company.
When Customer Care turns on the book functionality for your company, several controls become available to you in Oracle CRM On Demand. For information about verifying that these controls are available, and that the Administrator role has been set up to use books, see [Verifying Book Setup for the Administrator Role](#) (on page 1186).
- 2** Design your book structure.
For guidelines about designing your book structure, see [About Designing Book Structures](#) (on page 1181).
- 3** (Optional) Create book types and book user roles.
For more information, see [Creating Book Types and Book User Roles](#) (on page 1190).
- 4** Create the books and the book hierarchies.
For more information, see [Creating Books and Book Hierarchies](#) (on page 1190).

- 5** Associate users with books.
For more information, see [Associating Users with Books](#) (on page 1192).
- 6** Enable books for your company.
For more information, see [Enabling Books for Your Company](#) (on page 1196).
- 7** Enable books for users and user roles.
For more information, see [Enabling Books for Users and User Roles](#) (on page 1197).

Related Topics

See the following topics for related information about books and book structures:

- [Book Management](#) (on page 1177)
- [About Web Services Support for Books](#) (on page 1185)
- [Adding Books to Record Detail Page Layouts](#) (on page 1199)
- [Assigning Records to Books](#) (on page 1200)
- [Book Hierarchy Page](#) (on page 1202)
- [Book Fields](#) (on page 1202)

Verifying Book Setup for the Administrator Role

To turn on the book functionality for your company, Customer Care does the following:

- Grants the Manage Books privilege and access to books to the administrator's role
- Sets up the access profile for the administrator to allow access to books

The following procedure describes how to verify that the administrator's role is set up for books.

To verify that the administrator's role is set up for books

- 1** Sign in to Oracle CRM On Demand as a user with the Administrator role.
- 2** In the upper-right corner of any page, click the Admin global link.
- 3** In the User Management and Access Controls section of the Admin Homepage, click the User Management and Access Controls link.
- 4** In the Role Management section, click the Role Management link.
- 5** From the Translation Language list, select your company's primary language.
- 6** Click the Edit link for the Administrator role.
- 7** In the Role Management Wizard, go to Step 2, Record Type Access, and verify that the access to book records is as shown in the following table.

The following table shows the book record access that is required for the Administrator role.

Record Type	Has Access?	Can Create?	Can Read All Records?
Books	Selected	Selected	Selected

- 8** Go to Step 4, Privileges, and verify that the Manage Books privilege is selected.

The following table describes the Manage Books privilege.

Category	Privilege	Description
Admin: Users and Access Controls	Manage Books	Manages Book access, assigns data in bulk to Books, and defines Book related workflows

NOTE: A user, whose role has the Manage Books privilege as well as the appropriate privileges to manage user roles, can grant that privilege to other user roles. As with most administration tasks, it is recommended that the privilege to manage books is granted to company administrators only.

- 9** Navigate back to the User Management and Access Controls page.
- 10** In the Access Profile Management section, click the Access Profiles link.
- 11** From the Translation Language drop-down list, select your company's primary language.
- 12** Verify that the settings for the access profiles are correct, as follows:
- a** Click the Edit link for the Administrator Default Access Profile, and verify that the settings match those shown in the following table.
 - b** Click the Edit link for the Administrator Owner Access Profile, and verify that the settings match those shown in the following table.

The following table shows the required settings that allow users with the Administrator role to manage books in Oracle CRM On Demand.

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Account	Books	Full	Full
Accreditation*	Books	Full	Full
Activity	Books	Full	Full
Allocation*	Books	Full	Full
Application*	Books	Full	Full
Books	Not applicable	Read/Edit/Delete	Read/Edit/Delete
Books	Sub-Books	View	View
Books	User	Full	Full
Business Plan*	Books	Full	Full

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Campaign	Books	Full	Full
Certification*	Books	Full	Full
Contact	Books	Full	Full
Course*	Books	Full	Full
Custom Objects	Books	Full	Full
Deal Registration*	Books	Full	Full
Dealer*	Books	Full	Full
Exam*	Books	Full	Full
Financial Account*	Books	Full	Full
Financial Plan*	Books	Full	Full
Fund*	Books	Full	Full
Household*	Books	Full	Full
Inventory Audit Report*	Books	Full	Full
Inventory Period*	Books	Full	Full
Lead	Books	Full	Full
MDF Requests*	Books	Full	Full
MedEd Event*	Books	Full	Full
Messaging Plan*	Books	Full	Full
Objective*	Books	Full	Full
Opportunity	Books	Full	Full
Partner*	Books	Full	Full
Policy*	Books	Full	Full
Portfolio*	Books	Full	Full
Program*	Books	Full	Full
Sample Lot*	Books	Full	Full
Sample Transaction*	Books	Full	Full
Service Request	Books	Full	Full
Smart Call*	Books	Full	Full

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Solution	Books	Full	Full
Vehicle*	Books	Full	Full

NOTE: Record types marked with an asterisk (*) are not available in the standard edition of Oracle CRM On Demand. The access settings for these record types are relevant only if the record types are available.

The following table describes the controls that are enabled by the Manage Books privilege. You can access each component to verify that all of the necessary controls are available to you.

Component	Controls Enabled by the Manage Books Privilege
Admin Homepage	<ul style="list-style-type: none"> In the User Management and Access Controls section, the Book Management link is available. From this link, you can access the Book Hierarchy page, where you can create, update, and manage books. In the Data Management Tools section, the Batch Assign Book Queue link is available. From this link, you can access the Batch Assign Book Queue page, where details of active and completed requests for batch book assignments are displayed.
Application Customization page	<ul style="list-style-type: none"> In the Record Type Setup section, the Book link is available. From this link, you can access the Book Application Customization page, where you can set up book fields and book user fields, including the picklist values for the Book Type and Book User Role fields.
Role Management Wizard	<ul style="list-style-type: none"> In Step 2, Record Type Access, the Book option appears as a line item. In Step 4, Privileges, the Manage Books privilege appears as an option.
Access Profile Wizard	<ul style="list-style-type: none"> In Step 1, Access Profile Name, the Grantable to Book Users check box appears. In Step 2, Specify Access Levels: <ul style="list-style-type: none"> The Book option appears as a top-level object. A line item for the Book related information section appears under the Related Information link for record types that support books.
Company Profile Page	<ul style="list-style-type: none"> In the Company Data Visibility Settings section of the page, the Enable Books check box appears.
Page Layout Wizard (Layout Management)	<ul style="list-style-type: none"> In Step 4, Related Information, the Book related information section appears in the Available section of the page for all record types that support books.
Rename Record Types Page	<ul style="list-style-type: none"> The Book option appears as one of the items on the page.
Workflow	<ul style="list-style-type: none"> The Assign a Book action appears as an available option (if your role has the Manage Workflow privilege enabled).
Menu on List page	<ul style="list-style-type: none"> Batch Assign Book appears as one of the menu options for supported record types.

Creating Book Types and Book User Roles

To help you to organize your book structure, you can create book types, and then assign a type to each book that you create. For example, if you plan to have a book hierarchy for territories, you can create a book type called Territory. The Book Type field is an editable picklist field that you can customize to meet your company's needs.

You can also create book user roles that you can assign to users when you associate them with books. Book user roles are not the same as Oracle CRM On Demand user roles. For example, you can create book user roles, such as Territory User and Territory Manager, to be assigned to users who work with the territories book hierarchy.

The following procedure describes how to create book types and book user roles.

To create book types and book user roles

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Types Setup section, click Book.
- 4 In the Book Application Customization page, do one of the following:
 - To create book types, click Book Field Setup.
 - To create book user roles, click Book Users Field Setup.
- 5 Click the Edit Picklist link for the field.
- 6 Enter the values for the picklist, and save your changes.

For more information about editing picklist fields, see [Changing Picklist Values](#) (on page 1054).

Creating Books and Book Hierarchies

You create books from the User Management and Access Controls section of the Admin Homepage.

Before you begin:

- To perform this procedure, you must have the Manage Books privilege in your user role.
- Before you start to create your books and book hierarchies, read the topic [About Designing Book Structures](#) (on page 1181).

The following procedure describes how to create a book.

To create a book

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section of the Admin Homepage, click the Book Management link.
- 3 On the Book Hierarchy page, click New.
- 4 On the Book Edit page, enter the required information, and then save your record.

The following table describes the information you must enter for the book.

Field	Description
Book Name	For display purposes in the Book selector, the recommended maximum length of a book name is 60 characters.
Book Type	(Optional) Select the book type from the picklist.
Parent Book	<ul style="list-style-type: none"> ■ If this is a root book, leave this field blank. ■ If this is a subbook, click the Lookup icon next to the Parent Book field, and select the parent book.
Can Contain Data	<p>Applies only to the current book, not to any subbooks. Select this check box if records will be associated with this book. For performance reasons, apply this feature only to books that contain data.</p> <p>NOTE: In the Book selector, which appears throughout Oracle CRM On Demand, custom books containing data are identified by a blue document icon. Custom books that cannot contain data are identified by a yellow folder icon.</p>

- 1 Save the record.

Creating Subbooks

If you want to create subbooks for an existing parent book, you can create the subbooks using the method in the previous procedure, or you can create subbooks as described in the following procedure.

To create subbooks for an existing book

- 1 On the Book Hierarchy page, click the link for the parent book.
- 2 On the Book Details page, click New in the Sub-Books title bar.
- 3 On the Book Edit page, enter the information for the book, and save your changes.

Moving a Book to a New Parent Book

You can change a book to make it a subbook of another book, or you can move a subbook from one parent book to another. When you change the parent of a book, the book hierarchy changes as follows:

- The new parent applies to the current book and any subbooks that are children of the current book.
- Any users assigned to the old parent book lose access to the current book and its subbooks.
- Any users assigned to the new parent book gain access to the current book and its subbooks.
- Any users assigned directly to the current book are unaffected by the change in the parent book.

NOTE: If you want to delete a parent book, you must first remove all its subbooks, users, and data.

TIP: To find out how many records a specific book contains, create a historical report for each record type. For information about creating reports, see [Reports](#) (on page 675).

The following procedure describes how to move a book to a new parent book.

To move a book to a new parent book

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section of the Admin Homepage, click the Book Management link.
- 3 On the Book Hierarchy page, click the Edit link for the book that you want to change.
- 4 Click the Lookup icon next to the Parent Book field, and select the new parent book.
- 5 Save your changes.

Associating Users with Books

You can define which users can access a book, and the level of access that each user has to records in the book. When you associate a user with a book, you specify the access profile for the user when working in the book. The following standard options are available:

- **Edit.** Allows the user to read and update the records in the book.
- **Full.** Allows the user to read, edit, and delete the records in the book.
- **ReadOnly.** Allows the user to view the records in the book.

You can also create custom access profiles for books. The Access Profiles picklist on the Book Users Edit page includes all access profiles that have the Grantable to Book Users option selected on them. For information on how to create custom access profiles for books, see [Creating Access Profiles for Books](#) (on page 1195).

The Manager Visibility Enabled option on the Company Profile page and the Include Sub-Items option in the Book selector are additional factors in determining a user's access to records. When the Manager Visibility Enabled check box is selected on the Company Profile page, the Include Sub-Items setting on searches allows a user to access data in subbooks and to access data directly or indirectly owned by subordinate users.

The level of access that a user has to books affects the user's overall access rights to records. The following examples show how the user's access rights are determined.

Example 1

Ryan Taylor, a sales representative, has the following setup in Oracle CRM On Demand:

- Has access to account records through the sales representative role.
- Has the access level on his owner access profile set to ReadOnly for the account record type
- Has the access level on his default access profile set to ReadOnly for the account record type
- Is not a member of the account team for the ABC Widgets account
- Is associated with the Widget Makers book, with his access profile for the book set to Full

If the ABC Widgets account is in the Widget Makers book, Ryan's access rights to the ABC Widgets record allow him to read, edit, and delete the record. He has these access rights, because the access control system in Oracle CRM On Demand calculates the most liberal rights from all of the relevant access profiles and applies them. In this case, the access profile for the book is set to Full, and therefore supersedes the access profile for account records.

Example 2

Tanya Lee, a sales representative has the following setup in Oracle CRM On Demand:

- Has access to opportunity records through the sales representative role.
- Has the access level on her owner access profile set to ReadOnly for the opportunity record type
- Has the access level on her default access profile set to ReadOnly for the opportunity record type
- Is a member of the opportunity team with the Opportunity Access field set to Edit
- Is associated with the Widget Makers book, with her access profile for the book set to Full

If an opportunity is in the Widget Makers book, Tanya's access rights allow her to read, edit, and delete the record. However, if an opportunity is not in the Widget Makers book, Tanya's access rights (from her owner access profile, her default access profile, and her membership of the opportunity team) allow her to read and edit the opportunity, but she cannot delete the opportunity.

Methods of Associating Users with Books

There are two methods of associating users with books. From a book record, you can associate multiple users with the book. From a user record, you can associate multiple books with the user.

The following procedure describes how to associate multiple users with a book through the book record.

To associate multiple users with a book

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Book Management link.
- 3 On the Book Hierarchy page, click the name link of the book with which you want to associate users.
- 4 On the Book Details page, on the title bar of the Book Users section, click Add Users.

- 5 In the Book Users Edit page, pick the users whom you want to associate with the book.

The following table describes the information that you must specify for each user you associate with the book.

Field	Description
Users	Click the Lookup icon next to the User field and then select the user. NOTE: A user's delegates do not automatically get access to a user's book. You must also associate each delegate with the book.
Book User Role	(Optional) Select the role from the picklist. NOTE: The book user role is not an Oracle CRM On Demand role. For information about creating book user roles, see Creating Book Types and Book User Roles (on page 1190).
Access Profile	From the list of profiles that are enabled for books, select the access profile that determines the user's access rights to the current book and any subbooks. The standard options are: <ul style="list-style-type: none"> ■ Edit. Allows the user to read and update the records in the book. ■ Full. Allows the user to read, edit, and delete the records in the book. ■ ReadOnly. Allows the user to view the records in the book. NOTE: For information about creating custom access profiles for books, see Creating Access Profiles for Books (on page 1195).

The following procedure describes how to associate multiple books with a user through the user record.

To associate multiple books with a user

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the User and Group Management section, click the User Management link.
- 4 In the User List, click the last name of the user with whom you want to associate books.
- 5 On the User Detail page, on the title bar of the Assigned Books section, click Add Books.

NOTE: If the Assigned Books section is not available on the User Detail page, click the Edit Layout link, and add the section to the page layout.
- 6 On the Assigned Books Edit page, pick the books that you want to associate with the user, and specify the user information for each book.

The following table describes the information that you must specify for each book that you associate with the user.

Field	Description
-------	-------------

Field	Description
Book Name	Click the icon to the right of the Book Name field, pick a book in the Book selector, and click OK.
Book User Role	(Optional) Select the role from the picklist. NOTE: The book user role is not an Oracle CRM On Demand role. For information about creating book user roles, see Creating Book Types and Book User Roles (on page 1190).
Access Profile	From the list of profiles that is enabled for books, select the access profile that determines the user's access rights to the current book and any subbooks. The standard options are: <ul style="list-style-type: none"> ■ Edit. Allows the user to read and update the records in the book. ■ Full. Allows the user to read, edit, and delete the records in the book. ■ ReadOnly. Allows the user to view the records in the book. NOTE: For information about creating custom access profiles for books, see Creating Access Profiles for Books (on page 1195).

NOTE: Associating a user with a book does not allow the user to access the book. To allow users to access books, you must enable books for each user, and each user role that wants access to books, as described in [Enabling Books for Users and User Roles](#) (on page 1197).

Creating Access Profiles for Books

When you associate a user with a book, you select an access profile that determines the user's access rights to records in the book and in any subbooks. The access profile for the book is evaluated with all of the other access profiles for the user, and the user is given the most liberal access rights to a record that the access profiles permit. For more information about how the access profiles interact, see [Associating Users with Books](#) (on page 1192).

The standard access profiles available for selection when associating a user with a book are as follows:

- **Edit.** Allows the user to read and update the records in the book.
- **Full.** Allows the user to read, edit, and delete the records in the book.
- **ReadOnly.** Allows the user to view the records in the book.

You can also create custom access profiles for books. The Access Profiles picklist, which appears on the Book Users Edit page and on the Assigned Books Edit page, includes all access profiles that have the Grantable to Book Users option selected.

The following procedure describes how to create an access profile for books.

To create an access profile for books

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.

- 3 In the Access Profile Management section, click the Access Profiles link.
- 4 Create a new access profile, or edit an existing access profile.
- 5 In Step 1 of the Access Profile wizard, select the Grantable to Book Users check box.
- 6 In Step 2, Specify Access Levels, specify the levels of access for each record type and for the related information types.
- 7 When you finish creating or editing the Access Profile, click Finish to save your changes.

Enabling Books for Your Company

When you have set up your book structures, you can enable books for your company. The following procedure describes how to enable books for your company.

To enable books for your company

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 On the Company Profile page, set the following options. For more information about these options, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).
 - a In the Company Settings section, ensure that the Global Search Method is set to Targeted Search. When Targeted Search is selected, the Book selector appears in the search section of the Action bar.
 - b In the Analytics Visibility Setting section, set the Historical Subject Areas option to Full Visibility. (This setting ensures that the data in books is synchronized with the data in the database that supports reports and dashboards.)
 - c In the Company Data Visibility Settings section, ensure that the following check boxes are selected:

Setting	Purpose
Enable Books	<p>Use this field to control whether the Book selector displays custom books and user books. If the Enable Books check box is not selected, the Book selector displays only user books and books for delegates if delegates exist.</p> <p>NOTE: To see the Enable Books option in the Company Profile page, you must have the Manage Books privilege in your user role.</p> <p>CAUTION: You cannot clear this check box after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.</p>

Setting	Purpose
Display Book Selector	Enables the Book selector that users can use to filter records by user, delegate, or custom book.

Enabling Books for Users and User Roles

To enable a user to use books, you configure the user's role and the default access profile for the user's role. You also configure the user record for each user.

The following procedure describes how to enable books for a user role. You must perform these steps for each role that uses books.

To enable books for a user role

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the Role Management section, click the Role Management link.
- 4 From the Translation Language list, select your company's primary language.
- 5 Click the link for the role that you want to modify.
- 6 In the Role Management Wizard, go to Step 2, Record Type Access, and configure the access levels for the Books record type.

The following table shows the settings you must configure to allow users (who are not administrators) to access books.

Record Type	Has Access?	Can Create?	Can Read All Records?
Books	Selected	Not selected	Not selected

NOTE: You must ensure that the Can Read All Records check box is not selected. Otherwise, the user can access all books in the Book Hierarchy list page.

- 7 Click Finish to save your changes.
- 8 Navigate to the User Management and Access Controls page.
- 9 In the Access Profile Management section, click Access Profiles.
- 10 From the Translation Language list, select your company's primary language.
- 11 Click the Edit link for the Default Access Profile that is used for the user role you are enabling for books, and configure the settings to provide access to books and related record types.

The following table describes the required settings on the Default Access Profile for a user role, which enable access to books for the role. Configuring the default access profile gives the user role the necessary access to books. Therefore, you do not have to configure the owner access profile for the role.

Record Type	Related Record	Default Access Profile
Books	Not applicable	ReadOnly.
Books	Sub Book	View. This profile allows the user to see all subbooks in the Book Detail page. The default is No Access.
Books	User	Read-Only. This profile allows the user to see all other users who are associated with the book in the Book Detail page. The default is No Access.

12 Click Finish to save your changes.

The following procedure describes how to enable books for a user. You must perform these steps for each user who uses books.

To enable books for a user

- 1 In the upper-right corner of any page, click the Admin global link
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the User Management section, click the User Management link.
- 4 Click the Edit link for the user whose profile you want to modify.
- 5 In the Key User Information section of the User Edit page, configure the following settings:
 - **Default Book for Analytics.** This setting determines the user book or custom book that appears by default for the user in the Book selector on the Reports Homepage and the Dashboards Homepage. The setting displays the user name and sign in ID (by default) of the user whose record you are editing. Change the setting of the record to the custom book or user book where the user most frequently works for reports and dashboards. The setting on the user record does not limit the user's access to data: the user can select a different book or user in the Book selector.
 - **Default Book.** This setting determines the user book or custom book that appears by default for the user in the Book selector when working in any area other than Reports or Dashboards. The setting displays All by default. Change the setting to the custom book or user book where the user most

frequently works, so that the user does not have to select the book each time the user wants to work on data in the book. The setting on the user record does not limit the user's access to records: the user can select a different book or user in the Book selector.

6 In the User Security Information section of the User Edit page:

- a** Set the value for Reporting Subject Areas to either Manager Visibility or Team Visibility.

NOTE: You must select one of these values. Otherwise, reports will not contain any data. The option that you select, Manager Visibility or Team Visibility, does not affect the data in the report.

- b** Set the value for Historical Subject Areas to Full Visibility.

7 Click Save.

NOTE: To access a book, the user must be associated with the book. In addition, a user's delegates do not automatically have access to a user's books. The delegates must also be associated with the books.

Adding Books to Record Detail Page Layouts

To make the Books related information section available for users on the detail page for a record type, you must configure the following:

- Make the Books related information section available in the record type page layout for the user role.
- On the access profile for the user role, give the user role access to Books as a related information section on the record type.

The following procedure describes how to make the Books related information section available in a record type page layout.

To make the Books related information section available in a record type page layout

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** Click the Application Customization link.
- 3** In the Record Type Setup section, click the link for the required record type.
For example, if you want to make the Books related information available on the Opportunity Detail page, click the Opportunity link.
- 4** In the Page Layout section, click the required Page Layout link (for example, Opportunity Page Layout).
- 5** In the record type Page Layout page, click the Edit link for the page layout where you want to make the Book related information section available.
- 6** In the Page Layout wizard, go to Step 4, Related Information, and click the arrows to move the Books item to the Displayed section.
- 7** Click Finish to save your changes.

- 8 Sign out of Oracle CRM On Demand, and then sign in again.

The following procedure describes how to give a user role access to Books as a related information section on the record type.

To give a user role access to Books as a related information section on a record type

- 1 In the upper-right corner of any page, click the Admin global link
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the Access Profile Management section, click Access Profiles.
- 4 Click the Edit link for the Default Access Profile that is used for the user role where you want to make the Books related information section available.
- 5 In the Access Profile wizard, go to Step 2, Specify Access Levels, and click the Related Information link for the record type where you want to make the Books related information section available.
For example, if you want to make the Books related information available on the Opportunity Detail page, click the Related Information link beside the Opportunity record.
- 6 Select the access level for Books according to the requirements of the user role.
- 7 Click Finish to save your changes.
- 8 Repeat steps 4 through 7 for the Owner Access Profile that is used for the user role you are enabling for books.

Assigning Records to Books

You can assign records to books in the following ways:

- One record at a time (manually), by selecting the book value on the record Detail page
- In bulk, using the batch record update functionality

Records can also be assigned to books using active workflow rules and conditions. For information about using workflow rules, see [About Workflow Rules](#) (on page 1212).

Before you begin:

- To assign records to books on a record Detail page, the Detail page layout for the record type must include the Book section.
- To batch assign records to books, you must have the Manage Books privilege in your user role.

The following procedure describes how to assign a single record to a book.

To assign a single record to a book

- 1 Navigate to the Detail page for the record.
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- 2 On the title bar of the Books section of the Detail page, click Add.
- 3 In the book selector, choose the book to which you want to assign the record, and click OK.

The following procedure describes how to batch assign records to books.

To batch assign records to books

- 1 In the list window, click the Menu button on the title bar, then click Batch Assign Book.
- 2 In the Batch Assign Book window, click the selector button beside the Target Book box then, in the Book lookup, choose the book to which you want to assign records.
- 3 Choose an Assignment Option for the records in the list.

The following table describes the Assignment Options that you can select.

Option	Description
Add	Adds the Target Book to all records. This assignment does not affect any previous book assignment for the records.
Replace Type	Adds the Target Book to all records and removes any previously assigned books that have the same type as the Target Book. NOTE: Book Types are defined by your company administrator.
Replace All	Adds the Target Book to all records and removes all previously assigned books, regardless of type.
Replace Book	Specifies the book that you want to replace. Reassigns records from the book you specify here to the Target Book. Other records are not affected.
Remove	Removes the existing assignment to the Target Book from all records.
Remove All	Removes all assigned books from the records.

- 4 If you choose any option other than Add in step 3, you must now choose an Apply To option.

The following table describes the Apply To options that you can select.

Option	Description
Manual Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made manually
Automatic Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made by

Option	Description
	workflow or batch
Both	Applies the Assignment Option to all selected records

- 5 To apply your chosen assignment criteria, click Assign.

The Batch Assign Book Queue window opens, showing your assignment request in the Active Requests section. For more information, see [Batch Assign Book Queue Page](#) (on page 1464).

When your request has been processed, you will be notified by email.

Book Hierarchy Page

The Book Hierarchy page shows information about custom books. You can view subsets of books or view all books.

The following table describes the tasks that you can perform from the Book Hierarchy page.

To do this	Follow these steps
View a different subset of books	On the Book Hierarchy title bar, click the list and change the selection to a different subset of books, or select All Books to view all books.
Create a book	On the Book Hierarchy title bar, click New. In the Book Edit page, enter the required information, and save the record.
Create a subbook for an existing book	Click the name link for the parent book. On the Book Details page, click New in the Sub-Books title bar. On the Book Edit page, enter the information for the book, and save your changes.
Move a book to a new parent book	Click the Edit link for the book that you want to change. In the Book Edit page, click the Lookup icon next to the Parent Book field, select the new parent book, and then save your changes.
Associate users with a book	Click the name link of the book. On the Book Details page, click Add Users in the Book Users title bar. On the Book Edit page, pick the users whom you want to associate with the book, and specify the user information. For more information, see Associating Users with Books (on page 1192).

Book Fields

The Book Edit page and the Book Detail page show details of custom books. You can change the details of a book, add subbooks to a book, and add users to a book.

The following table provides additional information regarding some fields.

Field	Description
Key Book Information	
Book Name	The name given to the book.
Parent Book	Shows the name of the parent book if the book is a subbook. If the book is a root book, this field is blank.
Book Type	Books can be assigned a book type to help organize book structures. For information about creating book types, see Creating Book Types and Book User Roles (on page 1190).
Can Contain Data	Indicates if records can be associated with this book. For performance reasons, books that do not contain data must not have this check box selected.
Partner	Specific to Oracle CRM On Demand for Partner Relationship Management. For more information, see <i>Oracle CRM On Demand for Partner Relationship Management Configuration Guide</i> in the Oracle CRM On Demand documentation library (see Oracle CRM On Demand documentation library - http://www.oracle.com/technology/documentation/siebelcrmod.html) on Oracle Technology Network.
Partner Location	Specific to Oracle CRM On Demand for Partner Relationship Management. For more information, see <i>Oracle CRM On Demand for Partner Relationship Management Configuration Guide</i> in the Oracle CRM On Demand documentation library (see Oracle CRM On Demand documentation library - http://www.oracle.com/technology/documentation/siebelcrmod.html) on Oracle Technology Network.
Sub-Books Section	
Book Name	The name of a book that is a subbook of the current book.
Book Type	The book type of the subbook.
Can Contain Data	Indicates if records can be associated with the subbook.
Book Users Section	
Last Name	The last name of a user associated with this book.
First Name	The first name of a user associated with this book.
Book User Role	The user's book role for the current book. A book user role can be assigned to a user when the user is associated with a book. Book user roles are not user roles in Oracle CRM On Demand. For information about creating book user roles, see Creating

Field	Description
	Book Types and Book User Roles (on page 1190).
Access Profile	The user's access rights to the current book and any subbooks. Select from the list of profiles that are enabled for books. For information about creating access profiles specifically for books, see Creating Access Profiles for Books (on page 1195).

Information about Troubleshooting Books

For more information about troubleshooting book functionality, see 565278.1 (Article ID) on My Oracle Support.

Group Management

Group Management is an optional feature that gives your company the ability to set up teams of people who work together, allowing them to share a common set of information.

Setting up groups at your company allows users to do the following:

- Group members can access a merged calendar, showing the availability for all members in their group. This allows employees to determine the best time to schedule appointments and to notify employees (and contacts) of appointments.

NOTE: Users must have the Share Calendar privilege assigned to their role to be able to access the merged group calendar. Users who have the Share Calendar privilege can also set up custom calendar views. For more information, see [Viewing Others' Calendars](#) (on page 139) and [Adding Custom Calendar Views](#) (on page 142).

- Group members can share ownership of the following record types automatically:

- Activity
- Account
- Contact
- Household
- Opportunity
- Portfolio

The new records that any member in the group creates are jointly owned by all members in the group. For example, if an employee belongs to group XYZ, an account that employee creates appears in the account lists for all members in that group. On that account record, the employee's name appears in the Owner field, the group name appears in the Primary Group field (if the company administrator added this field to your layout), and all group members can update the record.

By default, the current group's members have full access to group records that were created after the member joined the group. The details about appointment, task, and contact records that are marked Private cannot be read by other group members.

NOTE: For this functionality to work, the Default Group Assignment option in the Company Profile page must be selected. The option must be selected before the groups are created. For more information, see [Setting Up Groups](#) (on page 1206).

This behavior applies to groups:

- Each user can belong to only one group.

After a user is added to a group, his name no longer appears on the user list when selecting group members.

- If you select the group assignment option at your company:
 - Records that exist before a group is defined are not updated unless the Owner field is updated with a new owner belonging to a group.
 - When a user joins a group, the user gains access to the group's records. However, records owned by the new group member prior to the user joining the group are not automatically visible to the existing group members. If a user becomes the owner of records after the user is added to a group, the new records are visible to other group members.

The following example illustrates group record ownership:

- User 1 and User 2 belong to Group 1. User 3 does not belong to Group 1.
 - User 3 owns Account 31. User 1 and User 2 will not have access to Account 31.
 - User 3 is added to Group 1. User 1 and User 2 still will not have access to Account 31.
 - User 3 becomes owner of Account 32. User 1 and User 2 will have access to Account 32.
- If users are deleted from a group, they are removed from all shared records that the group owns. They retain access to their private records.

Groups versus Teams

The application distinguishes between *Groups* and *Teams*:

- Groups are set up by the company administrator and apply to entire sets of records across the company. The Group feature must be enabled by Customer Care or by the company administrator when the company is set up for Oracle CRM On Demand.
- The record owners or company administrators set up teams. Teams apply to only those record types that allow teams, including:
 - Account
 - Accreditation
 - Application
 - Business Plan
 - Certification
 - Contact
 - Course
 - Custom Objects
 - Deal Registration

- Exam
- Household
- Lead
- MDF Request
- Objective
- Opportunity
- Partner
- Portfolio
- Service Request
- Special Pricing Request

To set up a team to access the record, the owner must explicitly share that record using the Team section on the record Detail page.

For information on setting up groups, see [Setting Up Groups](#) (on page 1206).

Related Topics

See the following topics for related information about groups and sharing calendars:

- [Viewing Others' Calendars](#) (on page 139)
- [Adding Custom Calendar Views](#) (on page 142)

Setting Up Groups

Before you begin. Do the following:

- Make sure your role includes the Manage Users and Access privilege.
- To understand how groups work, see [Group Management](#) (on page 1204).

Sequence for Setting Up Groups and Importing Users

When setting up groups, follow this sequence:

- 1 Turn on the Default Group Assignment feature.

CAUTION: Before you set up or change a group, the Default Group Assignment feature must be turned on (that is, the Default Group Assignment option in the Company Profile page must be selected), even if you do not plan to use the default group assignment functionality. If you do not turn on this feature before you set up or change a group, the group will not perform correctly. If that happens, you must delete the group, turn on the Default Group Assignment feature, and then create the group again.

- 2 Create groups and assign users to the groups.

- 3 If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, turn off the Default Group Assignment feature when you have finished creating the groups and adding members to the groups.
- 4 Import your records with the default Owner (user), which will propagate groups to the records.

To turn on the default group assignment feature

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Company Administration link.
- 3 Click the Company Profile link.
- 4 On the Company Profile page, click Edit.
- 5 In the Company Data Visibility Settings section, select the Default Group Assignment check box.
- 6 Save the settings.

To set up a group

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, in the User and Group Management section, click the Public Sharing Groups link.
- 4 On the Group List page, click New Group.
- 5 On the Group Edit page, complete the required fields.

Field	Description
Name	Limit of 50 characters. Required field by default.
Description	Limit of 255 characters.

NOTE: You can rename the group without affecting existing records, since the application uses the underlying group ID to track group records, not the group name. However, your group name needs to be unique within your company.

- 6 Click Save.
- 7 On the Group Detail page, click Add Members.
- 8 On the Group Members page, click the Lookup icons and add users.

Only users who have not been assigned to a group appear on the list. To determine which group a user belongs to, you need to go to that user's Detail page.

- 9 Save the record.
- 10 If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, turn off the Default Group Assignment feature when you have finished creating the groups and adding members to the groups.

To turn off the Default Group Assignment feature, do the following:

- a In the upper right corner of any page, click the Admin global link.
- b Click the Company Administration link.
- c Click the Company Profile link.
- d On the Company Profile page, click Edit.
- e In the Company Data Visibility Settings section, clear the Default Group Assignment check box.
- f Save the settings.

If you later decide to make changes to the groups or group membership, you must turn on the Default Group Assignment feature again before you make the changes, and then turn it off when you have finished making your changes.

About Changing the Default Group Assignment Setting

If your company decides to no longer use groups, you should follow this sequence before turning off the Default Group Assignment feature:

- 1 Delete all users except for the one you want to be the Primary Owner of the group's records.
- 2 Delete the group.
- 3 Clear the Default Group Assignment check box on the company profile.

Related Topics

See the following topics for related information about groups and sharing calendars:

- [Group Management](#) (on page 1204)
- [Viewing Others' Calendars](#) (on page 139)
- [Adding Custom Calendar Views](#) (on page 142)

Territory Management

You can set up territories and territory hierarchies. For example, a company might organize its sales force into groups or territories. The territories might be based on geography, products, or industries. Each sales group is responsible for handling the accounts and sales opportunities in its territory. You can use the territories that you set up in Oracle CRM On Demand as the basis for assigning new account and opportunity records. For information on setting up territories, see [Setting Up Territories](#) (on page 1209).

Setting Up Territories

Before you begin:

- If your territories have not already been defined at your company, determine the naming convention and hierarchy before setting up the information in Oracle CRM On Demand. When entering the information, start from the top level, and then add the subterritories.
- To perform the following procedures, your role must include the Manage Territories privilege.

The following procedure describes how to set up a territory.

To set up a territory

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Territory Management link.
- 3 On the Territory Hierarchy page, do one of the following:
 - To add a territory, click New Territory.
 - To update territory information, click the appropriate link in the Territory Name column, and then, on the Territory Detail page, click Edit.
- 4 On the Territory Edit page, enter the required information.

Field	Description
Territory Name	Limit of 50 characters.
Parent Territory	If this is a top-level territory, leave this blank.
Current Quota	You can enter a quota assigned to this territory.
Territory Currency	Inherits your company's default currency.

- 5 Save the record.
- 6 (Optional) On the Territory Detail page, click New in the Child Territories title bar to add subterritories.

To update the parent territory

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Territory Management link.
- 3 On the Territory Hierarchy page, select the child territory.
- 4 On the Territory Detail page, click Edit.

- 5 On the Territory Edit page, click the Lookup icon next to the Parent Territory field.
- 6 In the Lookup window, select the parent account.
- 7 Save the record.

To update records with territory

There are several ways to update the territory field on a record. Typically, this is an automated process:

- **Assignment Manager:** You can use Assignment Manager to populate this field and the related owner and team members for the record.
- **Import:** When you want to update territory ownership on many records, set the reassign owner flag to trigger the assignment of records using Assignment Manager.
- **Manual:** A user can assign their territory to a record.

Business Process Management

Click a topic to see step-by-step instructions to do the following:

- [Creating Workflow Rules](#) (on page 1221)
- [Restricting Workflow Rules to Specific Channels or Roles](#) (on page 1225)
- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Changing the Order of Workflow Rules](#) (on page 1243)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)
- [Viewing Workflow Instances](#) (on page 1249)
- [Deleting Instances from the Workflow Monitor](#) (on page 1250)
- [Setting Up Assignment Rules](#) (on page 1257)
- [Mapping Additional Fields During Lead Conversion](#) (on page 1264)
- [Creating Lead Conversion Layouts](#) (on page 1264)
- [Setting Up the Forecast Definition](#) (on page 1267)

- [Updating the Forecast Definition](#) (on page 1273)
- [Setting Up Sales Processes, Categories, and Coaches](#) (on page 1274)
- [Customizing Your Company's Industry List](#) (on page 1281)

Related Topics

See the following topics for related information:

- [About Assignment Rules](#) (on page 1253)
- [Lead Conversion Administration](#) (on page 1262)
- [Workflow Configuration](#) (on page 1211)
- [Workflow Monitor](#) (on page 1247)

Workflow Configuration

To configure workflow rules to meet your company's business requirements, do the following:

- 1 Work with all the stakeholders to plan the business processes.
- 2 Document all of the workflow rules and the corresponding workflow actions that you must configure. For more information about the components of workflow rules, see [About Workflow Rules](#) (on page 1212).
- 3 Sign in to Oracle CRM On Demand as the company administrator, and create the workflow rules. For more information, see [Creating Workflow Rules](#) (on page 1221).
- 4 Within the new workflow rules, define all the required workflow actions. For information about creating the various types of workflow actions, see the following topics:
 - [About Workflow Actions](#) (on page 1218)
 - [Creating Workflow Actions: Assign a Book](#) (on page 1225)
 - [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
 - [Creating Workflow Actions: Create Task](#) (on page 1228)
 - [Creating Workflow Actions: Send Email](#) (on page 1233)
 - [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
 - [Creating Workflow Actions: Update Values](#) (on page 1238)
 - [Creating Workflow Actions: Wait](#) (on page 1240)
 - [Deactivating Workflow Rules and Actions](#) (on page 1244)
 - [Deleting Workflow Rules and Actions](#) (on page 1246)

About Workflow Rules

A *workflow rule* is an instruction to Oracle CRM On Demand to perform one or more actions automatically each time a specified event occurs.

About Setting Up Workflow Rules Functionality

If you are a new customer, the workflow rules functionality is automatically enabled. However, if you are an existing customer, Customer Care and your company administrator must configure the Oracle CRM On Demand workflow rules functionality:

- **Customer Care setup.** When Customer Care sets up workflow rule functionality, the Workflow Configuration link is visible in the Business Process Management section of the Admin Homepage. Also, the Administrator user role has the Manage Data Rules - Manage Workflow Rules privilege enabled. For more information about user roles, see [Adding Roles](#) (on page 1173).
- **Enable Workflow option.** Workflow rules cannot be executed until the company administrator selects the Enable Workflow check box on the Company Profile page. For information about configuring your company profile, see [Setting Up Your Company Profile and Global Defaults](#) (on page 996).
- **Integration events.** An *integration event* is a mechanism for triggering external processes that are based on changes (create, update, delete, associate, dissociate) to the records in Oracle CRM On Demand. You can specify which fields on a record that you want to track. If your company wants to use workflow rules to create integration events, contact Customer Care to request support for Integration Event Administration and to specify the total size of the integration event queues that you require. When the value changes in a tracked field, the change is recorded in the integration event. You can also specify to which integration event queues the integration events are added. For more information about managing integration events, see [About Integration Events](#) (on page 1464).
- **Books.** If your company wants to use workflow rules to update the associations between records and books, contact Customer Care to request support for Book Management. For more information about book management, see [Book Management](#) (on page 1177).

Trigger Events and Actions on Workflow Rules

A workflow rule is evaluated when the event specified on the rule (the trigger event) occurs. If the conditions on the rule are met (or if there are no conditions on the rule), the actions specified on the rule are performed. For example, you can create a workflow rule to specify that when an opportunity is created (the workflow rule trigger event), an email is sent to the opportunity owner's manager (the workflow rule action). You can also specify that the email is sent only if the revenue on the opportunity is in excess of a certain amount (the workflow rule condition), and you can specify the content of the email.

You can also configure workflow rules so that actions are performed when a specified period of time has passed, or when a specified date and time is reached. For more information about time-based workflow actions, see [About Time-Based Workflow Rules](#) (on page 1219).

Workflow rules can be triggered by one of the following:

- A record is created, updated, or deleted.
- A record is associated with another record or dissociated from another record.

Association and dissociation workflow rule triggers are supported only for associations between accounts and contacts and between opportunities and contacts.

Workflow rules are configured for a record as a whole, and not for individual fields. There are several types of trigger events for workflow rules, but each workflow rule has only one trigger event. Depending on the trigger event you select for the rule, you can specify that Oracle CRM On Demand is to perform one or more actions automatically when the workflow rule conditions are met.

NOTE: After a rule is created, you cannot change the record type or trigger event on the rule. However, you can update the workflow condition.

The trigger event for each rule is shown on the Workflow Rules List Page and on the Workflow Rule Detail page. The following table shows the actions that are available for each trigger event.

Trigger Event	Available Actions
When New Record Saved	<ul style="list-style-type: none"> Send Email Create Task Assign a Book Create Integration Event Wait Update Field After Wait
When Modified Record Saved	<ul style="list-style-type: none"> Send Email Create Task Assign a Book Create Integration Event Wait Update Field After Wait
Before Record Is Deleted	<ul style="list-style-type: none"> Send Email Create Task Create Integration Event Wait
Before Modified Record Saved	<ul style="list-style-type: none"> Update Values
After Association With Parent	<ul style="list-style-type: none"> Send Email Create Integration Event Wait
After Dissociation From Parent	<ul style="list-style-type: none"> Send Email Create Integration Event Wait
When Record Is Restored	<ul style="list-style-type: none"> Send Email Create Task

Three additional workflow actions are available only in Oracle CRM On Demand for Partner Relationship Management:

- Partner Book Sync
- Book Partner Sync
- Owner Partner Account Sync

For more information on these actions and how you can use them, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*, available from the [Oracle CRM On Demand documentation library](http://www.oracle.com/technology/documentation/siebelcrmod.html) (see Oracle CRM On Demand documentation library - <http://www.oracle.com/technology/documentation/siebelcrmod.html>) on Oracle Technology Network.

Restrictions That Apply to Workflow Rules and Rule Actions

The following restrictions apply to workflow rules and rule actions:

- **Workflow rule conditions.** If you define conditions on a workflow rule, the workflow rule actions are performed only if the rule conditions are met when the rule is triggered. If the conditions are not met, the actions are not performed. If you do not define any conditions on a workflow rule, the workflow rule actions are performed each time the rule is triggered.
- **Multiple actions on workflow rules.** You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule. If you try to create more than 25 actions on a rule, you receive an error message. Where there are multiple actions on a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule. For more information about workflow actions, see [About Workflow Actions](#) (on page 1218).

NOTE: If a workflow action terminates unexpectedly without being completed, any remaining actions on the rule are not performed.

- **Record types.** You can create workflow rules for a number of record types. However, each workflow rule applies to only one record type. This means that if you create a workflow rule for a specific record type and you want the same action to occur for another record type, you must create a second workflow rule (with the same trigger event, rule conditions, and action) for the second record type.
- **Single-record context.** A workflow rule that is triggered when a record is created, updated, or deleted, is restricted to work in the context of a single record—that is, such a workflow rule can access and update fields on only one record.

NOTE: When a workflow rule is triggered by a record association or dissociation action, the integration event created by the workflow can contain fields from both the child record and the parent record.

Workflow Rules Order

When you create a workflow rule, Oracle CRM On Demand automatically assigns it the next unused order number for rules based on the same record type and the same trigger event. The order number determines the order in which Oracle CRM On Demand invokes the rules that are based on the same record type and the same trigger event. You can later change the order of your rules. For more information about changing the order of workflow rules, see [Changing the Order of Workflow Rules](#) (on page 1243).

Association and Dissociation Trigger Events

Association and dissociation trigger events on workflow rules are supported only for associations between accounts and contacts, and between opportunities and contacts. The actions that are available for association and dissociation trigger events are as follows:

- Send Email
- Create Integration Event
- Wait

The following table describes the actions that can trigger an association or dissociation workflow rule. It also shows the integration events that are generated by the workflow rule in each case (if an integration event action is configured on the workflow rule).

NOTE: Depending on the data in the records, additional integration events can be generated. For example, if a new contact created on an account is the primary contact for the account, an additional (account update) integration event is generated.

Action	Parent Record	Child Record	Channel	Integration Event
Create a new contact on an account.	Account	Contact	User Interface	Account: Update Contact : Insert Contact: Associate
			Web Services	Contact: Insert Contact: Associate Account: Update
Link an existing contact to an account.	Account	Contact	User Interface	Account Contact: Insert Contact: Update
			Web Services	Contact: Associate Account: Update
Remove a contact from an account.	Account	Contact	User Interface	Account Contact: Delete Contact: Update (primary contact only)
			Web Services	Contact: Dissociate Account: Update
Link an existing account to a contact.	Contact	Account	User Interface	Account Contact: Insert Account: Update
			Web Services	Account Contact: Insert Contact: Update
Remove an account from a	Contact	Account	User Interface	Account Contact: Delete

Action	Parent Record	Child Record	Channel	Integration Event
contact.				Contact: Update (primary contact only)
			Web Services	Account Contact: Delete Contact: Update (primary contact only)
Create a new opportunity on a contact.	Contact	Opportunity	User Interface	Opportunity: Insert Opportunity: Associate
			Web Services	Opportunity: Insert Opportunity: Associate Contact: Update
Remove an opportunity from a contact.	Contact	Opportunity	User Interface	Opportunity: Dissociate
			Web Services	Opportunity: Dissociate
Create a new contact on an opportunity. NOTE: This action is not available through the user interface.	Opportunity	Contact	Web Services	Contact: Insert Contact: Associate
Link an existing contact to an opportunity.	Opportunity	Contact	User Interface	Opportunity: Update Opportunity Contact Role: Insert
			Web Services	Contact: Associate Opportunity: Update
Remove a contact from an opportunity.	Opportunity	Contact	User Interface	Opportunity Contact Role: Delete Opportunity: Update
			Web Services	Contact: Dissociate Opportunity: Update

Workflow Rule Action Failures

If a workflow rule action fails to complete, the following happens:

- If an Update Value action fails, the operation that triggered the rule is blocked and none of the other actions on the workflow rule are performed. An error message displays to tell the user that the operation has failed.
- If any other type of workflow rule action fails, the user gets an error message but the operation that triggered the rule is not blocked, and other actions on the rule are performed.

Record Visibility and Workflow Actions

When a user performs an action that triggers a workflow rule, some of the actions on the workflow rule can fail if the user's action resulted in the user losing visibility to the record.

For example, you might have a workflow rule that is triggered when a modified account record is saved. If a user who owns an account record reassigns the account to another user, the workflow rule is triggered when the account record is saved. If the original owner of the record no longer has visibility to the account record through any other means, such as team or book membership, then any workflow action that requires access to the account record fails.

Latency

Workflow rules are evaluated in sequence and synchronously. Therefore, until all the rules are evaluated, the overall update operation is not completed. Workflow rules add a certain amount of latency to operations (that is, the time between the start of an operation and its completion). For example, each task created by a workflow rule can add as much as 20% latency to a record update operation. Each email created by a workflow rule adds about 5% latency.

Expressions take less time to evaluate. To minimize latency, add mutually exclusive expressions to your workflow conditions. Build your workflow rules incrementally, keeping performance in mind.

Click a topic to see step-by-step procedures to do the following:

- [Creating Workflow Rules](#) (on page 1221)
- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Changing the Order of Workflow Rules](#) (on page 1243)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

About Workflow Actions

You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

You can create the following types of workflow actions:

- **Assign a Book.** The Assign a Book action assigns a book to a record when the conditions on the workflow rule are met.
- **Create Integration Event.** The Create Integration Event action sends an integration event to one or more integration queues when the conditions on the workflow rule are met and a change is detected in at least one of the fields that are tracked by the Create Integration Event action.
- **Create Task.** The Create Task action creates a task when the conditions on the workflow rule are met.
- **Send Email.** The Send Email action sends email when the conditions on the workflow rule are met.
- **Update Field After Wait.** The Update Field After Wait action updates a field on the record that triggered the workflow rule. The action is performed at the end of the wait period defined in one or more Wait actions that precede the Update Field After Wait action on the workflow rule.
- **Update Values.** The Update Values action updates fields when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what data was changed).
- **Wait.** The Wait action causes Oracle CRM On Demand to delay the execution of other (following) actions on a workflow rule until a period has passed, or a certain date and time have been reached.

Three additional workflow actions are available only in Oracle CRM On Demand for Partner Relationship Management:

- Partner Book Sync
- Book Partner Sync
- Owner Partner Account Sync

For more information on these actions and how you can use them, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*, available from the [Oracle CRM On Demand documentation library](http://www.oracle.com/technology/documentation/siebelcrmod.html) (see Oracle CRM On Demand documentation library - <http://www.oracle.com/technology/documentation/siebelcrmod.html>) on Oracle Technology Network.

NOTE: If you specify more than one action for a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. After you have created the actions for the workflow rule, you can change the order of the actions. For more information, see [Changing the Order of Workflow Rule Actions](#) (on page 1242).

When creating actions for workflow rules, you use Expression Builder to select fields from records and to define expressions to calculate variables. You can merge the record fields and variables in the subject and message body text of an email, the subject and description text of a task, or the new value for a field that you want to update. You can also use Expression Builder to calculate the duration or the end date and time of a wait period in Wait actions on workflow rules. Field names and variables in the expressions you define are replaced by values when the workflow rules are implemented. For more information about Expression Builder, see [Expression Builder](#) (on page 1486).

For step-by-step procedures for creating workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)

- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

About Time-Based Workflow Rules

You can configure workflow rules so that actions are performed when a time limit has expired. For example, you can configure a rule so that an action on the rule is performed when the due date of a record has passed, or if a record has not been worked on for some time.

To configure a time-based workflow rule, you add one or more Wait actions to the rule. In each case where you want a time-based action to be performed, you create a Wait action that specifies the period of time for the delay, or the end-date and time of the delay. You can specify periods of time or dates directly, or you can create an expression to calculate the period or date. You then order the actions on the rule so that the Wait action comes immediately before the action that you want to delay. If more than one rule is required to fulfill a business process, you order the rules appropriately to achieve your objective.

About Reevaluating Workflow Conditions After Wait Actions

Using Wait actions, you can specify if the workflow rule condition is to be reevaluated when the waiting period ends. If the Reevaluate Rule Conditions After Wait check box on the Wait action is selected, then when the wait period ends the record is reread and reevaluated against the condition on the workflow rule.

If the rule condition is not met (because the record has been changed during the wait period), the remaining actions on the rule are not performed. By default, the Reevaluate Rule Conditions After Wait check box is selected on Wait actions.

If you clear the Reevaluate Rule Conditions After Wait check box on a Wait action, then when the wait period ends the record is reread and the next action on the rule is performed without checking that the record still meets the rule condition. If you have more than one Wait action on a rule, the Reevaluate Rule Conditions After Wait check box must be selected on each Wait action where you want the rule condition to be reevaluated when the wait period ends.

Example of Using Time-Based Workflow Rules

The following is an example of how time-based workflow rules might be used. You might use time-based workflow rules differently, depending on your business model.

Three priority options are used for service requests: Standard, Urgent, and Critical. The priority of a service request is set to Standard by default when the service request is created. A business process for service escalation requires the following actions:

- 1 After a new service request is created, and if the status of the service request is not updated within 24 hours, the priority of the service request is changed to Urgent and an email is sent to the owner of the service request to notify the owner that the service request must be updated.
- 2 If another 24 hours pass without a change to the status of the service request, the following happens:
 - The Priority field on the service request is changed to Critical
 - The service request is reassigned to the original owner's manager
 - An email is sent to the original owner of the service request and to the new owner to tell them that the service request has been reassigned to the owner's manager and the Priority has been changed to Critical

To meet this requirement, the company administrator sets up a workflow rule for the service request record type, which is configured as follows:

- 1 The rule trigger is set to the following value: When New Record Saved.
- 2 The rule condition specifies that the status of the service request is not set to Pending, as follows:
[<Status>] <>LookupValue("SR_STATUS", "Pending")
- 3 The following sequence of actions is on the workflow rule:
 - a A Wait action with a duration of 24 hours, with the Reevaluate Rule Conditions After Wait check box selected
 - b An Update Field After Wait action to change the Priority field on the service request to Urgent
 - c A Send Email action to send email to the owner of the service request to notify the owner that the priority of the service request has changed to Urgent and the service request must be updated
 - d A Wait action with a duration of 24 hours, with the Reevaluate Rule Conditions After Wait check box selected
 - e An Update Field After Wait action to change the Priority field on the service request to Critical
 - f An Update Field After Wait action to assign the original owner's manager as the new owner
 - g A Send Email action to send email to the owner of the service request and to the owner's manager to notify them that the service request has been reassigned and the priority of the service request has changed to Critical

For step-by-step instructions for creating Wait actions and Update Field After Wait actions on workflow rules, see [Creating Workflow Actions: Wait](#) (on page 1240) and [Creating Workflow Actions: Update Field After Wait](#) (on page 1236).

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

Creating Workflow Rules

Before you begin. Workflow functionality in Oracle CRM On Demand must be set up for your company, as described in [About Workflow Rules](#) (on page 1212). To perform the procedures described in this topic, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 1173).

NOTE: After a rule is created, you cannot change the record type or trigger event on the rule. However, you can update the workflow condition.

To create a workflow rule

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, do one of the following:
 - To create a new workflow rule by copying an existing one, click Copy on the workflow rule that you want to copy.
 - To create a new workflow rule that is not based on an existing rule, click New on the title bar.
- 4 In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the rule information. The following table describes the rule fields.

Field	Description
Workflow Name	Enter a unique name, up to 50 characters.
Active	Use the Active check box to enable and disable the rule. Any number of workflow rules can be active at the same time.
Record Type	Select the record type for the workflow rule. For create, update, and delete trigger events, each workflow rule relates to one record type only. The rule is evaluated for that

Field	Description
	<p>type of record and the actions are performed on that type of record. After a rule is created, you cannot change the record type on the rule.</p> <p>For workflow rules where the trigger event is After Association With Parent trigger event or After Dissociation From Parent, select the record type of the child record. For example, if you want the workflow rule to be triggered when a contact record is associated with an account record, select Contact in this field, and select Account in the Parent Record Type field.</p>
Trigger Event	<p>Select the event that triggers the rule.</p> <p>When this event occurs on a record of the specified type, the rule is evaluated. After a rule is created, you cannot change the trigger event on the rule.</p> <p>NOTE: The trigger events After Association With Parent and After Dissociation From Parent are supported only for the Account, Contact, and Opportunity record types. For more information, see the Association and Dissociation Trigger Events section of the About Workflow Rules (on page 1212) topic.</p>
Order	<p>This field is read-only when you create the workflow rule. It determines the order in which Oracle CRM On Demand invokes rules that are based on the same record type and the same trigger event. Oracle CRM On Demand automatically assigns the next unused number for rules based on the same record type and the same trigger event, but you can later change the order of the workflow rules. For more information, see Changing the Order of Workflow Rules (on page 1243).</p>
Parent Record Type	<p>This field is displayed if you select the After Association With Parent trigger event or the After Dissociation From Parent trigger event.</p> <p>Select the parent record type. For example, if you are setting up a workflow rule that will be triggered when a contact record is associated with a parent account record, select Account in this field, and select Contact in the Record Type field.</p>

- 5** If you want to define a condition on the workflow rule, click the *fx* icon in the Workflow Rule Condition section of the page, and use Expression Builder to define the workflow rule condition. For more information about Expression Builder, see [Expression Builder](#) (on page 1486).

NOTE: If you do not define any condition for the workflow rule, the actions on the rule will be performed each time the rule is triggered.

When creating conditions on workflow rules, note the following points:

- A workflow rule condition can contain a maximum of 1024 characters.
- You can configure workflow rules that are specific to particular roles or channels. For more information about restricting workflow rules to specific roles or channels, see [Restricting Workflow Rules to Specific Channels or Roles](#) (on page 1225).

- You can determine if a field in a record has been updated by using a condition similar to the following in the workflow rule. In this example, the string used to determine if the field has changed is *Invalid*, but you can use any string you want, provided that the string does not exist as a value in the field that is being examined:

```
IsNull([<FieldName>], "Invalid") <> IsNull(PRE("<FieldName>"), "Invalid")
```

CAUTION: The PRE function does not return the previous value of a field if the function is used in any workflow or action that is invoked after a Wait action. For more information about the PRE() function, see PRE (on page 1532).

- 6 (Conditional) If the trigger event on the rule is Before Modified Record Saved and the record type on the rule is Opportunity, do the following:
 - a In the Actions If Condition Is False section of the Workflow Rule Detail page, specify whether the save operation is to be canceled if the rule condition is not met.
 - b (Optional) Specify the error message that is to be displayed when the save operation is canceled because the rule condition is not met.

NOTE: The option to cancel the save operation is available only on workflow rules where the trigger event is Before Modified Record Saved and the record type is Opportunity.

The following table describes the options in the Actions If Condition Is False section of the Workflow Rule Detail page.

Field	Description
Cancel Save	<p>If you select this check box, the following actions are performed if the rule condition is not met:</p> <ul style="list-style-type: none"> ■ The workflow rule terminates. ■ All subsequent workflow rules based on the same record type that have the Before Modified Record Saved trigger event also terminate. ■ All previous changes to the state of the record, except changes made by Oracle CRM On Demand, are rolled back. ■ The record returns to its original state. However, if Oracle CRM On Demand makes an update to the record, the change overrides the Cancel Save action. For example, if the primary contact is removed from the related contacts, Oracle CRM On Demand updates the primary contact information on the parent opportunity record. This update by Oracle CRM On Demand overrides any Cancel Save action on the opportunity record. ■ Any subsequent workflow rules for the same record type that have the When Modified Record Saved trigger event are not triggered. ■ A message is returned as follows: <ul style="list-style-type: none"> ■ If the rule is triggered by a user action, a message is displayed to the user whose action triggered the rule.

Field	Description
	<ul style="list-style-type: none"> ■ If the rule is invoked by a Web service, a message is returned to the Web service as an error string. ■ If the rule is invoked by an import operation, a message is returned as an error string to the import log file. <p>You can specify the message in the Display Message field.</p> <p>If this check box is not selected, the save operation is not affected (and no message is returned) if the condition on the rule is not met.</p> <p>By default, the Cancel Save check box is not selected.</p>
Display Message	<p>In this field, you can specify the message that is returned to the user, Web service, or import log file if the condition on the rule is not met and the Cancel Save check box is selected on the rule.</p> <p>If you do not specify a message in this field, a default message is returned.</p> <p>The maximum number of characters that the message can contain is 1999.</p>

1 Save the workflow rule.

When you have saved the rule, you can create actions for the rule. You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule. For step-by-step procedures for creating workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Changing the Order of Workflow Rules](#) (on page 1243)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)

- [Deleting Workflow Rules and Actions](#) (on page 1246)

Restricting Workflow Rules to Specific Channels or Roles

You can restrict a workflow rule to specific channels or roles by adding a condition to the workflow rule.

To prevent a channel from invoking a workflow rule

- Use the `ExcludeChannel()` function in the condition expression.

For example, to prevent a large import operation from triggering a workflow rule, use the following condition in the workflow rule:

```
ExcludeChannel ("Import")
```

For more information about the `ExcludeChannel()` function, see [ExcludeChannel](#) (on page 1503).

To restrict a workflow rule to a specific role

- Use the `UserValue()` function with the `<Role>` attribute in the condition expression.

For example, to restrict a workflow rule so that it is invoked only when the role of the user whose action triggers the rule is Administrator and the Priority on the record is set to High, use the following condition in the workflow rule:

```
UserValue('<Role>')="Administrator" AND [<Priority>]="High"
```

For more information about the `UserValue()` function, see [UserValue](#) (on page 1541).

Creating Workflow Actions: Assign a Book

An Assign a Book action on a workflow rule automatically assigns a book to a record when the conditions on the workflow rule are met.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Assign a Book action.

Before you begin. To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 1173).

To create an Assign a Book action

- 1 Navigate to the rule where you want to create the action:
 - a In the upper-right corner of any page, click the Admin global link.
 - b In the Business Process Management section, click Workflow Configuration.
 - c On the Workflow Rules List page, find the rule where you want to create the action.

For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).

- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Assign a Book.
NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.
TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
- 4 In the Workflow Action Edit page, enter a name for the action.
- 5 If you want to enable the action, select the Active check box.
- 6 Click the selector button beside the Book Name field.
- 7 In the Book lookup, select the book to which you want to assign records, and click OK.
- 8 Select the appropriate Assignment Option and Apply To option.
For a description of the options, see [Assigning Records to Books](#) (on page 1200).
- 9 Save the action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

Creating Workflow Actions: Create Integration Event

A Create Integration Event action on a workflow rule automatically sends an integration event to one or more integration queues when the conditions on the workflow rule are met and a change is detected in at least one of the fields that are tracked by the Create Integration Event action.

About Create Integration Event Actions and Wait Actions

If you want to use a Create Integration Event action to create an integration event that captures the changes made to a record by the event that triggers a workflow rule, then you must place the Create Integration Event action before any Wait action in the sequence of actions on the workflow rule. If a Wait action precedes a Create Integration Event action on a workflow rule, then the Wait action prevents the Create Integration Event action from detecting changes to the record. When the waiting period on the Wait action ends, the record is read again before the remaining actions on the rule are performed, and the values of the fields on the record before the event that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of a field are considered to be the same, and the Create Integration Event action does not create an integration event because it does not detect any change in the tracked fields.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Create Integration Event action.

Before you begin. To perform the procedure described here, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 1173).

To create a Create Integration Event action

- 1 Navigate to the rule where you want to create the action:
 - a In the upper-right corner of any page, click the Admin global link.
 - b In the Business Process Management section, click Workflow Configuration.
 - c On the Workflow Rules List page, find the rule where you want to create the action.
For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).
- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Create Integration Event.

NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
- 4 In the Workflow Action Edit page, enter a name for the action.
- 5 If you want to enable the action, select the Active check box.
- 6 Select the integration queues to which the integration events will be written.

7 Save the workflow action.

If the trigger for the action is Before Record Is Deleted, no further configuration is required, and you can skip the remaining steps in this procedure. Otherwise, continue with the remaining steps.

8 Click Configure beside the action name on the Workflow Rule Detail page.

9 In the Field Tracking page, select the Track Changes check box for each field that you want to track.

NOTE: In addition to the fields that are selected on the Field Tracking page for the workflow action, any fields that are marked as required fields in the field setup for the record type (in the Application Customization pages) are also tracked in the integration events that are generated for the record type by the workflow action. For more information about required fields and how they are set up, see [About Field Management](#) (on page 1033) and [Creating and Editing Fields](#) (on page 1043).

For more information about integration events, see [About Integration Events](#) (on page 1464).

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)

Related Topics

See the following topics for related information about workflows:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)
- [About Integration Events](#) (on page 1464)

Creating Workflow Actions: Create Task

A Create Task action on a workflow rule creates a task automatically when the conditions on the workflow rule are met.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

About Configuring Workflow Rules to Create Follow-Up Tasks for Activities

The Create Task action is available for the Activity record type so that you can configure workflow rules to create follow-up tasks when new activity records are saved or existing activity records are updated, deleted, or restored. Follow-up tasks that are created for activity records do not trigger any subsequent workflow rules that are based on the Activity record type. For more information, see [Example of Configuring Workflow Rules to Create Follow-Up Tasks for Activities](#) (on page 1232).

The following procedure describes how to create a Create Task action.

Before you begin. To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 1173).

To create a Create Task action

- 1 Navigate to the rule where you want to create the action:
 - a In the upper-right corner of any page, click the Admin global link.
 - b In the Business Process Management section, click Workflow Configuration.
 - c On the Workflow Rules List page, find the rule where you want to create the action.
For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).
- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Create Task.
NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.
TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
- 4 In the Workflow Action Edit page, enter a name for the action.
- 5 If you want to enable the action, select the Active check box.
- 6 Fill in the fields described in the following table, and then save the action.
NOTE: If you select the Relative User on Record option in the Owner field for the task, and the owner of the record is an inactive user, the task will not be created.

Field	Description
-------	-------------

Field	Description
Owner	<p>Select the type of owner for the task (Relative User on Record or Specific User), and then select the owner:</p> <ul style="list-style-type: none"> ■ If you select Relative User on Record, select the user from the list. <p>If you select a team role as the owner, the workflow rule creates a task for each user who has the assigned team role.</p> <p>NOTE: For accounts, contacts, and opportunities, any custom team roles that are added to the record type are available for selection in the list of Relative User on Record owners. For more information on customizing records, see Record Type Application Customization Page (on page 1031).</p> <ul style="list-style-type: none"> ■ If you select Specific User, click the Lookup icon, and select the task owner.
Type	Select the activity type from the drop-down list.
Due Date	<p>Enter an expression that evaluates to the due date for the task. You can use Expression Builder to create the expression. Click the fx icon beside the field to open the Expression Builder window. The expression can contain a maximum of 1024 characters.</p> <p>NOTE: For the workflow action to work correctly, the Due Date field must contain an expression that evaluates to a valid date. Do not enter anything else, such as a date or an integer, in the Due Date field.</p> <p>If the expression that you enter evaluates to a date that is before or the same as the current date, then the due date is the current date by default.</p> <p>The due date can be set to a maximum of 2400 days in the future. If the expression evaluates to more than 2400 days in the future, then the due date is set to 2400 days in the future. For example, if the expression contains Today()+3000, then the result is calculated as Today()+2400.</p> <p>If the expression evaluates to an invalid date or to any other data type, such as string, integer, or Boolean, then an error occurs, and the activity is not created.</p> <p>You can use the Check Syntax button in Expression Builder to test the syntax of the expression. However, Expression Builder does not verify that the expression evaluates to a valid date.</p> <p>For information about using Oracle On Demand Expression Builder, see Expression Builder (on page 1486).</p>

Field	Description
Priority	Select the activity priority from the drop-down list.
Status	Select the activity status from the drop-down list.
Task Currency	Select a currency.
Private	Select this check box if you want the task to be visible only to the task owner.
Subject	<p>Enter the subject line for the task.</p> <p>You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.</p> <p>For example, the text might include the following:</p> <pre>Call %%%[<ContactLastName>]%%%</pre> <p>If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added. If you use Expression Builder to embed a complex expression, the percent signs might not be added at the appropriate places. In that case, ensure that the percent signs are placed before and after the entire expression so that the expression is evaluated correctly.</p> <p>For example, %%%Today() + 30%%% adds 30 days to the current date, but %%%Today() %%%+ 30 concatenates 30 to the string representation of the current date.</p> <p>To use Expression Builder to embed functions and field names in the field, click the <i>fx</i> icon beside the field.</p> <p>If you are entering only static text, you do not need to use Expression Builder.</p> <p>This field can contain a maximum of 1024 characters, including the percent signs before and after the expressions.</p>
Description	<p>Enter the description of the task.</p> <p>You can embed functions and field names in the text, as described for the Subject field.</p> <p>This field can contain a maximum of 1024 characters, including the percent signs before and after the expressions.</p>

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)

- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

Example of Configuring Workflow Rules to Create Follow-Up Tasks for Activities

This topic provides an example of configuring workflow rules to create follow-up tasks when activity records are created. You might use this functionality differently, depending on your business model.

You want a follow-up task to be created automatically each time a user creates a new activity. The follow-up task is to be set up as follows:

- The task is a call.
- The due date for the follow-up task is two days after the original task is created.
- The priority of the follow-up task is set to 1-High.
- The owner of the follow-up task is the same as the owner of the original activity.

To configure a workflow rule to create a follow-up task for a new activity

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 In the Workflow Rules List page, click New on the title bar.
- 4 In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the rule information, as follows:
 - a In the Workflow Name field, enter a name for the workflow rule.
 - b Select the Active check box.

- c** In the Record Type field, select Activity.
 - d** In the Trigger Event field, select When New Record Saved.
- 5** Save the workflow rule.
- 6** In the Workflow Rule Details page, in the Actions title bar, click Menu, and then select Create Task.
- 7** In the Workflow Action Edit page, fill in the action information, as follows:
 - a** In the Action Name field, enter a name for the action.
 - b** Select the Active check box.
 - c** In the Owner field, select Relative User on Record, then select Activity Owner.
 - d** In the Type field, select Call.
 - e** In the Due Date field, click the fx icon, enter the following expression in the Expression field in the Expression Builder window, and then save the expression:
Today()+2
 - f** In the Priority field, select 1-High.
 - g** In the Subject field, enter the subject line for the task, for example, *Follow-Up Call for New Activity*.
- 8** Save the workflow action.

Creating Workflow Actions: Send Email

A Send Email action on a workflow rule automatically sends email when the conditions on the workflow rule are met.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Send Email action.

Before you begin. To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 1173).

To create a Send Email action

- 1** Navigate to the rule where you want to create the action:
 - a** In the upper-right corner of any page, click the Admin global link.
 - b** In the Business Process Management section, click Workflow Configuration.
 - c** On the Workflow Rules List page, find the rule where you want to create the action.

For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).

2 Click the Workflow Name link on the rule.

3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Send Email.

NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

4 In the Workflow Action Edit page, enter a name for the action.

5 If you want to enable the action, select the Active check box.

6 In the From field, select or enter the email address for the sender of the email, as follows:

- Select the Default Email Address option to use the default address.
- Select the Current User option to use the email address of the signed-in user who triggers the workflow.
- Select the Specific Email Address option, and then specify the address.

When entering the address, the following restrictions apply:

- You can enter the email address directly, or click the *fx* icon beside the field, and use Expression Builder to define the email address.
- Specify only one email address. Multiple addresses are not supported in the From field.
- If you specify an absolute email address, you must enclose the address in single or double quotation marks.
- Expression Builder checks only the syntax of the address expressions. It does not check that the address is valid.
- This field can contain a maximum of 1024 characters.

7 In the To field, select or enter the email address of the email recipient, as follows:

- Select Specific User or Relative User on Record, and then select the recipient, as follows:
 - If you select Specific User, click the Lookup icon, and select the user.
 - If you select Relative User on Record, select the recipient from the list.

If you select a team role as the recipient, the workflow rule sends the mail to each user who has the assigned team role.

NOTE: For accounts, contacts, and opportunities, any custom roles that are added to the record type are available in the list of Relative User on Record recipients. For more information on customizing records, see [Record Type Application Customization Page](#) (on page 1031).

- Select the Specific Email Address option, and then specify the addresses.

When entering the addresses, the following restrictions apply:

- You can enter email addresses directly, or click the *fx* icon beside the field, and use Expression Builder to define email addresses.

- To enter multiple addresses, use a semi-colon (;) delimiter.
- You must enclose absolute email addresses in single or double quotation marks.
- Expression Builder checks only the syntax of the address expressions. It does not check that the addresses are valid.
- This field can contain a maximum of 1024 characters.

The following example shows an entry with multiple addresses:

```
PRE('<EmailField1>') + ";" + [<EmailField1>] + ";" + "john.doe@company.com"
```

8 Enter the subject line for the email.

You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a text value.

For example, the text might include the following:

```
A new %%%[<AccountType>]%%% account has been created
```

If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added. If you use Expression Builder to embed a complex expression, the percent signs might not be added at the appropriate places. In that case, ensure that the percent signs are placed before and after the entire expression so that the expression is evaluated correctly.

For example, %%%Today() + 30%%% adds 30 days to the current date, but %%%Today() %%%+ 30 concatenates 30 to the string representation of the current date.

To use Expression Builder to embed functions and field names in the field, click the *fx* icon beside the field. If you are entering only static text, you do not need to use Expression Builder.

This field can contain a maximum of 1024 characters, including the percent signs before and after the functions and field names.

9 Enter the message for the email.

You can embed functions and field names in the text, as described in Step 3.

For example, the text might include the following:

```
Hello Mr %%%[<ContactLastName>]%%%,
```

This field can contain a maximum of 2000 characters, including the percent signs before and after the expressions.

10 Save the action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)

- [Creating Workflow Actions: Wait](#) (on page 1240)

Related Topics

See the following topics for related information about workflows:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

Creating Workflow Actions: Update Field After Wait

An Update Field After Wait action on a workflow rule updates a field on the record that triggered the workflow rule. The action is performed at the end of the wait period defined in one or more Wait actions that precede the Update Field After Wait action on the workflow rule.

There must be at least one active Wait action that precedes the Update Field After Wait action on the workflow rule. Oracle CRM On Demand does not allow you to activate an Update Field After Wait action unless the action is preceded by an active Wait action.

You can create more than one Update Field After Wait action on a workflow rule, provided that at least one active Wait action precedes the first Update Field After Wait action on the rule.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Update Field After Wait action.

Before you begin. To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 1173).

To create an Update Field After Wait action

- 1 Navigate to the rule where you want to create the action:
 - a In the upper-right corner of any page, click the Admin global link.
 - b In the Business Process Management section, click Workflow Configuration.
 - c On the Workflow Rules List page, find the rule where you want to create the action.

For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).

- 2 Click the Workflow Name link on the rule.
- 3 Make sure that at least one active Wait action is present in the list of actions.

- 4 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Update Field After Wait.

NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

- 5 In the Workflow Action Edit page, enter a name for the action.
- 6 If you want to enable the action, select the Active check box.
- 7 Fill in the fields described in the following table, and then save the action.

Field	Description
Field Name	Select the name of the field that is to be updated.
Value	<p>Click the <i>fx</i> icon beside the field, and define the expression that calculates the new value for the field. You can use the Check Syntax button in Expression Builder to test the syntax.</p> <p>This field can contain a maximum of 1024 characters.</p> <p>If you define an expression to calculate a field, such as a custom Margin field, where Margin equals Revenue minus Cost, then the field value is calculated each time the workflow rule is triggered, even if the Revenue or the Cost has not changed. For better performance, you can define an additional condition on the workflow rule, such as:</p> <pre>FieldValue('<Revenue>') <> PRE('<Revenue>') OR FieldValue('<Cost>') <> PRE('<Cost>')</pre> <p>The PRE function returns the value that was in the field before the field was updated.</p>
Overwrite Existing Values	<p>Select this check box if the existing value in the field is to be overwritten with the new value.</p> <p>If the field already contains a value, the value is not updated unless this check box is selected.</p> <p>If the field is empty, the field is updated with the new value, even if this check box is not selected.</p>

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

Creating Workflow Actions: Update Values

An Update Values action on a workflow rule automatically updates fields when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what data was changed).

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Update Values action.

Before you begin. To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 1173).

To create an Update Values action

- 1 Navigate to the rule where you want to create the action:
 - a In the upper-right corner of any page, click the Admin global link.
 - b In the Business Process Management section, click Workflow Configuration.
 - c On the Workflow Rules List page, find the rule where you want to create the action.
For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).
- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Update Values.

NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
- 4 In the Workflow Action Edit page, enter a name for the action.
- 5 If you want to enable the action, select the Active check box.

- 6 Fill in the fields described in the following table, and then save the action.

Field	Description
Field Name	Select the name of the field that is to be updated from the drop-down list.
Value	<p>Click the <i>fx</i> icon beside the field, and define the expression that calculates the new value for the field. You can use the Check Syntax button in Expression Builder to test the syntax.</p> <p>This field can contain a maximum of 1024 characters.</p> <p>If you define an expression to calculate a field, such as a custom Margin field, where Margin equals Revenue minus Cost, then the field value is calculated each time the workflow rule is triggered, even if the Revenue or the Cost has not changed. For better performance, you can define an additional condition on the workflow rule, such as:</p> <pre>FieldValue('<Revenue>') <> PRE('<Revenue>') OR FieldValue('<Cost>') <> PRE('<Cost>')</pre> <p>The PRE function returns the value that was in the field before the field was updated.</p>
Overwrite Existing Values	<p>Select this check box if the existing value in the field is to be overwritten with the new value.</p> <p>If the field already contains a value, the value is not updated unless this check box is selected.</p> <p>If the field is empty, the field is updated with the new value, even if this check box is not selected.</p>

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Wait](#) (on page 1240)

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)

- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

Creating Workflow Actions: Wait

A Wait action on a workflow rule allows you to delay the execution of other (following) actions on a workflow rule until a period has passed, or a certain date and time have been reached.

About Wait Actions and Create Integration Event Actions

If you want to use a Create Integration Event action to create an integration event that captures the changes made to a record by the event that triggers a workflow rule, then you must place the Create Integration Event action before any Wait action in the sequence of actions on the workflow rule. If a Wait action precedes a Create Integration Event action on a workflow rule, then the Wait action prevents the Create Integration Event action from detecting changes to the record. When the waiting period on the Wait action ends, the record is read again before the remaining actions on the rule are performed, and the values of the fields on the record before the event that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of a field are considered to be the same, and the Create Integration Event action does not create an integration event because it does not detect any change in the tracked fields.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Wait action.

Before you begin. To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 1173).

To create a Wait action

- 1 Navigate to the rule where you want to create the action:
 - a In the upper-right corner of any page, click the Admin global link.
 - b In the Business Process Management section, click Workflow Configuration.
 - c On the Workflow Rules List page, find the rule where you want to create the action.

For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).

- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Wait.

NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

- 4 In the Workflow Action Edit page, enter a name for the action.

- 5 If you want to enable the action, select the Active check box.
- 6 If you do not want Oracle CRM On Demand to reevaluate the rule conditions after the wait period ends, clear the Reevaluate Rule Conditions After Wait check box.

NOTE: For more information about the Reevaluate Rule Conditions After Wait check box, see [About Time-Based Workflow Rules](#) (on page 1219).

- 7 Specify the duration of the wait, using one of the following options:
 - Select the Period option, and then enter the period for the delay in years, months, days, hours, and minutes, as follows:
 - In the Years field, enter a positive integer value between 0 (zero) and 5.
 - In the Months field, enter a positive integer value between 0 (zero) and 12.
 - In the Days field, enter a positive integer value between 0 (zero) and 200.
 - In the Hours field, enter a positive integer value between 0 (zero) and 200.
 - In the Minutes field, enter a positive integer value between 0 (zero) and 59.

You cannot specify a negative value or a noninteger value such as 1.5.

- Select the Period Expression option, then click the *fx* icon beside the field, and use Expression Builder to create an expression to calculate the period for the delay.

You can use the Duration function in Expression Builder to calculate a period in days or fractions of days. For more information, see [Duration](#) (on page 1501).

The expression must evaluate to a number. The following are examples of valid expressions to calculate the period for a delay:

```
Duration('P0YT1H') + Duration('P0YT1M') + Duration('P1Y')
```

```
Duration('P0YT1H') + 1
```

```
Duration('P1YT1H') - 1
```

The maximum supported duration is 'P5Y12M200DT200H59M'; that is, 5 years, 12 months, 200 days, 200 hours, and 59 minutes.

NOTE: If the calculated wait period is negative, the wait period is set to zero, and the Wait action completes immediately. Any remaining actions on the workflow rule are executed without delay.

- Select the Time option, click the calendar icon, and select the end date and time for the delay.
Select the time according to the time zone specified in your personal settings.
- Select the Time Expression option, then click the *fx* icon beside the field, and use Expression Builder to create an expression to calculate the end date and time for the delay.

You can use the Duration function in Expression Builder to calculate a period in days or fractions of days. For more information, see [Duration](#) (on page 1501).

The expression must evaluate to a date and time. The following are examples of valid expressions to calculate the end date and time for a delay:

```
Timestamp() + Duration('P0YT5M')
```

`Today() + Duration('P0YT1H5M')`

NOTE: If the calculated end date and time has already passed, the wait period on the action is set to 0 (zero) and the Wait action completes immediately. Any remaining actions on the workflow rule are executed without delay.

If the expression does not evaluate to a valid date and time, the Wait action completes immediately, and any remaining actions on the workflow rule are executed without delay.

If the expression evaluates to a date and time that is more than 5 years, 12 months, 200 days, 200 hours, and 59 minutes (that is, the maximum supported wait duration) after the trigger date and time, the end date and time are calculated as the trigger date and time plus the maximum supported wait duration.

8 Save the action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)

Related Topics

See the following topics for related information about workflows:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

Changing the Order of Workflow Rule Actions

If there is more than one action on a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule.

To change the order of the actions on a workflow rule

- 1 In the upper-right corner of any page, click the Admin global link.

- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule where you want to change the order of the actions.
For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).
- 4 Click the Workflow Name link on the rule.
- 5 In the Actions title bar on the Workflow Rule Detail page, click the Edit Order button.
- 6 On the Edit Action Order page, use the directional arrows to change the order of the actions.
NOTE: If there is an Update Field After Wait action on the rule, it must be preceded by at least one active Wait action on the rule.
- 7 Click Save to save your changes.

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Creating Workflow Actions: Assign a Book](#) (on page 1225)
- [Creating Workflow Actions: Create Integration Event](#) (on page 1227)
- [Creating Workflow Actions: Create Task](#) (on page 1228)
- [Creating Workflow Actions: Send Email](#) (on page 1233)
- [Creating Workflow Actions: Update Field After Wait](#) (on page 1236)
- [Creating Workflow Actions: Update Values](#) (on page 1238)
- [Creating Workflow Actions: Wait](#) (on page 1240)

Changing the Order of Workflow Rules

When you create a workflow rule, the rule is automatically assigned the next unused order number for rules based on the same record type and the same trigger event. The order number determines the order in which Oracle CRM On Demand invokes workflow rules based on the same record type and the same trigger event. You can change the order of your rules.

For example, if you create a workflow rule based on the Account record type, with the trigger event, Before Record Is Deleted, and two workflow rules already have the same record type and trigger event, your new rule is assigned order number 3. You can later change the order number, so that your new rule is the first rule invoked for the specified record type and trigger event.

The following procedure describes how to change the order of a workflow rule.

To change the order of workflow rules

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule whose order you want to change, and click the name link on the rule.
For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 77).
- 4 On the Workflow Rule Detail page, click Edit Order.
- 5 In the Edit Workflow Order page, click the arrows to change the order of the rule.
- 6 Click Save to save your changes.

NOTE: If you delete a workflow rule, the other rules based on the same record type and the same trigger event are automatically reordered. However, if you make a workflow rule inactive, its order within the list of rules based on the same record type and the same trigger event does not change (but the rule is not invoked).

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)

Deactivating Workflow Rules and Actions

If you deactivate a workflow rule while an instance of a Wait action on the rule is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

If you deactivate a Wait action on a workflow rule while an instance of the Wait action is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

The following procedure describes how to deactivate a workflow rule.

To deactivate a workflow rule

- 1 In the upper-right corner of any page, click the Admin global link.

- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule that you want to deactivate.
For information about searching for workflow rules in the List page, see [Filtering Lists](#) (on page 77).
- 4 In the record-level menu for the rule, select Edit.
- 5 In the Workflow Rule Detail page, clear the Active check box.
- 6 Save your changes.

The following procedure describes how to deactivate a workflow rule action.

To deactivate a workflow rule action

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule from which you want to delete the action.
For information about searching for workflow rules in the List page, see [Filtering Lists](#) (on page 77).
- 4 Click the Workflow Name link for the rule.
- 5 In the Workflow Rule Detail page, in the Actions section, find the action that you want to delete.
- 6 In the record-level menu for the action, select Edit.
- 7 In the Workflow Action Edit page, clear the Active check box.
NOTE: If there is an Update Field After Wait action on the rule, it must be preceded by at least one active Wait action on the rule. If you attempt to deactivate a Wait action, and there is no other Wait action preceding the Update Field After Wait action, Oracle CRM On Demand does not allow you to deactivate the Wait action.
- 8 Save your changes.

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Changing the Order of Workflow Rules](#) (on page 1243)
- [Deleting Workflow Rules and Actions](#) (on page 1246)

Deleting Workflow Rules and Actions

When you delete a workflow rule, all actions on the rule are also deleted. Also, the order numbers on the remaining rules for the relevant record type are automatically updated as necessary to ensure that there is no gap in the sequence of the numbers.

If you delete a workflow rule while an instance of a Wait action on the rule is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

When you delete an action from a workflow rule, the order numbers on the remaining actions on the rule are automatically updated as necessary to ensure that there is no gap in the sequence of the numbers.

If you delete a Wait action from a workflow rule while an instance of the Wait action is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

The following procedure describes how to delete a workflow rule.

To delete a workflow rule

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule that you want to delete.
For information about searching for workflow rules in the List page, see [Filtering Lists](#) (on page 77).
- 4 In the record-level menu for the rule, select Delete.
- 5 Confirm that you want to delete the rule.

The following procedure describes how to delete a workflow rule action.

To delete a workflow rule action

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule from which you want to delete the action.
For information about searching for workflow rules in the List page, see [Filtering Lists](#) (on page 77).
- 4 Click the Workflow Name link for the rule.
- 5 In the Workflow Rule Details page, in the Actions section, find the action that you want to delete.

- 6 In the record-level menu for the action, select Delete.

NOTE: If there is an Update Field After Wait action on the rule, it must be preceded by at least one active Wait action on the rule. If you attempt to delete a Wait action, and there is no other Wait action that precedes the Update Field After Wait action, Oracle CRM On Demand does not allow you to delete the Wait action.

- 7 Confirm that you want to delete the rule.

Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 1212)
- [About Workflow Actions](#) (on page 1218)
- [About Time-Based Workflow Rules](#) (on page 1219)
- [Creating Workflow Rules](#) (on page 1221)
- [Changing the Order of Workflow Rule Actions](#) (on page 1242)
- [Changing the Order of Workflow Rules](#) (on page 1243)
- [Deactivating Workflow Rules and Actions](#) (on page 1244)

Workflow Monitor

You can use the Workflow Monitor to view instances of workflow Wait actions that are in a pending state, and instances of workflow actions that terminated unexpectedly after a wait period on a Wait action ended. The Workflow Monitor page shows two lists:

- A list of pending instances
- A list of error instances

Pending Instances

From the Workflow Monitor, you can view details of pending instances and details of the workflow actions. For example, if an instance of a workflow Wait action is pending for longer than you expect, you can use the Workflow Monitor to investigate the instance and look at the configuration of the workflow action, and if necessary, you can delete the instance.

NOTE: When you delete a pending instance of a Wait action, none of the remaining actions on the workflow rule are performed.

For example, you might configure a workflow rule with the following intended sequence of actions:

- 1 A Wait action with a duration of 24 hours
- 2 A Send Email action
- 3 A Wait action with a duration of 48 hours

4 A Send Email action

5 A Create Task action

If the actions are correctly configured, the first Wait action in the sequence, action 1, remains in the Pending state for 24 hours. When the wait period ends, the Send Email action (action 2) is performed. The second Wait action (action 3 on the workflow rule) is next in the sequence. It remains in the Pending state for 48 hours. When the wait period ends, the Send Email action (action 4) and the Create Task action (action 5) are performed.

However, if the wait period on action 3 was incorrectly specified as 48 days rather than 48 hours, the action remains in the pending state until 48 days have passed. You can see the action in the pending list on the Workflow Monitor, and you can view the action details to see if the wait period is incorrectly specified. You can then delete the Wait action instance.

When you delete the Wait action instance, the workflow rule instance is terminated, and the remaining actions on the rule instance are not performed. In the previous example:

- If you delete action 1 while it is pending, actions 2, 3, 4, and 5 are not performed.
- If you delete action 3 while it is pending, actions 4 and 5 are not performed.

NOTE: Wait actions are the only type of workflow actions that are held in the Pending state.

Error Instances

You can also use the Workflow Monitor to view details of some failed workflow instances. Failed instances of workflow actions are recorded on the Workflow Monitor only in the case where the action fails after the end of the wait period on a Wait action on the workflow rule. In all other cases, when a workflow instance fails, the failure is reported immediately to the user whose actions triggered the workflow rule (the failure is reported in an onscreen error message, or in the log file, if the workflow rule was triggered by a Web service or an import operation).

For example, you might configure a workflow rule with the following sequence of actions:

1 A Send Email action

2 A Create Task action

3 A Wait action

4 A Send Email action

If action 1 or action 2 terminates because of an error, the failure is reported in an error message on the screen or in the log file. If action 3 fails before the wait period starts, the failure is also reported in an error message on the screen or in the log file. If action 3 fails after the wait period ends, or if action 4 fails, the failure of the action is recorded in the Workflow Monitor. An error message is also written to the log file if the workflow rule was triggered by a Web service or an import operation, but no message is displayed on the screen in the case where the workflow rule was triggered by a user action.

Details of workflow action instances that fail after the end of the wait period on a Wait action are retained in the error instances list of the Workflow Monitor for three months or until you delete them, whichever comes first. You can view details of the instances that terminated and details of the workflow actions.

For information about using the Workflow Monitor, see the following topics:

- [Viewing Workflow Instances](#) (on page 1249)

- [Deleting Instances from the Workflow Monitor](#) (on page 1250)
- [Workflow Instance Fields](#) (on page 1252)

Related Topics

See the following topic for related information about workflow rules:

- [Workflow Configuration](#) (on page 1211)

Viewing Workflow Instances

You can use the Workflow Monitor to view instances of workflow Wait actions that are in a pending state, and if necessary, you can delete a pending action to terminate the workflow rule instance.

You can also view information about instances of workflow actions that terminated unexpectedly after the end of the wait period on a Wait action. For information about what is recorded and displayed on the Workflow Monitor, see [Workflow Monitor](#) (on page 1247) and [Workflow Instance Fields](#) (on page 1252).

Before you begin: To use the Workflow Monitor, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

The following procedure describes how to view workflow instances in the pending or error state.

To view workflow instances in the pending or error state

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Monitor.
- 3 On the Workflow Monitor page, if the instance you want to view is not displayed in the Pending Instances list or the Error Instances list, click Show All in the appropriate list.
- 4 In the Pending Instances List page or the Error Instances List page, filter the list to find the instance you want, as follows:
 - a Click a letter in the Alpha bar to show only workflow instances where the workflow name begins with that letter.
 - b Type characters in the text field, and click Go to find workflow instances where the workflow name begins with those characters.
 - c Click a column header to sort records based on the values in that column. An arrow next to the column header indicates which column the sort is based on, and whether it is sorted in ascending or descending order. By default, records are searched using the left-most column as the search key.
- 5 To view details of an instance, click the Instance ID link.
- 6 To view details of the workflow action of which the record is an instance, click the Workflow Action link.

Creating Lists of Pending Workflow Instances

You can create lists of pending workflow instances based on filters you define.

NOTE: You cannot create filtered lists of error instances (that is, instances that terminated unexpectedly due to an error).

The following procedure describes how to create lists of pending workflow instances that are based on filters you define.

To create a filtered list of pending workflow instances

- In the Pending Instances List page, click Menu in the title bar, and select Create New List.

For more information about creating and refining lists, see [Creating and Refining Lists](#) (on page 73).

The following procedure describes how to manage filtered lists of pending workflow instances.

To manage lists of pending workflow instances

- In the Pending Instances List page, click Menu in the title bar, and select Manage Lists Page.

For more information about managing lists, see [Manage Lists Page](#) (on page 79).

The following procedure describes how to view the filter for a list of pending workflow instances.

To view details of the filter on a list of pending workflow instances

- In the Pending Instances List page, click Menu in the title bar, and select Show List Filter.

For more information about list filters, see [View List Page](#) (on page 80).

For more information about using the Workflow Monitor, see the following:

- [Workflow Monitor](#) (on page 1247)
- [Deleting Instances from the Workflow Monitor](#) (on page 1250)
- [Workflow Instance Fields](#) (on page 1252)

Related Topics

See the following topic for related information about workflow rules:

- [Workflow Configuration](#) (on page 1211)

Deleting Instances from the Workflow Monitor

You can delete instances of workflow actions from the Workflow Monitor one at a time. You can also delete multiple pending instances at the same time, by creating a filtered list of the instances and using the batch delete facility. The batch delete facility is not available for error instances.

Workflow error instances are retained in the error instances list of the Workflow Monitor for three months or until you delete them, whichever comes first.

For information about what is recorded and displayed on the Workflow Monitor, see [Workflow Monitor](#) (on page 1247) and [Workflow Instance Fields](#) (on page 1252)

NOTE: When you delete a pending instance of a Wait action from the workflow monitor, the workflow rule instance is terminated, and none of the remaining actions on the workflow rule are performed.

Before you begin: To use the Workflow Monitor, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

The following procedure describes how to delete an instance from the Workflow Monitor.

To delete an instance from the Workflow Monitor

- 1** On the Workflow Monitor page, if the instance you want to view is not displayed in the Error Instances list or the Pending Instances list, click Show All in the appropriate list.
- 2** In the Error Instances List page or the Pending Instances List page, filter the list to find the instance you want, as follows:
 - a** Click a letter in the Alpha bar to show only workflow instances where the workflow name begins with that letter.
 - b** Type characters in the text field, and click Go to find workflow instances where the workflow name begins with those characters.
 - c** Click a column header to sort records based on the values in that column. An arrow next to the column header indicates which column the sort is based on, and whether it is sorted in ascending or descending order. By default, records are searched using the left-most column as the search key.
- 3** Click Delete for the instance you want to delete.

The following procedure describes how to delete a list of pending instances from the Workflow Monitor.

To delete a list of pending instances

- 1** If you have not already done so, create the list of pending instances that you want to delete.
For more information, see [Viewing Pending and Error Workflow Instances](#).
- 2** In the Pending Instances List page, click Menu and select Batch Delete.
- 3** Click OK to confirm that you want to proceed.
- 4** On the Batch Delete Queue page, click Proceed in the Active Requests section.

NOTE: If you do not click Proceed, the records are not deleted.

TIP: You can return to the Batch Delete Queue page at any time by clicking the Admin global link, and then clicking Batch Delete Queue on the Admin Homepage.
- 5** To review the log file for the delete operation, in the Batch Delete Queue page, click Log in the Processed Requests section.

For more information about using the Workflow Monitor, see:

- [Workflow Monitor](#) (on page 1247)
- [Viewing Workflow Instances](#) (on page 1249)
- [Workflow Instance Fields](#) (on page 1252)

Related Topics

See the following topic for related information about workflow rules:

- [Workflow Configuration](#) (on page 1211)

Workflow Instance Fields

The following table describes the fields that you can view for workflow instances in the pending or error state in the Workflow Monitor.

Field	Description
Instance ID	The ID that Oracle CRM On Demand generates for this workflow instance.
Workflow Name	The name of the workflow rule where the workflow action is configured.
Record Type	The record type for the workflow rule.
Trigger Event	The event that triggers the workflow rule.
Workflow Action	The name of the workflow action of which this is an instance.
Error Message	For workflow instances in the error state, this field shows the reason why this instance of the workflow action terminated.
Initiated By	The name of the user whose action triggered this instance of the workflow rule.
Initiated On	The date and time when this instance of the workflow rule was triggered.
Resumes On	For workflow instances in the pending state, this field shows the date and time that the wait period for this instance of the workflow action will end.
Terminated On	For workflow error instances, this field shows the date and time that this instance of the workflow action terminated.

For more information about using the Workflow Monitor, see:

- [Workflow Monitor](#) (on page 1247)

- [Viewing Workflow Instances](#) (on page 1249)
- [Deleting Instances from the Workflow Monitor](#) (on page 1250)

Related Topics

See the following topic for related information about workflow rules:

- [Workflow Configuration](#) (on page 1211)

Data Rules and Assignment

Click a topic to see step-by-step instructions for procedures for setting up assignment rules (to assign records automatically), forecast definitions, lead conversion layouts and mappings, sales methodologies, and industries:

- [Setting Up Assignment Rules](#) (on page 1257)
- [Mapping Additional Fields During Lead Conversion](#) (on page 1264)
- [Creating Lead Conversion Layouts](#) (on page 1264)
- [Setting Up the Forecast Definition](#) (on page 1267)
- [Updating the Forecast Definition](#) (on page 1273)
- [Setting Up Sales Processes, Categories, and Coaches](#) (on page 1274)
- [Customizing Your Company's Industry List](#) (on page 1281)

Related Topics

See the following topics for related information:

- [About Assignment Rules](#) (on page 1253)
- [Lead Conversion Administration](#) (on page 1262)

About Assignment Rules

Before you begin. To set up the assignment rules, your role must include the Data Rules and Assignment privilege.

Assignment rules allow you to automatically assign a lead, an opportunity, a service request, or an account to the appropriate person, team, and territory, based on the rules (called rule groups) that you set up.

If your company has selected the group assignment option, all group members share the records you assign to a member of that group. For more information, see [Group Management](#) (on page 1204).

Depending on your company's structure and business processes, assignment rules can be simple. For example:

- Sales leads for each geographic region are assigned to the regional sales manager.
- New service requests are assigned to the technical service manager.

Or, the rules can be more complex. For example:

- Most leads are assigned by product expertise and geographic location, but some are assigned to a telemarketing manager.
- Most service requests are assigned by problem area, but all requests involving a particular product are routed to one person.

The following table describes how you can assign record types:

This record type	Has these assignment options
Accounts	You can assign the records to an employee or territory. Additionally, you can specify teams that share ownership of the newly assigned accounts.
Leads	You can assign the records to an employee.
Opportunities	You can assign the records to an employee or a territory. Additionally, you can specify teams that share ownership of the newly assigned opportunities.
Service Requests	You can assign the records to an employee.

The assignment rules in the active rule group are evaluated when the following occurs in relation to a record type:

- For leads: The Reassign Owner check box is selected.
- For service requests:
 - The service request is created without an owner or the owner is deleted from the record (that is, the Owner field is blank).
 - The Reassign Owner check box is selected.
- For accounts: The Reassign Owner check box is selected.
- For opportunities: The Reassign Owner check box is selected.

NOTE: When a lead or service request is assigned an owner, an email is sent to the new owner. You can turn off email notification for Service Requests on a per-rule basis by clearing the Send Email Notification check box (flag) on the Service Request Assignment Rule Edit page. To do this, click the Admin global link, click Data Rules and Assignment, and then click Service Request Assignment Rules. Click the link for the rule group and then click the Edit link for the rule.

Tracking the Reassignment Process

You can use three fields to help you to track the owner reassignment process, or to run analyses to determine how long the reassignment process takes. You can add these fields to Account, Opportunity, Lead, and Service Request page layouts. The fields are:

- Assignment Status
The status can be Queued (the record is in the queue to be processed by assignment manager), or Processing (the record is currently being processed by assignment manager), or blank (the record is neither in the queue or being processed).
- Last Assignment Submission Date
If the record is queued for processing or is currently being processed by assignment manager, this field shows the date and time the record was saved with the Reassign Owner check box selected.

However, in the case of a service request record, this field shows the date and time the record was saved with the Owner field blank.

■ Last Assignment Completion Date

If a record has never been reassigned, this field is blank; otherwise, the field shows the date and time the record was last reassigned.

For more information on adding fields to page layouts, see [Customizing Static Page Layouts](#) (on page 1057).

Making Rule Groups Active

You can create multiple assignment rule groups, but only one rule group can be active at a time for each record type.

CAUTION: The rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you create a new rule group, and mark it active, do not delete the previously active rule group until after the rules have been released.

TIP: Rule groups can serve as historical reference for the leads. Instead of deleting rule groups, you can mark them as inactive.

About Group Assignment

If your company assigns records to entire groups instead of one employee, your company administrator must:

- 1 Select the Default Group Assignment field in the Company Profile page (see [Setting Up Your Company Profile and Global Defaults](#) (on page 996)).
- 2 Set up the groups before activating the assignment rules (see [Setting Up Groups](#) (on page 1206)).
- 3 Select one member in the group to be the owner for accounts or opportunities during the assignment procedure.

NOTE: The group functionality is not supported for lead or service request records.

When the record is assigned to an owner in the group:

- The Owner field shows the owner's information.
- The Primary Group field shows the group name that the owner belongs to on the record Edit and Detail pages, if the company administrator added the field to the layout.
- The record appears in the areas of the applications that normally display that employee's records, such as Homepages and record lists.

Generally, all members in the group have full access to the record, although access levels can be adjusted to restrict a user's access.

Scenario for Assigning Leads

The following is an example of a typical company's business rules for assigning leads. To set up the rules that automatically assign this company's leads, the administrator does the following:

- 1 States the company's business rules for assigning leads to people.

For example, for accounts in the U.S., many sales territories are assigned by state, but in certain states, the product expertise determines the territory assignments. In addition, Corporation XYZ account is always assigned to one particular sales manager regardless of the lead's state or product interest.

- 2 Lists all of the assignment scenarios that are necessary to cover the business rules:

- **Account (company) is Corporation XYZ.** Assign to Sales Manager A.
- **Primary Address - State is CA, NV, OR, WA.** Assign to Sales Manager B.
- **Primary Address - State is OH, IN, MI, NY, KY.** Assign to Sales Manager C.
- **Lead is interested in the ABC Product (in all states except those listed already, and not for Corporation XYZ).** Assign to Sales Manager D.
- **Primary Address - State is not listed.** Assign to Sales Manager E.

- 3 Puts the scenarios in the order in which they are to be considered.

First, examine the Account field. If the value is Corporation XYZ, assign the lead to Sales Manager A, regardless of any other conditions. If this criterion is not matched, examine the Primary Address State field. If the value is CA, NV, OR, or WA, assign the lead to Sales Manager B, and so on.

As a best practice, use the Record Assignment Template to help you plan your company's assignment scenarios, and to set up rules that give you the results you want.

Criteria Conditions in Assignment Rules

You can use the following conditions in the criteria on assignment rules:

- **Between.** Matches the rule to records where the value in the criterion field is between two values defined on the rule criterion. (The results do not include records where the value in the criterion field is equal to one of the values on the rule.) Use a comma to separate the values. Do not use a dash (-) to specify a value range or to separate values.

Use the Between condition for date fields only. Use the MM/DD/YYYY date format.

- **Contains all values.** Matches the rule to records where the criterion field contains the criterion value on the rule. For example, if you enter *qual* as the criterion value, the rule is matched to records where the criterion field contains a value that includes the string *qual*, such as *qualifying* or *qualified*.

You cannot use the Contains all values condition for date fields or number fields.

- **Contains exact field value.** Matches the rule to records where the criterion field contains all of the string in the criterion field value, and no additional characters. For example, if you enter *Closed* as the criterion value, the rule is matched to records where the criterion field value is *Closed*, but not records where the criterion value is *Closed/won*.

You cannot use the Contains exact field value condition for date fields or number fields.

- **Contains none of the values.** Matches the rule to records where the criterion field contains any values that are not equal to the rule criterion value.

You cannot use the Contains none of the values condition for date fields or number fields.

- **Less than or equal to.** Matches the rule to records where the value in the criterion field is less than or equal to the rule criterion value.

You can use the Less than or equal to condition for number fields and currency fields only.

- **Greater than or equal to.** Matches the rule to records where the value in the criterion field is greater than or equal to the rule criterion value.

You can use the Greater than or equal to condition for number fields and currency fields only.

Note the following points regarding rule criteria:

- A rule without criteria always succeeds.
- Rules are evaluated in sequential order, and evaluation stops when the criteria on a rule are met.

For example, if ten rules are being evaluated and the criteria on rule 6 are met, then rules 7, 8, 9, and 10 are ignored (that is, they are not evaluated). Similarly, if there are no criteria on rule 6, rule 6 succeeds, and rules 7, 8, 9, and 10 are ignored.

For step-by-step instructions on how to set up assignment rules, see [Setting Up Assignment Rules](#) (on page 1257).

Setting Up Assignment Rules

Before you begin:

- To set up the assignment rules, your role must include the Data Rules and Assignment privilege.
- For information about designing your assignment rules, see [About Assignment Rules](#) (on page 1253).

Assignment Rule Group Example

Rule groups are made up of rules, which, in turn, are made up of criteria. The following figure shows the components of a rule group.

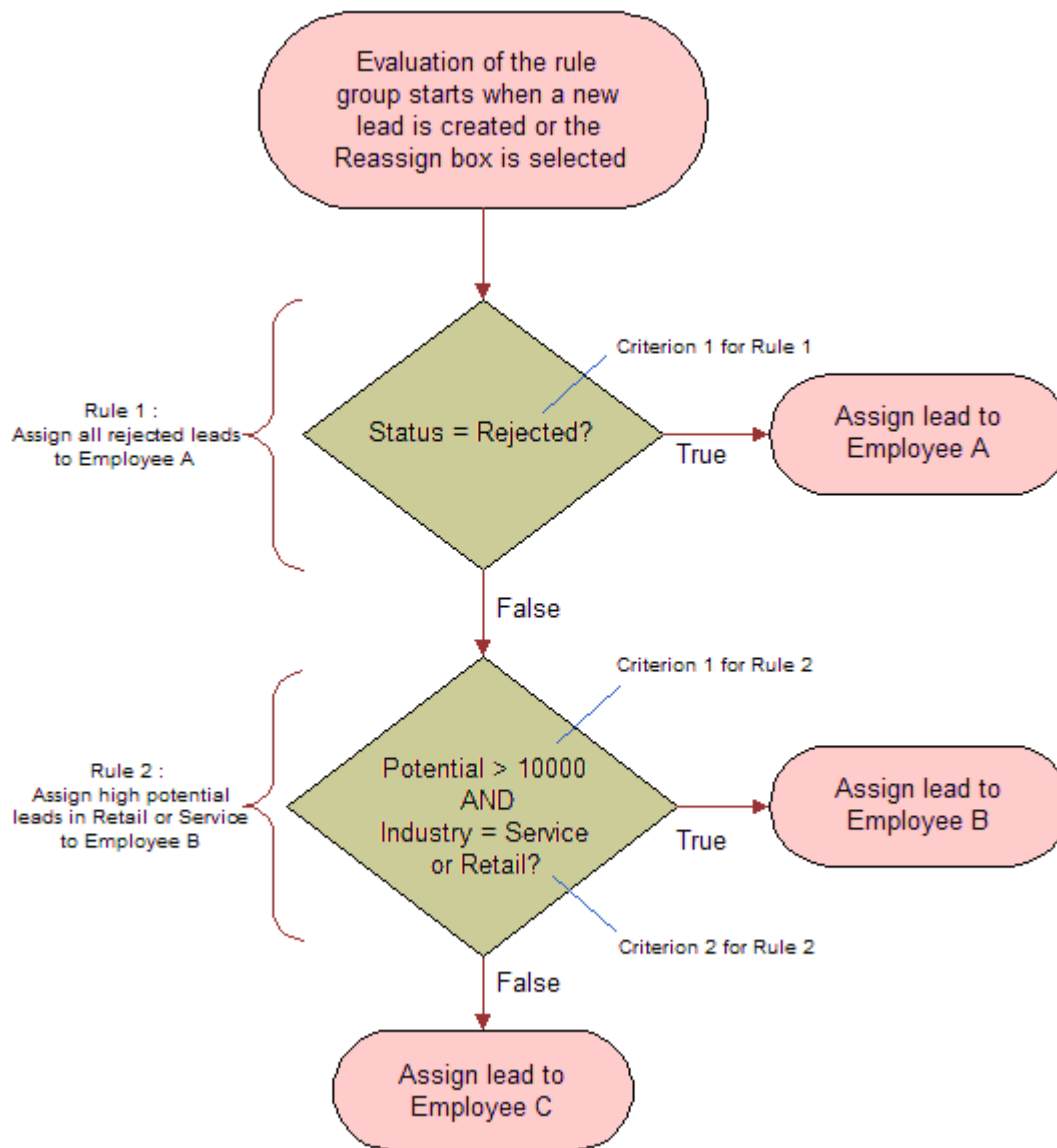


Figure 6: How a Lead Assignment Rule Group Is Evaluated

NOTE: For correct behavior of the Reject button on the Lead Detail page, the first rule in the rule group must assign rejected leads.

To set up assignment rules

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.

- 3** In the Assignment Rules section, click the link for the appropriate record type.
A list of all of the rule groups that have been defined for your company to date appears.

- 4** Create a new rule group:

- a** Click the New Rule Group button.
- b** On the New/Edit page, fill in the fields.

Field	Description
Rule Group Name	A unique name, up to 30 characters.
Active Rule Group	Only one rule group can be active at a time. If you specify a new rule group as active, the previously-activated rule group becomes inactive.
Unassigned Owner	An employee who inherits the records that are not assigned by one of the rules. Example: Employee C in Figure 1.
Return E-mail	This field appears for lead and service request rule groups only. The email address appears in the From field on the assignment email notifications that are sent to the owners of leads and service requests. NOTE: No email notifications are sent for account and opportunity records.
Unassigned Account Territory	A territory that inherits the records that are not assigned by one of the rules. This field appears for account rule groups only.
Unassigned Opportunity Territory	A territory that inherits the records that are not assigned by one of the rules. This field appears for opportunity rule groups only.

- c** Save the record.
This saves the name of the new rule group in preparation for adding rules to the rule group.

- 5** Add a rule to the rule group:

- a** In the Rules title bar on the Rule Group Detail page, click New.
- b** On the New/Edit page, fill in the fields.

The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
-------	-------------	---------

Field	Description	Example
Rule Name	A unique name.	Assign high potential leads in Retail or Service
Order	The order in which the rules are evaluated. When the criteria on one rule are met, the record is assigned and subsequent rules are ignored.	1
Assign To Owner	If the rule criteria are met, the record is assigned to this user. For group assignment of accounts and opportunities, the user must be a member of the group sharing the records.	Employee B
Assign To Territory	If the rule criteria are met, the record is assigned to this territory. This field appears for account and opportunity rules only.	North Eastern Region
Include Related Contacts	If the rule criteria are met, the contacts linked to the account are assigned to the specified account owner and territory. This field appears for account rules only.	Not applicable
Include Related Opportunities	If the rule criteria are met, the opportunities linked to the account are assigned to the specified account owner and territory. This field appears for account rules only.	Not applicable
Include Team Assignment	If the rule criteria are met, the team members are assigned to the account. This field appears for account and opportunity rules only.	Not applicable

- c** Save the record.

This saves the rule so you are now ready to add criteria to the rule.

- 6** (Optional) For accounts and opportunities, update the access for linked records and users:

- a** On the Rule Group Detail page, click the Name link of the rule where you want to update the access for linked records and users.
- b** On the Rule Detail page, click Add Users or Edit Users in the Team Assignment title bar.

- c Click the Lookup icon and select the users.
- d Assign the access level for accounts, contacts, and opportunities.
- e Save your changes.

7 Add a rule criterion to the rule:

- a In the Rule Criteria title bar on the Rule Detail page, click New.
- b On the New/Edit page, fill in the fields.

The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Field	Name of the field to be evaluated. NOTE: If a field has been relabeled, the new field name appears.	Potential Revenue
Condition	The following conditions cannot be used for date fields or number fields: Contains all values, Contains exact field value, and Contains none of the values. The following conditions can be used for number fields and currency fields only: Greater than or equal to, Less than or equal to. The Between operator can be used for date fields only.	Greater than or equal to
Value(s)	Use commas to separate values. If the value you want to match includes a comma, such as an address, enclose the value in quotation marks. If the condition is Between, enter the minimum and maximum values separated by commas.	10000

- c Do one of the following:
 - If you want to add more criteria to the rule, click Save and New Rule Criteria and go back to Step b. If you have multiple criteria defined for a rule, the record must match *all of the criteria* in order for the rule to be matched.
 - If you have entered all criteria for the rule, click Save.

8 In the Rule title bar on the Rule Detail page, click Back to Rule Group Detail.

9 On the Rule Group Detail page, do one of the following:

- If you want to add more rules to the rule group, go back to Step 5.
- If you have entered all the rules for the rule group, click Back to Rule Group List to finish.

TIP: Rules are executed in the order they appear in the Rule Group, so make sure they appear in the correct sequence. After one rule is met, subsequent rules are ignored.

To edit, activate, or inactivate a rule group

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Assignment Rules section, click the link for the type of assignment rules that you want to edit.
A list of all the rule groups of that type that have been defined for your company to date appears.
- 4 Click the Rule Group link that you want to update.
- 5 On the Rule Group Detail page, click Edit.
- 6 Update the fields, and save the record.

The changes that you make take effect at midnight Oracle Server time (default), or whenever your assignment rule groups have been set to update.

CAUTION: When you mark a rule group *active*, the rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you mark a rule group *active*, do not delete the previously active rule group until after the rules have been released.

To edit assignment rules

- 1 On the Rule Group Detail page, click the Edit link of the rule that you want to change.
- 2 Update the fields.

NOTE: You can change the order in which rules are evaluated by editing the Order field. On the rule that you want to change, enter an order number that is higher than the order number of the rule that is to precede the rule you are changing, and lower than the order number of the rule that is to follow it.

For example, if there are three rules, ordered 1 through 3, and you want to change the order so that the rule that is currently number 1 is evaluated after the rule that is currently number 2, change the order of rule number 1 to a value, such as 2.1 (or any value greater than 2 and less than 3).

- 3 Save the record.

Lead Conversion Administration

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records.

When users convert a lead record, they can do one of the following:

- Create new account, contact, opportunity, or deal registration records, which are linked automatically to the lead record.
- Link the lead record to existing account and contact records. Users select the records that they want to link to the lead when they convert the lead.

You can determine which options are available to users on the Convert Lead page by creating lead conversion layouts for the page, and assigning these layouts to user roles.

During the lead conversion, some values are carried over to the new records by default. However, you can extend the amount of information that is carried over by mapping additional fields, including custom fields.

To convert leads, users must have the appropriate access to record types and the appropriate privileges in their role.

When users reject a lead, they must select a rejection code in the Reject Code field in the Reject a Lead page. A number of values are provided by default for the Reject Code field, but you can change these values or add more values to the list. For more information about the Reject Code picklist, see [Reject Code for Leads](#) (on page 1266).

Related Topics

For more information about lead conversion administration, see the following topics:

- [Process of Setting Up Lead Conversion](#) (on page 1263)
- [Mapping Additional Fields During Lead Conversion](#) (on page 1264)
- [Creating Lead Conversion Layouts](#) (on page 1264)

Process of Setting Up Lead Conversion

To set up lead conversion and rejection settings for your users and record types, perform the following tasks:

- 1 If you want to map additional fields during lead conversion, set up the new mappings.
For more information on mapping fields, see [Mapping Additional Fields During Lead Conversion](#) (on page 1264).
- 2 If you want to customize the layout of the Convert Lead page:
 - a Create the new layouts.
For more information on creating layouts, see [Creating Lead Conversion Layouts](#) (on page 1264).
 - b Add the new layouts to the appropriate roles.
For more information on adding roles, see [Adding Roles](#) (on page 1173).
- 3 Make sure that the users have the appropriate access to record types and the appropriate privileges in their role.
For more information about the settings that are required for converting leads, see [Access Profile and Role Settings for Converting Leads](#) (on page 168).
- 4 If you want to edit the values in the Reject Code picklist, edit the field values.
For more information on editing field values, see [Creating and Editing Fields](#) (on page 1043). For more information about the Reject Code picklist, see [Reject Code for Leads](#) (on page 1266).

Mapping Additional Fields During Lead Conversion

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records.

When users convert leads to account, contact, opportunity, or deal registration records, some values are carried over to the new records by default. However, you can extend the amount of information that is carried over by mapping additional fields, including custom fields.

NOTE: Do not map Web link fields for lead conversion. Web link fields do not contain data, instead, they contain scripts for links that users can click to perform actions. The contents of Web link fields cannot be carried over to the new records when a lead is converted.

When users convert a lead record, the values in the mapped fields are carried over as follows:

- When users create new account, contact, opportunity, or deal registration records, the values from the mapped fields on the lead record are carried over to the specified fields in the new record.
- When users link the lead record to existing account, contact, opportunity, or deal registration records that they select when converting the lead, the fields in the existing records that already have values remain unchanged. Fields that are empty are updated with the value from the mapped lead field.

About Customized Picklist Fields and Values

You can map picklist fields from the lead record to text fields (long or short) on account, contact, opportunity, and deal registration records, or to a picklist field with identical values.

Before you begin. To perform the following procedure your role must include the Data Rules and Assignment privilege.

To map additional fields when converting a lead record

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Data Rules & Assignment.
- 3 In the Lead Conversion Administration section, click Lead Conversion Mapping.
- 4 On the Lead Conversion Mapping page, select the fields to map.
- 5 To revert the mapping back to the default settings, click the Default button in the title bar.
- 6 Click Save.

Creating Lead Conversion Layouts

You can specify what options are available to users when they convert leads, by creating customized layouts for the Convert Lead page, and then assigning the layouts to user roles.

NOTE: To convert leads to accounts, contacts, opportunities, or deal registrations, users must also have the appropriate settings in their access profiles and role. For more information about the settings that are required for converting leads, see [Access Profile and Role Settings for Converting Leads](#) (on page 168).

The following table shows the options that you can make available on the Convert Lead page.

Record Type	Options
Account	Do Not Convert to Account Use Existing Account Auto-create New Account
Contact	Use Existing Contact Auto-create New Contact
Opportunity	Do Not Convert to Opportunity Auto-Create New Opportunity
Deal Registration	Do Not Create Deal Registration Auto-Create Deal Registration NOTE: The Deal Registration options are applicable only if your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition.

A standard layout is provided. The standard layout includes all of the options for accounts, contacts and opportunities, but not the options for deal registrations. You can copy the standard layout and then edit the copy, but you cannot edit or delete the standard layout.

Depending on the options you make available for a record type, the record type sections on the Convert Lead page are affected as follows:

- If you do not make any of the options available for a record type, the Convert Lead page does not include a section for that record type.
- If you make only the Do Not Convert to Account option available for the Account record type, the Accounts section page does not appear on the page.
- If you make only the Do Not Convert to Opportunity option available for the Opportunity record type, the Opportunity section does not appear on the page.
- (Applicable in Oracle CRM On Demand Partner Relationship Management Edition only) If you make only the Do Not Create Deal Registration option available for the Deal Registration record type, the Deal Registration section does not appear on the page.

Before you begin. To perform the procedure described in this section, your role must include the Data Rules and Assignment privilege.

To create a lead conversion layout

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Data Rules & Assignment.
- 3 In the Lead Conversion Administration section, click Lead Conversion Layout.
- 4 In the Lead Conversion Layout List page, click New Layout.

- 5 In Step 1, Layout Name:
 - a Enter the name for the layout.
 - b (Optional) Enter a description for the layout.
 - c If you want this layout to be the default for all users, select the Default Lead Conversion Layout check box.

NOTE: By default, the Standard Lead Conversion Layout provided in Oracle CRM On Demand acts as the default lead conversion layout for the company unless another layout is marked as the default. If you create another layout, and select the Default Layout check box for the new layout, the Standard Lead Conversion Layout will no longer be the default. So, the Standard Lead Conversion Layout is the default layout for the company only when the Default Layout check box is not selected for any other layout. However, the Default Layout check box for the Standard Lead Conversion Layout always remains unselected, even when it is acting as the default.
- 6 In Step 2, Select Actions, highlight the record type for which you want to select the actions (Account, Contact, Opportunity, or Deal Registration) in the Lead Conversion Record Type section, and then click the arrows to move the actions you want to display on the page from the Lead Conversion Available Actions section to the Lead Conversion Selected Actions section. Repeat this step for each of the record types.
- 7 In Step 3, Confirm, review your selections, and if necessary, return to Step 2, Select Actions to change your selections.
- 8 Click Finish to save your changes.

Reject Code for Leads

When users reject a lead, they must select a rejection code in the Reject Code field in the Reject a Lead page. Users can also enter a text description of the reason for the rejection in the Reject Reason field. If a user selects the *Other* value in the Reject Code field, the Reject Reason field becomes a required field, and the user must enter a description of why the lead was rejected. Otherwise, the Reject Reason field is optional.

A number of values are provided by default for the Reject Code field, but you can change these values, or add more values to the list. The default values are:

- 3rd Party Contact
- Do Not Contact Again
- Duplicate
- Failed to Reach Contact
- Inappropriate Contact
- Insufficient Data
- Invalid Phone Number
- No Business Opportunity
- Opportunity in Progress
- Other

- Recently Contacted (<30 days)
- Data Entry/System Error
- Already Owns Product
- Targeting Criteria Not Met

For information about editing picklist values, see [Creating and Editing Fields](#) (on page 1043).

NOTE: If you rename the *Other* value, the Reject Reason field still becomes a required field when the user selects the renamed value in the Reject a Lead page.

Setting Up the Forecast Definition

Forecasts in Oracle CRM On Demand automate the generation of sales forecasts according to the settings that you define. Forecasts are generated automatically on either a weekly or monthly basis. Each generated forecast is saved to the archive, providing a historical record that you can refer to and analyze.

Every forecast is a snapshot of information about revenue and potential revenue for the quarter. Forecasts enable sales professionals and managers to track their quarterly sales performance against planned quotas, actual closed revenue, and expected revenue, given the current status of their sales opportunities.

Participants in forecasts are chosen by role. Your company's reporting structure, and the roles you choose for the forecast participants must be set up so that the participants roll up to one top-level user. Typically this top-level user is a company vice-president or chief executive officer (CEO).

When you generate a forecast, Oracle CRM On Demand alerts employees that the forecast has been created and is ready for review by posting an alert on My Homepage for each participant for two days. To extend the period during which the alert appears, update the Expiration Date field for that alert. For information on alerts, see [Publishing Company-Wide Alerts](#) (on page 1019).

Determining the Forecast Type

Your company can base its forecasts on any of the following: opportunities, products, accounts, or contacts. There are four types of forecasts:

- Opportunity product
- Opportunity revenue
- Account revenue
- Contact revenue

Your company can generate multiple forecast types on the specified forecast dates set for forecast generation. When you select the forecast settings for your company, you determine which forecast types your entire company uses.

NOTE: Each forecast type requires sales employees to take certain actions. Make sure to communicate which types of forecast you will be using before your sales employees begin creating opportunity, account, and contact records.

Opportunity Product Forecasts

Opportunity product forecasts report on the products linked to an opportunity. The forecast numbers for the opportunity product forecasts are calculated from the Quantity, Revenue, and Expected Revenue fields on all products that are owned by a forecast participant and have revenue that is scheduled to be recognized during the forecast period. The revenue for a product can be reported at one time, or it can be reported during several periods.

Opportunity product forecasts require sales representatives to link products to their opportunity records. Sales representatives must also fill in the quantity, purchase price, and the start and close date to indicate which products they want to include in their forecasts.

To be included in the forecast, an opportunity product record must:

- Have a close date during the forecast period
- Be owned by a forecast participant

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see [About Opportunities and Forecasts](#).

Set up an opportunity product forecast if your company wants to forecast one-time or recurring revenue that is based on products.

Opportunity Revenue Forecast

Opportunity revenue forecasts report on the revenue noted in the opportunity records. The forecast numbers are calculated from the Revenue and Expected Revenue fields on all opportunity records where the following conditions apply:

- The opportunity has a close date during the forecast period
- One of the following is true:
 - The opportunity is owned by a forecast participant
 - A forecast participant is a member of the opportunity team and has a share of the opportunity revenue that is greater than zero percent (that is, the value in the Split % field on the Opportunity Team page is greater than zero).

NOTE: For revenue on an opportunity to be shared among team members, the **Enable Opportunity Revenue Split** check box must be selected on the company profile.

Opportunity revenue forecasts require sales representatives to fill in the opportunity Revenue and Close Date fields to indicate which opportunities they want to include in their forecasts. Any linked products are ignored in the forecast.

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see [About Opportunities and Forecasts](#) (on page 210).

Set up an opportunity revenue forecast if you want to forecast total opportunity revenue, regardless of how much revenue comes from individual products.

Account and Contact Revenue Forecasts

Account revenue and contact revenue forecasts report on the revenue listed on revenue records that are linked to account or contact records. The forecast numbers are calculated from the Revenue and Expected

Revenue fields for the records that meet the criteria for inclusion in the forecast. To be included in the forecast, an account or contact revenue record must meet the following conditions:

- The record must be owned by a forecast participant.
- The record must have a status of Open, Pending, or Closed.
- The record must have the Forecast field selected.
- The record cannot be linked to an opportunity.
- The record must have revenue that is scheduled to be recognized during the forecast period.

The revenue for an account or contact can be reported at one time, or it can be set up to recur over time. Account revenue and contact revenue forecasts require users to link revenues to their account or contact records. Users must also update the Start/Close date, Status, and Forecast fields on the revenue record to indicate which products they want to include in their forecasts.

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see [Tracking Revenue Based on Accounts](#) (on page 189), and [Tracking Revenue Based on Contacts](#) (on page 203).

Set up an account or contact revenue forecast if your company wants to forecast one-time or recurring revenue.

Selecting Forecast Duration

You can configure forecasts to display revenue projections for up to four quarters. With the extended forecast capability, you can view a forecast for the current quarter, and for the following one, two, or three quarters.

By default, the forecast duration is set to one quarter (meaning only the current quarter is included in the forecast). When you change the duration setting to include multiple quarters, the forecast includes the current quarter as well as future quarters. For example, if you select a two-quarter forecast duration, the forecast includes the current quarter and the next quarter.

Designating Forecast Roles

As part of your forecast definition, you select which roles are to be included. When you add a role to the forecast definition, all users who are assigned that role are designated as forecast participants.

User Setup for Forecasts

The users that you intend to include in your company's forecasts must be set up correctly. Their user records must meet the following conditions:

- The record must have a valid value in the Role field.
- The record must have a valid value in the Reports To field or in the Reports To (Alias) field, depending on which of these fields appears on the page layout for the user record.
- The status of the user must be set to Active unless you select the option to allow forecasts for inactive users.

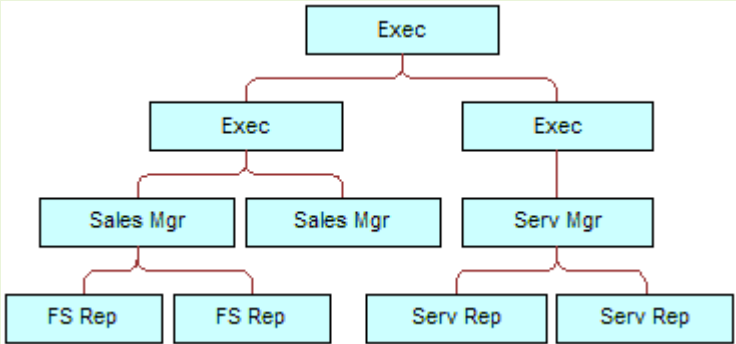
CAUTION: If any of the users included in the forecast are set up incorrectly, the entire forecast will fail.

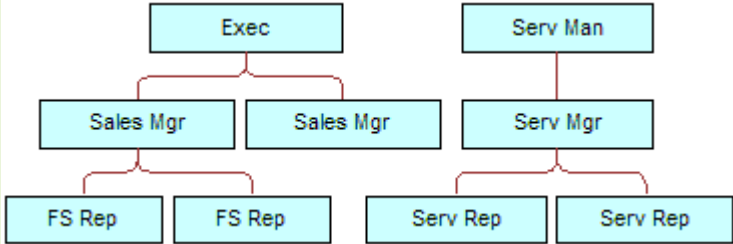
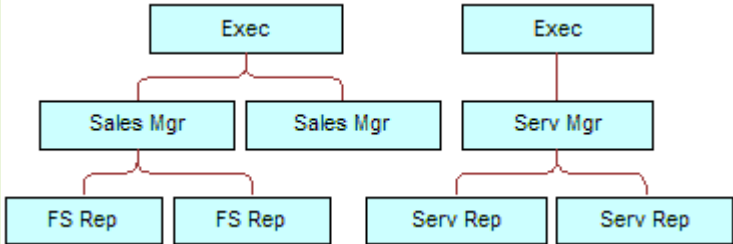
Examples of Reporting Structures and Roles for Forecasting

To generate forecasts you must set up your company's reporting structure correctly. The forecast hierarchy is based on the hierarchy specified in the Reports To or Reports To (Alias) field on the user records. All forecast participants, except for one top-level user, must report to another forecast participant, so that all individual forecasts roll up to one company-wide forecast. If there is more than one forecast participant who does not report to another forecast participant, or if any manager with forecast participants as direct reports has a status of Inactive, then the forecast will fail.

NOTE: If the forecast fails to generate because of a problem with the reporting structure, the primary contact (indicated on the company profile) receives an email notification from Customer Support. After the reporting structure has been corrected and the forecast has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

The following table shows reporting structure and participant role combinations that work and don't work for forecast generation.

For This Reporting Structure	Forecasting Works or Fails	Because
 <pre> graph TD Exec1[Exec] --> Exec2[Exec] Exec1 --> Exec3[Exec] Exec2 --> SalesMgr1[Sales Mgr] Exec2 --> SalesMgr2[Sales Mgr] Exec3 --> ServMgr[Serv Mgr] SalesMgr1 --> FSRep1[FS Rep] SalesMgr1 --> FSRep2[FS Rep] SalesMgr2 --> FSRep3[FS Rep] SalesMgr2 --> FSRep4[FS Rep] ServMgr --> ServRep1[Serv Rep] ServMgr --> ServRep2[Serv Rep] </pre>	Works with this role combination:	Participants roll up to one top-level participant.
	<ul style="list-style-type: none"> Executive Sales Manager Field Sales Rep 	
	Fails with this role combination:	Participants do not roll up to one participant. They roll up to two sales managers.
	<ul style="list-style-type: none"> Sales Manager Field Sales Rep 	
	Fails with this role combination:	The field sales reps roll up to a sales manager who is not a participant.
	<ul style="list-style-type: none"> Executive Field Sales Rep 	

For This Reporting Structure	Forecasting Works or Fails	Because
	Works with this role combination: <ul style="list-style-type: none"> Executive Sales Manager Field Sales Rep 	Participants roll up to one participant.
	Fails with this role combination: <ul style="list-style-type: none"> Executive Sales Manager Field Sales Rep 	Two participants report to no one. Only one participant in the forecast (at the top of the structure) can report to no one.

Including Inactive Users in Forecasts

Forecasts can include inactive users as well as active users. When you set up your forecast definition, you indicate whether inactive users are to be included in the forecasts.

Allowing Managers to Submit Forecasts for their Direct Reports

When you set up your forecast definition, you indicate whether managers can automatically submit forecasts for their direct reports when they submit their forecasts.

Forecasts and Custom Fiscal Calendars

When using custom fiscal calendars, your company's custom fiscal calendar definition are used in the generation of forecasts and therefore the forecast period months align with the custom fiscal calendar months.

Your company administrator must create a custom fiscal calendar record for each year for which you want to create forecasts in Oracle CRM On Demand. If a sufficient number of fiscal calendars needed to support the selected forecast duration have not been created, it prevents the forecast series from generating and forecasts from being created.

NOTE: If the forecast fails to generate because of insufficient fiscal calendars, the primary contact (indicated on the company profile) receives an email notification from Customer Support. After the fiscal calendar records to support the forecast definition have been created, and the forecast definition has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

The following procedure describes how to set up the forecast definition.

To set up the forecast definition

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 Under the Forecast Administration section, click Forecast Definition.
- 4 On the Forecast Definition page, click Update.
- 5 In Step 1, Select Forecast Types, select the Active check box for each forecast type that you want to generate.

Your company can forecast sales revenue that is based on opportunity products, opportunity revenue, account revenue, and contact revenue.
- 6 In Step 2, Select Forecast Frequency:
 - a In the Forecast Duration field, select the forecast duration.

NOTE: The fiscal calendar settings selected for your company determine the duration of each quarter. The start date and end date of the forecast duration will be calculated according to the fiscal calendar start date and fiscal calendar type set on your company profile. For the fiscal calendar type of Custom Fiscal Calendar, the start and end dates are based upon the fiscal calendar as defined by your company administrator.
 - b In the Create Forecast Snapshot Each field, specify how frequently the forecast snapshot is to be created.

You can select weekly or monthly or monthly forecasts.

NOTE: If you select Month, the selected fiscal calendar type for your company determines the length of the month.
 - c In the Forecast Snapshot Day field, select the day of the month or the week that the forecast snapshot is to be created.

Forecasts are generated at the start of the selected day (that is, at one minute past midnight) in the time zone of the hosting facility. If your forecast is monthly and the current month does not contain the day selected as the day for the forecast to be generated, Oracle CRM On Demand adjusts the snapshot to generate a forecast on the last day of the month. For example, if the Forecast Snapshot Day is set to the 30th, and the current month is February, Oracle CRM On Demand adjusts the forecast snapshot to generate the forecast on the 28th.
- 7 In Step 3, Select Forecast Roles:
 - a Add the roles for those users who are to participate in the forecast to the Forecasting Roles area. Click the arrows to move company roles to the Forecast Roles list.
 - b To allow forecasts for inactive users, select the Allow Forecasts for Inactive Users check box.
 - c To allow a manager to submit forecasts automatically for their direct reports, select the Auto-submit forecasts for team upon manager submit check box.
- 8 Click Finish.

- 9 On the Forecast Definition page, verify the forecast details by reviewing the forecast snapshot frequency, the forecast snapshot day, next forecast series dates, and the list of forecast series participants.

CAUTION: After you set up your forecast definition, certain changes to user records or fiscal calendars require you to update your forecast definition settings. For more information, see [Updating the Forecast Definition](#) (on page 1273).

Updating the Forecast Definition

You can update your company's forecast definition to change the forecast frequency, or to add or remove roles, and so on. In addition, when certain changes are made to user records, or if your fiscal calendar is modified, you must update the forecast definition so that it incorporates the changes.

You must update your forecast definition when any of the following changes are made:

- The manager for a forecast participant is changed. The manager information is stored on the user record of the forecast participant, in the Reports To field or the Reports To (Alias) field, depending on which of these fields appears on the page layout for the user record.

If the manager for a forecast participant is changed, you must update the forecast definition as follows:

- If the role assigned to the new manager is not currently included in the forecast definition, then you must add the role to the forecast definition.
- If the role assigned to the new manager is currently included in the forecast definition, then you must refresh the forecast definition so that the new reporting structure is reflected in future forecasts.

NOTE: The forecast participant hierarchy must include managers for everyone except the person at the top level.

- Users who are participants in the forecast hierarchy are deactivated.

When an employee leaves your company, you must change the status for that user to Inactive. If the inactive employee was a manager in the forecast hierarchy, then the user record of any forecast participant who reports to that employee must also be updated.

In this case, you must update the forecast definition as follows:

- If the role assigned to the new manager is not currently included in the forecast definition, then you must add the role to the forecast definition.
- If the role assigned to the new manager is currently included in the forecast definition, then you must refresh the forecast definition so that the new reporting structure is reflected in future forecasts.

NOTE: If your forecast definition allows forecasts for inactive users, then you do not need to update the forecast definition when a forecast participant is made inactive.

- Users are added to, or removed from the roles included in the forecast definition.

In this case, you only need to refresh the forecast definition so that it incorporates the changes.

- Changes are made to your fiscal calendar.

In this case, you only need to refresh the forecast definition so that it incorporates the changes.

NOTE: You must refresh the forecast definition when a change is made to your fiscal calendar, regardless of the type of fiscal calendar your company uses (standard or custom).

NOTE: When any of the changes described here are made in Oracle CRM On Demand, the forecasts that are generated do not reflect the changes until the forecast definition is updated.

The following procedure describes how to update the forecast definition.

To update the forecast definition

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.
- 3** Under the Forecast Administration section, click Forecast Definition.
- 4** On the Forecast Definition page, click Update.
- 5** In Step 1: Select Forecast Type, if any changes are needed, make the changes.
- 6** Click Step 2: Select Forecast Frequency.
- 7** If any changes are needed in Step 2: Select Forecast Frequency, make the changes.
- 8** Click Step 3: Select Forecast Roles.
- 9** If any changes are needed in Step 3: Select Forecast Roles, make the changes.
- 10** Click Finish.

Your forecast definition is automatically updated and a summary of the definition, including the updated list of forecast participants, is displayed on the Forecast Definition page.

Setting Up Sales Processes, Categories, and Coaches

You can create a customized sales methodology that reflects the requirements and complexity of your sales environment, and guides your sales representatives as they work on deals at various sales stages.

You can adjust the sales stage information to reflect your company's sales process or business practices. When employees create and update opportunities, they select a sales stage that represents how far along the opportunity is in the sales process. Each sales stage is tied to a percentage. That information is used with reports and forecasts, including your pipeline, expected revenue, and closed revenue calculations.

As part of customizing the sales stage values themselves, you can:

- Rename the sales stages
- Add or delete sales stages
- Change the sequence of the sales stages
- Change the probability percentages associated with the sales stages

About Sales Processes

Some sales environments require only one sales process with one set of sales stages. Other sales environments are more complex and require multiple sales processes with distinct sales stages for each process. For example, internal sales representatives might follow a different sales process from the one followed by field sales representatives.

Additionally, sales representatives might need to follow different sales processes for different types of opportunities. For example, when your sales representatives are selling a piece of equipment, they might need to follow a longer, multi-stage sales process. But when they are selling a service contract, the process might be shorter and have fewer sales stages.

To further refine your sales methodology, you can define series of sales stages as sales processes and link each process to one of these:

- Opportunity type
- User's role

This allows you to customize the sales process (and sales stages with each process) for different opportunity types or different user roles.

Example: Your sales representative creates a new opportunity. When entering information about the opportunity, she selects Service from the Opportunity Type options. This causes the application to display the sales process appropriate for that opportunity type.

NOTE: The sales process based on opportunity type overrides the defaulted sales process based on a user's role. In other words, when an employee creates an opportunity, her role's default sales process is assigned to the opportunity. If she then selects an opportunity type that has an assigned sales process, the sales process for the opportunity is then driven based on the opportunity type she selected.

About Sales Stage Categories

You can also set up sales stage categories, such as Stage 1, 2, or 3, which you can link to specific sales stages across different sales processes. When you need to consolidate information from different processes, you can run reports against the sales stage categories, providing an accurate view of your pipeline across all opportunity types or roles.

About Sales Process Coach

You can also use the Sales Process Coach to guide your team through completing the necessary information accurately at each sales stage. The Sales Process Coach provides specific steps for employees to follow as well as useful information, such as documents, templates, and competitive information. You can also enforce the collection of information based on how opportunities progress through the sales cycle. In addition, when an opportunity record is saved, you can specify that certain tasks are automatically created, which appear in your employee's task list.

As part of the sales process coach, you can:

- Add information for each sales stage that employees access through the Coach button
- Set up requirements for each sales stage, such as fields to be filled in. These serve as prerequisites before saving the opportunity at a new stage.
- Set up automated tasks that are generated when employees save their opportunities with different sales stages

If you change any Sales Stage names after the system has been deployed, all previous records maintain their assigned Sales Stage until you manually update them.

NOTE: To change the default picklist values for the Probability % field, you need to edit that field from the Opportunity Field Setup page (see [Changing Picklist Values](#) (on page 1054)).

When setting up your sales methodology, follow this general process:

- 1 Set up the sales stage categories (if you have more than one sales process).
- 2 Set up the sales process (or processes).
- 3 Set up the sales stages for each sales process.
- 4 Set up the coaching feature for the sales stages.

Before you begin:

- To perform this procedure, your role must include the Sales Stage Definition privilege.
- If you want to assign a sales process based on the Opportunity Type field, make sure the picklist values are the ones you want to use. The default Opportunity Type values are Renewal and New Business. For instructions on customizing picklist values, see [Changing Picklist Values](#) (on page 1054).

Also, make sure that the Opportunity Type field appears in the page layout for each role you want to use it with. For instructions, see [Customizing Static Page Layouts](#) (on page 1057).

To set up a sales stage category (optional)

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Sales Methodology section, click the Sales Categories link.
- 4 From the Translation Language list, select your company's primary language.
- 5 On the Sales Stage Categories page, click New to create a new sales stage category, or select Edit from the record-level menu for the sales stage category you want to edit.
- 6 On the Edit Sales Stage Category page or the New Sales Stage Category page, complete the required information.

Field	Description
Stage Category	The name of the sales stage category.
Order	The sequence of the sales stage categories as they appear in Oracle CRM On Demand Answers.

Field	Description
Mark for Translation	<p>(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.</p> <p>When you add a new sales stage category name, the Mark for Translation check box is read-only. New names that you add automatically appear (without brackets and in black text) in the other activated languages.</p> <p>If you select the Mark for Translation check box when you update the name of a sales stage category, the updated name appears in the picklists for the other activated languages (in blue text with brackets) until you manually enter the translated versions. The blue text helps you to track which terms must be translated.</p> <p>If you do not select the Mark for Translation check box, the updated name does not appear in the other languages, and the other languages are not affected by the changes that you make on this page.</p>

- 7 Save the record.
- 8 To manually enter the translated equivalent of the new sales stage category:
 - a From the Translation Language list, select the language.
 - b Click the Edit link for the sales stage category.
 - c Enter the translated equivalent in the Stage Category field, and click Save.

To set up a sales process

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Sales Methodology section, click the Sales Processes link.
- 4 From the Translation Language list, select your company's primary language.
- 5 On the Sales Process List page, click New to create a new sales process or select Edit from the record-level menu for the sales process you want to edit.
- 6 On the Sales Process Edit page, complete the required information.

Field	Description
Default Sales Process	Company's default sales process. If no other sales process is assigned to your user role or to the opportunity type for the record, this sales process is used.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company,

Field	Description
	select the Mark for Translation check box.

7 Click Save.

8 To link the sales process to an Opportunity Type field value:

- a** On the Sales Process List page, click the Sales Process Name you want to link.
- b** In the Associated Opportunity Types title bar, click Add.
- c** Select the Opportunity Type, and click Save.

NOTE: You can link only one sales process to each opportunity type. After you do that, the opportunity type value is removed from the picklist for selection with other sales processes. This prevents you from linking more than one sales process to an opportunity type.

When employees have records with the Opportunity Type field corresponding to the value you selected, they see the sales stages for this sales process.

9 To manually enter the translated equivalent of the new sales process:

- a** Go back to the Sales Process List page.
- b** From the Translation Language list, select the language.
- c** Click the Edit link for the sales process.
- d** Enter the translated equivalent in the Sales Process field and click Save.

10 To select the sales process to use as the default:

- a** On the Sales Process List page, click the Sales Process Name link of the sales process you want to set as the default.
- b** Click Edit.
- c** Select the Default Sales Process check box.
- d** Save the record.

NOTE: This sales process is displayed for records or roles that have no other linked sales process.

To set up sales stages for a sales process

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.
- 3** In the Sales Methodology section, click the Sales Processes link.

- 4 On the Sales Process List page, click the Sales Process Name link.
- 5 To set up a sales stage:
 - a In the Sales Stage title bar, click New to create a new sales stage, or select Edit in the record-level menu of the sales stage you want to edit.
 - b On the Sales Stage Edit page, complete the required information.

Field	Description
Default Probability	<p>A percentage that reflects the confidence that the deal will close with the specified revenue on the specified close date. By default, the probability on an opportunity adjusts automatically based on the sales stage of the opportunity. Users can manually override this value, but when a user selects a new sales stage on the opportunity, the value in the Probability percentage field on the opportunity is automatically updated to the default probability value for the new sales stage.</p> <p>NOTE: If the Mass Update feature is used to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage.</p> <p>Important: Do not set up any other Sales Stages with probabilities equal to 0 or 100 percent except Closed/Lost and Closed/Won. Modifying picklists that are used internally by the Oracle CRM On Demand application can have an adverse impact on standard functionality.</p>
Order	Sequence of the Sales Stages as they appear in the picklist. If you add a Sales Stage, you need to change the order value for all subsequent Sales Stages. This way, you can be sure that the Sales Stage drop-down list in the Opportunity pages has the information in the correct order.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.
Stage Category	The name of the sales stage category that this sales stage falls under.

- 1 Save the record.
- 2 To manually enter the translated equivalent of the new sales stage:
 - a On the Sales Process Detail page, in the Sales Stage section, click Show Full List.
 - b In the Sales Stage page, in the Translation Language field, select the language.
 - c Click the Edit link for the sales stage.
 - d Enter the translated equivalent in the Sales Stage Name field and click Save.
- 3 Save the record.

To set up the coaching feature for the sales stages

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.
- 3** In the Sales Methodology section, click the Sales Processes link.
- 4** From the Translation Language list, select your company's primary language.
If you do not select your company's primary language, the Mark for Translation check box does not appear, and the application does not indicate untranslated terms you add here.
- 5** On the Sales Stage List page, click the sales stage link (in the Sales Stage column) you want to set up the coaching information for.
- 6** To make a field required for this sales stage:
 - a** In the Additional Required Fields title bar, click New.
 - b** On the Edit Additional Required Field page, select the field from the list.
 - c** Review the tips for entering default values that appear onscreen, and then enter the value you want to have as the default (optional).
When you enter a default value, the default value is added to the record only if that field is blank. For example, if the record already has a Revenue value, specifying a default value for Revenue here will not cause the revenue amount already saved in the record to be overwritten.
 - d** Save the record.
- 7** To add guidelines for the sales stage for your employees to review, such as objectives and milestones to be achieved in the stage:
 - a** In the Process Coach Steps title bar, click New.
 - b** On the Process Coach Step Edit page, enter a number to indicate the sequence for this information to appear.
When employees click the Coach button from their opportunity records, they can see the first 10 substeps. If you add more than 10, employees can view the entire list by clicking the Show Full List link.
 - c** To mark the information for translation, select the Mark for Translation check box.
 - d** Save the record.
When employees click the Coach button from their opportunity records for an opportunity record with this sales stage, this information appears on their Sales Process Coach page.
- 8** To add an attachment or URL for employees to access resources appropriate to the sales stage:
 - a** In the Useful Resources title bar, click Add Attachment or Add URL.

b On the Attachment Edit or URL Edit page, enter the information.

c Save the record.

When employees click the Coach button from their opportunity records, the list of attachments or URLs linked to this sales stage appears on their Sales Process Coach page.

9 To define tasks that are automatically created when employees update the sales stage:

a In the Automated Tasks title bar, click New.

b On the Automated Tasks Edit page, enter the information.

The information you set up here serves as a template for each task. The newly-created task is linked to this opportunity, so it appears on the Opportunity Detail page as well as the appropriate activity lists.

NOTE: You must enter a number in the Due Date field to indicate how many days after the task is created that the task is due. For example, if the task is created on December 6 and you entered 10 here as the Due Date, the task appears on the employee's task lists as due on December 16.

For Owner, the following behavior applies:

- The task is created for every user having the role you select.
- If no user fulfills the account team role, the task is assigned to the opportunity owner.

c Save the record.

Customizing Your Company's Industry List

Industry is a picklist field on account records. It is used to track the business type of the account. You can add and remove industries, or change the display name of industries on the list. This allows you to adjust the industry picklist to match the nomenclature familiar to your company.

NOTE: The number of industries that you can add to the list is not limited.

To customize your company's industry list

1 In the upper right corner of any page, click the Admin global link.

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Industry Definition section, click the Industry Definition link.

4 From the Translation Language drop-down list, select your company's primary language.

If you do not select your company's primary language, the Mark for Translation check box does not appear, and the application does not indicate untranslated terms you add here.

5 On the Industry Edit page, fill in the information.

NOTE: The Industry SIC Code is one of the fields on the Industry Edit page. The Standard Industrial Classification (SIC) system is a series of numeric codes that classify all businesses by the types of products or services they make available. Businesses engaged in the same activity, whatever their size or type of ownership, are assigned the same SIC code. The SIC codes were developed to facilitate the collection, tabulation, and analysis of data, and to promote comparability in statistical analyses.

- 6 To manually enter the translated equivalent of the new industry:
 - a From the Translation Language drop-down list, select the language.
 - b Enter the translated equivalent in the Display Name field and click Save.
- 7 Save the record.

Data Management Tools

From the Data Management Tools section of the Admin Homepage, you can perform the following tasks:

- Import and export your company data. For more information, see [Import and Export Tools](#) (on page 1282).
- View batch delete requests. For more information, see [Batch Delete Queue Page](#) (on page 1463).
- View batch book assignment requests. For more information, see [Batch Assign Book Queue Page](#) (on page 1464).
- Create and administer the integration event queues. For more information, see [About Integration Events](#) (on page 1464).

Import and Export Tools

Several utilities are available from the Import and Export Tools page, which augment the import and export facilities in Oracle CRM On Demand:

- **Import Assistant.** For more information, see [Import Assistant](#) (on page 1447).
- **Oracle Data Loader On Demand.** For more information, see [Oracle Data Loader On Demand Client Utility](#) (on page 1457).
- **Oracle Migration Tool On Demand.** For more information, see [Oracle Migration Tool On Demand Client Utility](#) (on page 1462).
- **Oracle Web Services.** For more information, see [Web Services Integration](#) (on page 1457).

For more information about choosing an appropriate import method, see 1089184.1 (Article ID) on My Oracle Support.

The import process consists of these steps:

- [Preparing for Data Importing](#) (on page 1324)
- [Importing Your Data](#) (on page 1448)
- [Reviewing Import Results](#) (on page 1452)

You can also export data from Oracle CRM On Demand to CSV files. For information about exporting, click a topic:

- [Exporting Your Data](#) (on page 1454)
- [Reviewing Export Results](#) (on page 1456)

Before you begin:

- To import data, your role must include either the Administration Import privilege or the Marketing Import privilege. The Administration Import privilege lets you import all record types, whereas the Marketing Import privilege lets you import only accounts, contacts, and leads.
- If a user wants to import up to 2000 contacts, you must enable the Personal Import privilege for the user's role. The Personal Import privilege provides greater control over a user's data imports. For more information on roles, see [Adding Roles](#) (on page 1173).
- Review this entire section as well as the tutorial lessons on importing records, which provide additional information for performing imports (best practices).

CAUTION: You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5-10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on data importing or contact Customer Care. For information on those resources, click the Training and Support link at the top of each page within Oracle CRM On Demand.

- To export data, your role must include the Administration Export privilege.

You can import data from comma-separated value (CSV) files to automatically create records in Oracle CRM On Demand. Each CSV file must be less than 20 MB in size. To reduce the file size, either divide the records into several files, or reduce the data by deleting the columns that you do not want to import. You can view a sample CSV file in Oracle Data Loader On Demand Guide.

This table describes what types of records you can create by importing data and how many records you can import each time that you run the import process.

Record Type	Record Limit for Each Import
Account	30000
Account Team	50000
Appointment	30000
Appointment Contact	50000
Appointment User	50000
Asset	80000
Contact (Admin)	30000
Contact Team	50000
Campaign	50000
Campaign Recipient	50000

Record Type	Record Limit for Each Import
Deal Registrations	30000
Lead	30000
Note	50000
Opportunity	30000
Opportunity Contact Role	50000
Opportunity Product	80000
Product	80000
Product Category	30000
Property	30000
Solution	50000
Service Request	30000
Task	30000
Task Contact	50000
Task User	50000
User	500
Vehicle Contact	50000

Depending on the industry-specific solutions you have implemented, the following records can be made available to import:

Record Type	Record Limit for Each Import
Allocation	30000
Application	30000
Business Plan	30000
Claim	30000
Contact State License	30000
Coverage	30000
Custom Objects	30000
Damage	30000
Dealer	80000
Deal Registration	30000

Record Type	Record Limit for Each Import
Financial Account	30000
Financial Account Holder	30000
Financial Account Holding	30000
Financial Plan	30000
Financial Product	30000
Financial Transaction	30000
Inventory Audit Report	30000
Inventory Period	30000
Involved Party	30000
Insurance Property	30000
MDF Request	30000
Messaging Plan	30000
Messaging Plan Item	30000
Messaging Plan Item Relation	30000
Message Response	30000
Objective	30000
Partner	30000
Plan Account	30000
Plan Contact	30000
Plan Opportunity	30000
Policy	30000
Policy Holder	30000
Portfolio	30000
Price List	30000
Price List Line Item	30000
Sample Disclaimer	30000
Sample Inventory	30000
Sample Lot	30000
Sample Transaction	30000

Record Type	Record Limit for Each Import
Signature	30000
Special Pricing Product	30000
Special Pricing Request	30000
Transaction Item	30000
Vehicle	80000

About Countries and Address Mapping

The following table shows:

- Picklist values for the Country field in Oracle CRM On Demand

The picklist values for the Country field in Oracle CRM On Demand cannot be edited. To capture all the data when importing your files, make sure your countries match the permissible names exactly, including punctuation and capitalization. Otherwise, the information is not imported.

NOTE: Because the Country picklist values have a 30-character limit, some names that exceed that limit are truncated in the picklist.

- Mappings for addresses per country

When importing your data, you need to set up columns for each of the nine address fields that Oracle CRM On Demand uses. The following table shows how you want to map the address fields for each country to the appropriate fields within Oracle CRM On Demand. Mapping correctly ensures that you capture all the data in your files under the correct fields in the application.

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/Sorting
USA	8	Number/ Street	Address 2	Address 3	City	County	US State	Zip		
Afghanistan	6	Address 1	Address 2		City			Post Code	Province	
Albania	6	Address 1	Address 2		City			Post Code	Province	
Algeria	5	Number/ Street	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
American Samoa	6	Address 1	Address 2		City			Post Code	Province	
Andorra	5	Number/ Street	Address 2		City			Post Code		
Angola	4	Street/ Number	Address 2		City					
Anguilla	6	Address 1	Address 2		City			Post Code	Province	
Antigua and Barbuda	4				City				Island	PO Box
Argentina	5	Number/ Street	Address 2		City			Post Code	Province	
Armenia	5	Street/ Number	Address 2		City			Post Code		
Aruba	5	Number/ Street	Address 2	Floor	City					
Ascension Island	5	Address 1	Address 2		City			Post Code	Province	
Australia	6	Number/ Street	Address 2		City			Zip	State	
Austria	5	Street/ Number	Address 2		City			Post Code		
Azerbaijan	5	Street/ Number	Address 2		City			Post Code		
Bahamas	6	Address 1	Address 2		City			Island Code	Island	
Bahrain	5	Number/ Street	Address 2		City			Post Code		
Bangladesh	5	Street/ Number	Address 2		City			Post Code		
Barbados	6	Address 1	Address 2		City			Post Code	Province	
Belarus	6	Street/ Number	Address 2		City			Post Code		Sorting C
Belgium	6	Street/ Number	Address 2		City			Post Code		Sorting C

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Belize	5	Number/ Street	Address 2	Floor	City					
Benin	4				City			Boite Postale		Sorting C
Bermuda	5	Number/S treet	Address 2		City			Post Code		
Bhutan	6	Address 1	Address 2		City			Post Code	Province	
Bolivia	4	Street/ Number	Address 2		City					
Bosnia and Herzegovina	5	Street/ Number	Address 2		City			Post Code		
Botswana	3				City					PO Box
Bouvet Island	6	Address 1	Address 2		City			Post Code	Province	
Brazil	7	Street/ Number	Address 2	Floor	City			Post Code	Province	
British Indian Ocean Territory	6	Address 1	Address 2		City			Post Code	Province	
Brunei Darussalam	5	Number/ Street	Address 2		City			Post Code		
Bulgaria	5	Street/ Number	Address 2		City			Post Code		
Burkina Faso	4				City			Boite Postale		Sorting C
Burundi	3				City					PO Box
Cambodia	6	Address 1	Address 2		City			Post Code	Province	
Cameroon	3				City					PO Box
Canada	6	Number/ Street	Address 2		City			Post Code	Province	
Cape Verde	4	Street/ Number	Address 2		City					
Cayman Island	6	Address 1	Address 2		City			Post Code	Province	
Central African	3				City					PO Box

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Republic										
Chad	3				City					PO Box
Channel Islands	5	Address 1	Address 2		City			Post Code	Province	
Chile	6	Street/ Number	Address 2	Floor	City			Post Code	Province	
China	5	Number/ Street	Address 2		City			Post Code		
Christmas Island	6	Address 1	Address 2		City			Post Code	Province	
Cocos (Keeling) Islands	6	Address 1	Address 2		City			Post Code	Province	
Colombia	7	Street/ Number	Address 2	Floor	City				Province	Sorting C
Comoros	3				City					PO Box
Congo	3	Street/ Number			City					
Congo, The Democratic Republic	4				City			Boite Postale		Sorting C
Cook Islands	6	Address 1	Address 2		City			Post Code	Province	
Costa Rica	6	Street/ Number	Address 2	Floor	City			Post Code		
Croatia	4	Street/ Number	Address 2		City			Post Code		
Cuba	4	Street/ Number			City			Codiga Postal		
Curacao	5	Address 1	Address 2		City			Post Code	Province	
Cyprus	5	Number/ Street	Address 2		City			Post Code		
Czech Republic	6	Street/ Number	Address 2		City			Post Code		Sorting C
Denmark	6	Street/ Number	Address 2		City			Post Code		Sorting C

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Djibouti	3				City					PO Box
Dominica	6	Address 1	Address 2		City			Post Code	Province	
Dominican Republic	5	Number/ Street	Address 2		City			Post Code		
East Timor	5	Street/ Number	Address 2		City			Post Code		
Ecuador	5	Address 1		Floor	City			Post Code	Province	
Egypt	6	Address 1		District	City			Post Code	Province	
El Salvador	5	Street/ Number			City			Post Code	Province	
Equatorial Guinea	3				City					PO Box
Eritrea	3	Street/ Number			City					
Estonia	5	Street/ Number	Address 2		City			Post Code		
Ethiopia	3				City					PO Box
Falkland Islands (Malvinas)	3	Street/ Number			City					
Faroe Islands	6	Address 1	Address 2		City			Post Code	Province	
Fiji	5	Number/ Street	Address 2	Floor	City					
Finland	6	Street/ Number	Address 2		City			Post Code		Sorting C
France	5	Number/ Street	Address 2		City			Post Code		
French Guiana	5	Number/ Street	Address 2		City			Post Code		
French Polynesia	5	Number/ Street	Address 2		City			Post Code		
French Southern Territories	5	Number/ Street	Address 2		City			Post Code		
Gabon	3				City					PO Box

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Gambia	3	Street/ Number			City					
Georgia	5	Number/ Street	Address 2		City			Post Code		
Germany	5	Street/ Number	Address 2		City			Post Code		
Ghana	3				City					PO Box
Gibraltar	3	Street/ Number			City					
Greece	5	Street/ Number	Address 2		City			Post Code		
Greenland	5	Street/ Number	Address 2		City			Post Code		
Grenada	6	Address 1	Address 2		City			Post Code	Province	
Guadeloupe	6	Address 1	Address 2		City			Post Code	Province	
Guam	6	Address 1	Address 2		City			Post Code	Province	
Guatemala	4	Street/ Number			City			Codiga Postal		
Guinea	3				City					PO Box
Guinea-bissau	4	Street/ Number			City			Codiga Postal		
Guyana	6	Address 1	Address 2		City			Post Code	Province	
Haiti	6	Street/ Number	Address 2		City			Post Code		Sorting C
Heard and Mc Donald Islands	6	Address 1	Address 2		City			Post Code	Province	
Holy See (Vatican City State)	6	Street/ Number	Address 2		City			Post Code		Sorting C
Honduras	7	Street/ Number	Address 2	Floor	City			Post Code	Province	
Hong Kong	7	Number/ Street	Address 2	District	City				Part of Territory	Address 4

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Hungary	5	Street/ Number	Address 2		City			Post Code		
Iceland	5	Street/ Number	Address 2		City			Post Code		
India	5	Number/ Street	Address 2		City			Post Code		
Indonesia	5	Street/ Number	Address 2		City			Post Code		
Iran (Islamic Republic of)	5	Number/ Street	Address 2		City			Post Code		
Iraq	6	Address 1	Address 2		City			Post Code	Province	
Ireland	6	Number/ Street	Address 2	Address 3	City					County
Israel	5	Number/ Street	Address 2		City			Post Code		
Italy	6	Street/ Number	Address 2		City			Post Code	Province	
Ivory Coast	4				City			Boite Postale		Sorting C
Jamaica	6	Number/ Street	Address 2		City				Parish	Sorting C
Japan	6	Chome	Ku		Chi/ Gun			Post Code	Prefecture	
Jordan	5	Number/ Street	Address 2		City			Post Code		
Kazakhstan	4	Address 1			City			Post Code		
Kenya	4				City			Post Code		PO Box
Kirbati	4	Address 1			City				Island	
Korea	6	Address 1	Address 2		City			Post Code	Province	
Kosovo	6	Street/Nu mber	Address 2	District	City			Post Code		
Korea, Democratic People's Rep	6	Address 1	Address 2		City			Post Code	Province	

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Kuwait	5	Street/ Number	Address 2		City			Post Code		
Kyrgyzstan	6	Street/ Number	Address 2		City			Post Code		Sorting C
Laos	5	Number/ Street	2		City			Post Code	Province	
Latvia	5	Street/ Number			City			Post Code		Sorting C
Lebanon	6	Address 1	Address 2		City			Post Code	Province	
Lesotho	3				City					PO Box
Liberia	6	Street/ Number	Address 2		City			Post Code		Sorting C
Libyan Arab Jamahiriya	6	Address 1	Address 2		City			Post Code	Province	
Liechtenstein	5	Street/ Number	Address 2		City			Post Code		
Lithuania	4	Street/ Number			City			Codigo Postal		
Luxembourg	5	Number/ Street	Address 2		City			Post Code		
Macau	6	Address 1	Address 2		City			Post Code	Province	
Macedonia, The Former Yugoslav	6	Street/ Number	Address 2		City			Post Code		Sorting C
Madagascar	5	Street/ Number	Address 2		City			Post Code		
Malawi	3				City					PO Box
Malaysia	5	Number/ Street	Address 2		City			Post Code		
Maldives	5	Number/ Street	Address 2		City			Post Code		
Mali	5	Number/ Street	Address 2	Floor	City					
Malta	6	Number/ Street	Address 2		City			Post Code	Island	

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Marshall Islands	6	Number/ Street	Address 2		City			Zip	State	
Martinique	5	Number/ Street	Address 2		City			Post Code		
Mauritania	3				City					PO Box
Mauritius	3	Street/ Number			City					
Mayotte	5	Number/ Street	Address 2		City			Post Code		
Mexico	8	Street/ Number	Address 2	Floor	City			Post Code	State	Colonia/S n
Micronesia, Federated States of	6	Address 1	Address 2		City			Post Code	Province	
Moldova, Republic of	5	Street/ Number	Address 2		City			Post Code		
Monaco	5	Number/ Street	Address 2		City			Post Code		
Mongolia	5	Street/ Number	Address 2		City			Post Code		
Montenegro	5	Address 1	Address2		City			Post Code	Province	
Montserrat	6	Address 1	Address 2		City			Post Code	Province	
Morocco	5	Number/ Street	Address 2		City			Post Code		
Mozambique	4	Street/ Number			City			Codigo Postal		
Myanmar	5	Address 1			City			Post Code		Township
Namibia	3				City					PO Box
Nauru	3			District						PO Box
Nepal	5	Street/ Number	Address 2		City			Post Code		
Netherlands	5	Street/ Number	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Netherlands Antilles	5	Address 1	Address 2		City				Island	
New Caledonia	5	Number/ Street	Address 2		City			Post Code		
New Zealand	5	Number/ Street	Address 2		City			Post Code		
Nicaragua	5	Street/ Number	Address 2		City			Post Code		
Niger	3				City					PO Box
Nigeria	6	Address 1	Address 2		City			Post Code	Province	
Niue	3				City					PO Box
Norfolk Island	6	Number/ Street	Address 2		City			Zip	State	
Northern Mariana Islands	6	Number/ Street	Address 2		City			Zip	State	
Norway	6	Street/ Number	Address 2		City			Post Code		Sorting C
Oman	4							Post Code	Region	PO Box
Pakistan	6	Number/ Street	Address 2	Address 3	City			Post Code		
Palau	6	Number/ Street	Address 2		City			Zip	State	
Palestinian Authority	6	Address 1	Address 2		City			Post Code	Province	
Panama	5	Address 1			City				Province	Sorting C
Papua New Guinea	3				City				Province	
Paraguay	4	Street/ Number	Address 2		City					
Peru	5	Street/ Number	Address 2		City					Sorting C
Philippines	7	Street/ Number	Address 2	District	City			Post Code	Province	

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Pitcairn	1									
Poland	4	Street/ Number			City			Codigo Postal		
Portugal	6	Street/ Number	Address 2	Floor	City			Post Code		
Puerto Rico	5	Address 1			City			Post Code		URB
Qatar	3				City					PO Box
Reunion	5	Number/ Street	Address 2		City			Post Code		
Romania	5	Street/ Number	Address 2		City			Post Code		
Russian Federation	6	Street/ Number	Address 2		City			Post Code		Sorting C
Rwanda	3				City					PO Box
Samoa	5	Number/ Street	Address 2		City			Zip	State	
San Marino	6	Street/ Number	Address 2		City			Post Code		Sorting C
Sao Tome and Principe	5	Number/ Street	Address 2	Floor	City					
Saudi Arabia	5	Number/ Street	Address 2		City			Post Code		
Senegal	3	Street/ Number			City					
Serbia	6	Address 1	Address 2		City			Post Code	Province	
Seychelles	4				City				Island	PO Box
Sierra Leone	5	Number/ Street	Address 2	Floor	City					
Singapore	5	Street/ Number	Address 2		City			Post Code		
Slovakia (Slovak Republic)	6	Street/ Number	Address 2		City			Post Code		Sorting C

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Slovenia	5	Street/ Number	Address 2		City			Post Code		
Solomon Islands	5				City			Island Code	Island	PO Box
Somalia	6	Address 1	Address 2		City			Post Code	Province	
South Africa	5	Number/ Street	Address 2		City			Post Code		
South Georgia and the Sandwich Isles	6	Address 1	Address 2		City			Post Code	Province	
Spain	7	Street/ Number	Address 2	Floor	City			Post Code	Province	
Sri Lanka	5	Number/ Street	Address 2		City			Post Code		
St. Barts	5	Number/ Street	Address 2		City			Post Code		
St. Helena	6	Address 1	Address 2		City			Post Code	Province	
St. Kitts and Nevis	5	Address 1	Address 2		City				Island	
St. Lucia	5	Number/ Street	Address 2	Floor	City					
St. Martin	5	Number/ Street	Address 2		City			Post Code		
St. Pierre and Miquelon	5	Number/ Street	Address 2		City			Post Code		
St. Vincent and the Grenadines	4	Number/ Street	Address 2	Floor	City					
Sudan	4				City			Post Code		PO Box
Suriname	3	Street/ Number			City					
Svalbard and Jan Mayen Islands	6	Address 1	Address 2		City			Post Code	Province	
Swaziland	4				City			Post Code		PO Box
Sweden	5	Street/	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
		Number								
Switzerland	5	Street/ Number	Address 2		City			Post Code		
Syrian Arab Republic	3	Street/ Number			City					
Taiwan	5	Number/ Street	Address 2		City			Post Code		
Tajikistan	5	Street/ Number	Address 2		City			Post Code		
Tanzania, United Republic of	3				City					PO Box
Thailand	7	Address 1	Address 2	Address 3	City			Post Code	Province	
Togo	3				City					PO Box
Tokelau	6	Address 1	Address 2		City			Post Code	Province	
Tonga	4				City				Island	PO Box
Trinidad and Tobago	5	Number/ Street	Address 2	Floor	City					
Tunisia	5	Street/ Number	Address 2		City			Post Code		
Turkey	5	Street/ Number	Address 2		City			Post Code		
Turkmenistan	4	Number/ Street			City			Post Code		
Turks and Caicos Islands	6	Address 1	Address 2		City			Post Code	Province	
Tuvalu	4				City				Island	PO Box
Uganda	3				City					PO Box
Ukraine	5	Address 1	Address 2		City			Post Code		
United Arab Emirates	3								Emirate	PO Box
United Kingdom	7	Number/ Street	Address 2		City			Post Code		County

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/Sorting
United States Minor Outlying I	6	Address 1	Address 2		City			Post Code	Province	
Uruguay	5	Number/ Street	Address 2		City			Post Code		
Uzbekistan	6	Address 1	Address 2		City			Post Code	Oblast	
Vanuatu	3				City					PO Box
Venezuela	6	Street/ Number	Address 2		City			Post Code	Province	
Vietnam	5	Number/ Street	Address 2		City			Post Code		
Virgin Islands (British)	6	Address 1	Address 2		City			Post Code	Province	
Virgin Islands (U.S.)	6	Number/ Street	Address 2		City			Zip	State	
Wallis and Futuna Islands	6	Address 1	Address 2		City			Post Code	Province	
Western Sahara	5	Number/ Street	Address 2		City			Post Code		
Yemen	3	Street/ Number			City					
Zambia	5	Number/ Street	Address 2		City			Post Code		
Zimbabwe	5	Number/ Street	Address 2	Floor	City					

Valid State/Territory Abbreviations for USA

This table shows the picklist values for USA.

Abbreviations	Complete Names
AK	Alaska
AL	Alabama
AR	Arkansas

Abbreviations	Complete Names
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida
GA	Georgia
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MI	Michigan
MN	Minnesota
MO	Missouri
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire
NJ	New Jersey
NM	New Mexico

Abbreviations	Complete Names
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming

Valid Mailing Codes for USA

This table shows the three, official state-codes for U.S. military mail recipients.

Abbreviations	Description
AE (ZIP codes 09xxx)	Armed Forces Europe. This term includes Canada, Middle East, and Africa.
AK (ZIP codes 962xx - 966xx)	Armed Forces Pacific.
AA (ZIP codes 340xx)	Armed Forces Americas. This term includes Central and South America.

Valid Province/Territory Abbreviations for Canada

This table shows the official abbreviations for Canadian provinces (text fields).

Abbreviations	Complete Names
AB	Alberta
BC	British Columbia
MB	Manitoba
NB	New Brunswick
NF	Newfoundland and Labrador
NS	Nova Scotia
NT	Northwest Territories
NU	Nunavut
ON	Ontario
PE	Prince Edward Island
QC	Quebec
SK	Saskatchewan
YT	Yukon

About Record Duplicates and External IDs

When you import records, you can choose to handle duplicate records in these ways:

- By not importing the duplicate ones
- By overwriting the existing ones

NOTE: The overwriting option is not available when you import Tasks, Appointments, and Notes. New records are always created for these record types.

- By creating additional records for the duplicates (Contacts and Leads only)

If you choose to overwrite existing records when you import your data, Oracle CRM On Demand checks whether the record in your import file is a duplicate of an existing record in Oracle CRM On Demand by checking the values in the fields that are used to check for duplicate records. If your record is a duplicate, Oracle CRM On Demand updates the fields on the existing record in Oracle CRM On Demand with the values from the record that you import, with the exception of the fields that are used to check for duplicate records.

On many record types, you can use either the External ID field or a predefined set of fields to check if the record in your import file is a duplicate of an existing record in Oracle CRM On Demand. If you use the External ID as the field to check for duplicate records, then when a duplicate record is found, all of the fields on the record in Oracle CRM On Demand are updated, with the exception of the External ID field. Similarly, if

you use the predefined set of fields to check for duplicate records, all fields other than the duplicate-checking fields are updated on the record in Oracle CRM On Demand.

For example, on the Account record type, you can use the External ID field, or a combination of the Account Name and Location fields to check for duplicate records. If the record in your file is a duplicate record, the existing record in Oracle CRM On Demand is updated with the data from your import file as follows:

- If you used the External ID field to check for duplicates, all fields other than the External ID field are updated on the record in Oracle CRM On Demand.
- If you used the Account Name and Location fields to check for duplicate records, all fields other than the Account Name and Location fields are updated on the record in Oracle CRM On Demand.

To update records

- 1 Set up your import CSV file with a column for the External ID codes, or for all of the duplicate checking fields for the record type.
- 2 Make sure that the External ID codes or the duplicate checking field values are exactly the same as the values for the existing records. If you are using External ID codes, each one must be unique in the system for the update to work.
- 3 Include at least all required fields in your import CSV file.
- 4 Select the Overwrite Existing Records option in Step 1 of the import assistant.
- 5 Make sure that you map the External ID field or all of the duplicate checking fields in the Field Mapping step of the import assistant.
- 6 Complete all of the import assistant steps to import the data.

When you use the import assistant to update records, only fields that you map in the Field Mapping step are overwritten. Therefore, if you have fields that do not need to be updated, and they are not required for duplicate checking, you do not have to map those fields.

If External IDs exist and you have mapped them during the import process, the application uses them to determine if a record is a duplicate. When importing other record types, you can use those External IDs as references so that the associations are carried over to Oracle CRM On Demand.

For example, if you have an `account_id` column in your `account.csv` file, you want to map it to the External Unique ID. When importing contacts, if your `contacts.csv` file contains a `contact_id` column (the unique ID for the contact) and an `account_id` column (a reference to the IDs in the `account.csv` file), you should map the `contact_id` to External Unique ID and `account_id` to Account External ID. During the import process, the application checks the `account_id` field in each contact record to determine the existing account and link the account to the contact.

If no External IDs exist or you do not map External IDs in your file to the External ID fields in the application, the application determines duplicates by comparing certain fields. The following table lists the fields that are used to determine record duplicates.

Records of This Type	Are Duplicates If These Fields Match
----------------------	--------------------------------------

Records of This Type	Are Duplicates If These Fields Match
User	<ul style="list-style-type: none"> ■ User ID OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Account	<ul style="list-style-type: none"> ■ Account Name and Location OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Account Team	Account (Account Name or Account External ID) and User (User ID)
Contact	<ul style="list-style-type: none"> ■ First Name, Last Name, Work Phone #, and Email OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) <p>NOTE: Oracle CRM On Demand does not check for duplicate records when contacts are created through the user interface.</p>
Contact Team	Contact (Contact Name or Contact External ID) and User (User ID)
Product Category	<ul style="list-style-type: none"> ■ Category Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Product	<ul style="list-style-type: none"> ■ Product Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Opportunity	<ul style="list-style-type: none"> ■ Opportunity Name and Account (Account Name or Account External ID)

Records of This Type	Are Duplicates If These Fields Match
	<p>OR</p> <ul style="list-style-type: none"> ■ External ID (Created by another software system) <p>OR</p> <ul style="list-style-type: none"> ■ Row ID (Oracle CRM On Demand internal ID)
Opportunity Contact Role	Opportunity Name and Contact Full Name
Opportunity Product Revenue	<p>External ID (Created by another software system)</p> <p>NOTE: Oracle CRM On Demand does not check for duplicate records when opportunity product revenue records are created through the user interface.</p>
Campaign	<ul style="list-style-type: none"> ■ Source Code <p>OR</p> <ul style="list-style-type: none"> ■ External ID (Created by another software system) <p>OR</p> <ul style="list-style-type: none"> ■ Row ID (Oracle CRM On Demand internal ID)
Campaign Recipient	<p>Campaign (Campaign External ID or Campaign ID), Contact (Contact Full Name or Contact External ID), Source Code</p> <p>NOTE: You must provide either Contact Full Name or Contact External ID, but not both.</p>
Lead	<ul style="list-style-type: none"> ■ First Name, Last Name, Company, Primary Phone #, and Email <p>OR</p> <ul style="list-style-type: none"> ■ External ID (Created by another software system) <p>OR</p> <ul style="list-style-type: none"> ■ Row ID (Oracle CRM On Demand internal ID) <p>NOTE: Oracle CRM On Demand does not check for duplicate records when leads are created through the user interface.</p>
Service Request	<ul style="list-style-type: none"> ■ SR Number <p>OR</p> <ul style="list-style-type: none"> ■ External ID (Created by another software system) <p>OR</p> <ul style="list-style-type: none"> ■ Row ID (Oracle CRM On Demand internal ID)
Solution	<ul style="list-style-type: none"> ■ Title <p>OR</p> <ul style="list-style-type: none"> ■ External ID (Created by another software system)

Records of This Type	Are Duplicates If These Fields Match
	OR ■ Row ID (Oracle CRM On Demand internal ID)
Task	No duplicate checking (Always creates new records)
Task Contact	Task External ID, Contact (Contact External ID or Contact Full Name)
Task User	Task External ID, User (User Sign In ID or User External ID)
Appointment	No duplicate checking (Always creates new records)
Appointment Contact	Appointment External ID, Contact (Contact External ID or Contact Full Name)
Appointment User	Appointment External ID, User (User Sign In ID or User External ID)
Note	No duplicate checking (Always creates new records)
Asset	External ID (Created by another software system)
Custom Objects 01, 02, 03	External ID (Created by another software system) NOTE: Oracle CRM On Demand does not check for duplicate records when custom object records are created through the user interface.
Custom Objects 04 and higher	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) NOTE: Oracle CRM On Demand does not check for duplicate records when custom object records are created through the user interface.
Portfolio	■ Account Number and Product OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Dealer	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Vehicle	<ul style="list-style-type: none"> ■ VIN OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Vehicle Contact	Vehicle and Contact
Financial Account	<ul style="list-style-type: none"> ■ Financial Account OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Account Holding	<ul style="list-style-type: none"> ■ Financial Account Holdings Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Plan	<ul style="list-style-type: none"> ■ Financial Plan Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Account Holder	<ul style="list-style-type: none"> ■ Financial Account Holder Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Insurance Property	<ul style="list-style-type: none"> ■ Type OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Financial Transaction	<ul style="list-style-type: none"> ■ Transaction ID OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Product	<ul style="list-style-type: none"> ■ Financial Product Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Coverage	<ul style="list-style-type: none"> ■ Coverage Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Claim	<ul style="list-style-type: none"> ■ Claim Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Policy	<ul style="list-style-type: none"> ■ Policy Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Policy Holder	<ul style="list-style-type: none"> ■ Policy Holder Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Involved Party	<ul style="list-style-type: none"> ■ Involved Party Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Damage	<ul style="list-style-type: none"> ■ Damage Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Partner	<ul style="list-style-type: none"> ■ Partner Name and Location OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Partner Program	<ul style="list-style-type: none"> ■ Partner Program Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Special Pricing Request NOTE: In the import assistant, this record type is shown as SP Request.	<ul style="list-style-type: none"> ■ Request Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Application	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Deal Registration	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Price List	<ul style="list-style-type: none"> ■ Price List Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Allocation	<ul style="list-style-type: none"> ■ User Detail OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Broker Profile	<ul style="list-style-type: none"> ■ Broker Profile Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Accreditation	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Exam Registration	<ul style="list-style-type: none"> ■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
MDF Request	<ul style="list-style-type: none"> ■ Request Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Course	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Exam	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Messaging Plan Item	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Certification	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Course Enrollment	<ul style="list-style-type: none"> ■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Sample Inventory	<ul style="list-style-type: none"> ■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Inventory Period	<ul style="list-style-type: none"> ■ Start Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Plan Account	<ul style="list-style-type: none"> ■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Objective	<ul style="list-style-type: none"> ■ Objective Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Certification Request	<ul style="list-style-type: none"> ■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Lot	<ul style="list-style-type: none"> ■ Lot # OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Transaction Item	<ul style="list-style-type: none"> ■ Sample OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Transaction	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Contact State License	<ul style="list-style-type: none"> ■ License Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Business Plan	<ul style="list-style-type: none"> ■ Plan Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Inventory Audit Report	<ul style="list-style-type: none"> ■ Reported Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Special Pricing Product	<ul style="list-style-type: none"> ■ Item Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) <p>NOTE: Oracle CRM On Demand does not check for duplicate records when special pricing product records are created through the user interface.</p>
Plan Opportunity	<ul style="list-style-type: none"> ■ Opportunity OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Disclaimer	<ul style="list-style-type: none"> ■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Accreditation Request	<ul style="list-style-type: none"> ■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Messaging Plan Item Relations	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Messaging Plan	<ul style="list-style-type: none"> ■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Plan Contact	<ul style="list-style-type: none"> ■ Contact Full Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Price List Line Item	<ul style="list-style-type: none"> ■ LineItem OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

CAUTION: When updating files, it is recommended that you map either the External ID or the other set of fields for determining duplicates; if you map both of them, you risk overwriting fields used for duplicate checking that you might not want to overwrite. For example, if you map the External ID, Account Name, and Location when updating account records, and a duplicate is found based on the External ID, the Account Name and Location overwrite the existing values in the database. If no duplicates are found based on the External ID, the system checks for duplicates based on Account Name and Location, and if found, overwrites the External ID in the database.

Account Import and External ID Summary

When importing accounts, you specify how you want the application to handle duplicate records:

- **Don't Import Duplicate Records**

If duplicates are found, the duplicate record is not imported.

- **Overwrite Existing Records**

If duplicates are found, the existing record is updated. If more than one duplicate is found, then no records are inserted or updated.

After selecting the behavior, you have the option of mapping fields, including these two external IDs available with account imports:

- **External Unique ID.** Refers to the external ID of the current record to be imported. The External Unique ID is directly involved in duplicate checking, as described in this section.

- **Parent Account External ID.** References the external ID of the parent record for the current record. The behavior surrounding each of these external IDs is independent of each other.

Scenarios for External Unique IDs

Scenario A - External Unique ID is not mapped

Duplicate checking is based on Account Name and Location. If a duplicate is found, the behavior is determined by the selected duplicate checking option.

Scenario B - External Unique ID is mapped

Import first tries to find a duplicate record using the External Unique ID.

- Scenario B1 - Single Duplicate External ID Found

Account Name and Location are checked for duplicates outside of the currently matched record, and if a duplicate is found, no records are updated or inserted.

If the duplicate checking option is set to Overwrite Existing Records, then the record is updated (including Account Name and Location).

If the duplicate checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- Scenario B2 - Multiple Duplicate External IDs Found

No Records are inserted or updated.

- Scenario B3 - No Duplicate External ID Found

Import now checks duplicates based on the Account Name and Location.

- Scenario B3a - No Duplicate Account Name and Location Found.
Record is inserted.

- Scenario B3b - Single Duplicate Account Name and Location Found
If the duplicate checking option is set to Overwrite Existing Records, the record is updated, *including the External Unique ID*. If the duplicate checking option is set to Don't Import Duplicate Records, no records are updated.

- Scenario B3c - Multiple Duplicate Account Name and Locations Found
No records are inserted or updated.

Scenario C - External Unique ID is not Mapped

The Account Name and Location are used to perform duplicate checking.

- Scenario C1 - Single Duplicate Account Name and Location found

If Duplicate Checking option is set to Overwrite Existing Records, then the record is updated.

If Duplicate Checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- Scenario C2 - Multiple Duplicate Account Name and Location found.

No records are updated or inserted.

- Scenario C3 - No Duplicate Account Name and Location found

Record is inserted.

Scenarios for Parent Account External IDs

The Parent Account External ID is only used to set the associated Parent Account Record. It has no impact on duplicate checking or updates.

Scenario A - Parent Account External ID is Mapped

Import uses the Parent Account External ID *only* to determine the Parent Account.

- Scenario A1- Multiple records match Parent Account External ID

Parent Account is not set.

- Scenario A2 - Single Record matches Parent Account External ID

Parent Account is set.

- Scenario A3 - No records match the Parent Account External ID

Parent Account is not set.

Scenario B - Parent Account External ID is not Mapped

Import uses the Parent Account Name and Parent Account Location to determine the Parent Account.

- Scenario B1 - Multiple records match Parent Account Name and Parent Location.

Parent Account is not set.

- Scenario B2 - Single Record matches Parent Account Name and Parent Location

Parent Account is set.

- Scenario B3 - No records match the Parent Account Name and Parent Location

Parent Account is not set.

Linking Records During Import

When you import records, you may want to link them to existing records in the database. For example, you might link a contact record (John Smith) to an account record (Smith Auto Repair).

A record must already exist in the database before you can link another record to it during import. Therefore, when you have more than one type of record to import, it is best to import them in the order in which they appear on the Import and Export Tools page. For example, import account records before you import contact records.

You can link records during import in one of two ways:

- by indicating the name of the linked record or
- by indicating its external ID code.

In either case, you must make sure that your import CSV file includes a column containing the data.

Using the Name to Link Records

To link records by indicating the name, include a column in your import file for the name of the linked record. For example, to import contact records that are linked to accounts:

- add an Account Name column to your import file
- fill in the name of the appropriate account for each contact record
- use the Import Assistant to map the Account Name column to the Account field in the contact record.

NOTE: If a contact record is imported with an associated account that does not yet exist in the database, one can be created during import. The system-created account record will use the contact's address for the account billing and shipping addresses. To enable this feature, select the Create Associated Record option in Step 1 of the Import Assistant.

Using the External ID to Link Records

You can import a unique identifier code into the External ID field for each record in the application. Then, you can use the External ID field to create links between records in subsequent imports.

For example, an exported CSV file of contact records identifies an associated account for each contact. Each account is represented by a numeric code, rather than by a name, in a column called Account Code. When importing these records, first import the account records, mapping the Account Code column in the CSV file to the External ID field in the application. Next, import the contact records, mapping the Account Code column in the CSV file to the Account External ID field in the Oracle CRM On Demand contact record to create a link between the contact and account records.

Data Checking Guidelines

Check the data in your CSV file before importing it into Oracle CRM On Demand:

- 1 Check the guidelines for the field type of the data. See [Field Type Guidelines for Importing Data](#) (on page 1319).
- 2 Check the specific information pertaining to each record type you want to import. .

The drop-down list in the Import and Export Tools page shows the recommended sequence for importing records. The record types in the list depend on the industry-specific solutions you have implemented, however, you must import the record types in the sequence shown in the list.

NOTE: The data checking guidelines use examples relevant to the installations of Oracle CRM On Demand in the U.S and Canada. Other country-specific installations might change the default lists of valid values, so that they differ from the information shown in this topic. For example, the list of valid state or province values will probably be different for installations outside the U.S and Canada. Also, valid values might be different, depending on the languages that are supported.

Oracle CRM On Demand determines the field order in the export CSV file, and can change at any time. Therefore, do not rely on the fields in the export CSV file to be in a specific order. Renaming the iTAG or field name values has no impact on the order of the fields in the export file. If you want more control of field order, consider using Oracle Web services.

Field Type Guidelines for Importing Data

Make sure the data you want to import meets the specifications for its field type. The field types described in this topic are:

- Text
- Picklist
- Number
- Integer
- Currency
- Percent
- Check box
- Email
- Phone
- Date/Time
- Date

Text

Each text field in Oracle CRM On Demand has a maximum length. Excess characters are not imported. The Import Results email message warns you when this situation occurs.

TIP: Compare the length of the data you want to import against the allowed length. (Open the file in a spreadsheet application and use one of the spreadsheet functions to determine the longest value in a column.) When the data exceeds the limit, consider importing it into a custom field, splitting the data into two separate fields, or abbreviating some data so that it fits within the target length.

Picklist

Picklist fields allow a user to select a value from a list of values for the field. During the import process, you can specify either to add new picklist values from your CSV file to the application or not to add them.

NOTE: If the user's language setting is the same as the company-level language setting, they will always see the picklist values option. If the user's language is different from the company's language setting, they don't see that option. For example, if the company language is French, a user with language set to French can see that option, but a user in the same company with language set to English does not see it.

If you choose not to add them, only picklist values that exactly match the ones in the application are imported. (Values are case-sensitive.) The Import Results email message warns you when this situation occurs.

The company administrator has the ability to change the picklist values for fields except for a few specific fields (for the exceptions, see the guidelines for the record type you want to import).

NOTE: If you select the option to add new picklist values when importing data, those new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during that time period.

To compare the data in your file to the valid values in the application

- 1 Open your file in a spreadsheet application.

TIP: If you open the file in Microsoft Excel, you can use the AutoFilter feature to see which values appear for specific columns in your file.

- 2 Compare the values in your file against the valid values in Oracle CRM On Demand by doing one of the following:

- If you are an administrator, click the Admin global link in the application and go to the Field Setup page containing the field whose values you want to compare.
- In Oracle CRM On Demand, click the appropriate tab and select a record. On the Edit page, click the drop-down list for the field you want to check, and compare those values against your data.

TIP: If you decide to restrict the import data to *only* those values that match the existing ones, make sure every imported value matches an existing value. Case matters when determining if there is a match. You can either change the data in the import file to match the valid values or add picklist values to the application (see [Changing Picklist Values](#) (on page 1054)).

Number

Import data can be any number between -2,147,483,648 and 2,147,483,647. Commas in your import data are ignored as well as digits after a decimal point (rounding does *not* occur). For example, all these valid values appear as 1,234 in the application:

1234
1,234
1234.9

During import, if a value with unexpected characters is found or the value is out of the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Number fields are represented in a common format in the application (for example: 1,234).

Integer

Integers can be any whole numbers ranging in value from - 2147483648 to 2147483647.

Currency

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Import data can be preceded by a \$ or other currency character. Negative numbers are valid.

During import, if a value with unexpected characters is found or the value contains too many digits, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Currency fields are represented in a common format in the application (for example: \$1,000,000.00).

Percent

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Negative numbers are valid. Import data may be preceded or followed by a % character and any number of spaces between the number and the %. For example, all these valid values appear as 1,234.36% in the application:

1234.36
1,234.36
1234.35678
1234.36%
1,234.36 %

During import, if a value with unexpected characters is found or the value is out of the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Percent fields are represented in a common format in the application (for example: 1,234.36% (with commas and followed by a % sign)).

Check box

A check box has only two settings: checked or unchecked. The following table shows you the values you can use when importing data. These values are not case-sensitive, so the application recognizes "true," "t," and so on.

Check box is selected	Check box is blank (not selected)
1	0
Y	N
Yes	No
T	F
True	False
Checked	Unchecked

All other values in the import data result in an unchecked setting for the check box field in the application. The Import Results email message does *not* warn you when this situation occurs.

You must use your translated equivalents of the values in the tables, if you are importing under a different language. However, the application will accept the values in the first two rows of the table, regardless of your language setting: Y, N, 1, 0.

TIP: Check for values that might be expected to result in the checked setting but that are not recognized as such during import. Convert those values to Y before importing.

During the import process, if a check box field for the record type being imported is not mapped to an import file field, its value is set to unchecked for each imported record.

Email

If the import data does not match a certain format, the data for the field is not imported. The following criteria are considered invalid:

- Email data ending or beginning with the at sign (@) or period (.). Both symbols must be surrounded by alpha-numeric characters. For example, these values are not valid:
a@.
@a.
@.a
a@a.
a@.a
@a.a
- Empty string
- String too long
- No characters before the @ at sign, for example: @rightequip.com
- No @ at sign, for example: isamplerightequip.com
- No period (.), for example: isample@rightequipcom
- No domain, for example: isample@
- No domain suffix such as com, for example: isample@rightequip
- Multiple at signs (@), for example: isample@@rightequip.com
- Consecutive periods (.), for example: isample@rightequip..com
- Spaces in the string, for example: isa mple@rightequip
- Characters other than the following in the local part of an email address:
 - Uppercase and lowercase letters (case insensitive)
 - The digits 0 through 9
 - The characters ! # \$ % & ' * + - / = ? ^ _ ` { | } ~ .
- Any special characters in the domain name of an email address. Special characters include: ! # \$ % & ' * + - / = ? ^ _ ` { | } ~ ()

The Import Results email message warns you when data for the field is not imported as a result of incorrect formatting.

Phone

The same format rules for entering phone number data apply to importing phone number data. Data in a recognized phone number format is converted to a consistent format in the application.

The field length rules that apply to text fields also apply to phone number fields. In particular, if the import data exceeds the length of the application field, the excess characters are *not* imported. The Import Results email message warns you when this situation occurs.

Date/Time

Import data can contain several different date/time representations. As part of the importing process, you select the format used in your CSV file.

Regardless of their imported format, Date/Time fields are represented in a common format in the application (for example: 01/19/1964 12:15 PM). The format used to display data is determined by the Locale setting of the user, which is shown on the Personal Detail page.

The date/time values are assumed to be correct for the time zone of the person doing the import, as specified on their Personal Detail page in the application. After the dates/times are imported, however, users viewing the data from a different time zone see the date/time adjusted for their time zone.

TIP: Make sure that the time zone of the person performing the import matches the time zone of the date/times in the import data file. For instance, if the date/times specified in the import data are relevant to Pacific Standard Time, and a user in the Eastern Standard Time zone imports that data, all times will be incorrect by three hours. The solution is for the user to temporarily set the time zone to Pacific Standard Time when doing the import, so the times are imported correctly. Be sure you know what time zone the date/times in your import file are relative to before you start an import. Note that it is very common for date/times in CSV data files to be in Greenwich Mean Time (GMT) format, so be sure to check this item prior to import.

■ About Dates in Date/Time Field Type

When running the Import Assistant, you are required to specify whether import data has dates with month (MM) first, or day (DD) first. If you specify month first, the following formats are supported:

MM/DD/YY
MM/DD/YYYY
MM/DD (year defaults to current year)

If you specify day first, the following formats are supported:

DD/MM/YY
DD/MM/YYYY
DD/MM (year defaults to current year)

You may also specify that the import data format is: YYYY-MM-DD.

For all these formats, MM and DD can contain a leading 0 when the date or month is a single digit, but the 0 is not required.

NOTE: Dates in the format DD-MON-YY or DD-MON-YYYY are *not* currently supported.

■ About Times in Date/Time Field Type

A time can be specified in the import data. To specify a time with a date, include a space after the date and then the time. If there is no time specified with a date, the time is set to 00:00:00 (midnight). The following time formats are supported:

HH24:MI:SS
HH:MI:SS AM
(where HH24 represents a 24-hour time, and AM represents either AM or PM if HH is a 12-hour value)

MI or SS can be omitted; and if omitted, they are set to 00 during import. HH, MI and SS can contain a leading 0 when the value is a single digit, but the 0 is not required.

NOTE: Regardless of the date/time format option you select during import, the import process accepts times in 24-hour format. For example, if you select the default Canada format, which is hh:mm:ss AM/PM, and your file shows a time of 15:00:00, the data is properly imported as 3:00:00 PM.

Date

Date type fields in the application allow entry and display of only a date; they do not allow time to be specified. When importing into one of these fields, valid import data formats are the same as for Date/Time type fields. However, time should *not* be specified in the import data. If a time is specified, it is ignored during the import.

Regardless of their imported format, Date fields are represented in a common format in the application (for example: 12/18/2003).

About Required Fields

If a field has been designated as required (either by default or by the administrator), the entire record is rejected if you don't map the required fields to columns in your CSV file. The Import Results email message warns you when this situation occurs.

TIP: Review the fields for the record type you are importing to determine which ones are required fields. Make sure the import data contains a valid value for all those fields.

About Read-Only Fields

Read-only fields follow this behavior during an import:

- If a read-only field has a picklist, you must match the picklist values exactly to import them.
- If you have read-only access to a field, you are not able to import data into that field.

Preparing for Data Importing

Before you start importing data in Oracle CRM On Demand, you must first determine what import method you want to use. For more information on selecting the appropriate import method, see [Import and Export Tools](#) (on page 1282). For example, the Oracle Data Loader On Demand Utility supports only specific record types. For more information, see Oracle Data Loader On Demand Guide. It is also recommended that you read the following topic before you perform an import: Before You Import Data.

You might need to edit data in your CSV file or customize Oracle CRM On Demand to make sure all your file data is imported. To determine if that is necessary, do the following before you begin importing:

- Determine the record types you want to import.
You might want to import different record types, such as leads, accounts, contacts, and notes. You must import one record type at a time, and you should follow the recommended sequence for importing.

For example, if you have a file that contains a list of your contacts and another file with your accounts, you want to import accounts first and then contacts to maintain the relationships set up between those record types.

The sequence order is shown on the user interface itself on the Import and Export Tools page.

- Check the data in your file to make sure it:
 - Has consistent capitalization, abbreviations, and spelling

Text values are imported exactly as they appear in your CSV file. Therefore, any differences in capitalization can result in additional records being created, when that is not desired. For example, all these values for Account Names would result in new records: ABC, abc, A.B.C.

Additionally, since two account records are recognized as identical if the account name *and* location are identical, addresses must be spelled, capitalized, and abbreviated identically to prevent additional records from being created. For example all these records would **not** be considered identical:

ABC, 111 10th Avenue

ABC, 111 10th Ave.

ABC, 111 10th Ave

ABC, 111 Tenth Avenue

- Does not exceed the maximum length allowed
- Conforms to the formatting requirements for that field

For more information, see [Data Checking Guidelines](#) (on page 1318).

- Check the application for required fields for the record type you want to import.

You must map data in your CSV file to all required fields. If you don't, the record is rejected. To determine which fields are required, see the Edit page for the record type you want to import. Required fields are shown in red text.

- Add fields to the application if you want to import data that doesn't map to the default fields in the application.

During the import process, you must match every field in your file to an existing field in the application to capture that data. If your role includes the Customize Application privilege, you can create new (custom) fields in Oracle CRM On Demand to map to the existing fields. For instructions, see [Creating and Editing Fields](#) (on page 1043).

- Set up picklist values, if necessary.

During the import process, you can specify how you want the application to handle picklist values in your CSV file that don't match existing picklist values in the application:

- Add them as new ones to the application

NOTE: To see the picklist value changes in the application, you might need to sign out and in again.

- Don't add them (capture only the values that match and leave the others blank)

If you want to use the picklist values that exist in the application and import only the data that matches them, verify that the picklist values match exactly, including their spelling and capitalization (values are case-sensitive).

Some picklist values cannot be changed, and a few don't follow this behavior. See [Data Checking Guidelines](#) (on page 1318) and review the guidelines for the record type you want to import.

- Select the correct time format.

If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows:

- If the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM.
- If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

Related Topics

See the following topics for related information:

- [Changing Picklist Values](#) (on page 1054)
- [Import and Export Tools](#) (on page 1282)

For more information about preparing data importing, see 565278.1 (Article ID) on My Oracle Support.

Account Fields: Import Preparation

The following table contains specific information about setting up your records before importing accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Name	Text	100	This field is required by default. Therefore, make sure all records have values in this field before import.
Account Type	Picklist	30	Default valid values: Competitor, Customer, Partner, and Prospect
Annual Revenues	Currency	15	None
Billing Address 2, 3	Text	100 each	None
Billing Address1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
Billing City	Text	50	None

Default Account Field Name	Data Type	Maximum Length	Comments
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1286)).
Billing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1286)).
Billing Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1286)).
Billing US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Billing Zip/Post Code	Text	30	None
Call Frequency	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters and the remaining characters are added to linked Notes, each with a maximum limit of 16,350 characters.
External Unique ID	Text	30	None
Furigana Name	Text	100	The Furigana equivalent of the Kanji (for Japanese only).
HIN	Text		Health Industry Number. Specific to Oracle CRM On Demand Life Sciences Edition.

Default Account Field Name	Data Type	Maximum Length	Comments
Industry	Picklist	50	<p>The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. Alternatively, your company's Oracle CRM On Demand administrator can create a custom Account field that contains the valid values that you expect in your import data. This would allow you to import your data into that custom field instead of this field.</p> <p>Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications</p>
Influence Type	Text	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Integration ID	Text	30	None
Last Call Date	UTC Date Time	7	Specific to Oracle CRM On Demand Life Sciences Edition.
Location	Text	50	<p>In most cases, this field is used to determine record duplication. For more information, see About Record Duplicates and External IDs (on page 1302).</p> <p>For example, to distinguish between headquarters and a branch office of Account XYZ, the application checks both the Account Name and the Location to determine if the record is a duplicate.</p>
Main Fax #	Phone	40	None
Main Phone #	Phone	40	None
Market Potential	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Segment	Text	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this text.
Market Share	Number	22	Specific to Oracle CRM On Demand Life Sciences Edition.
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Number of Employees	Integer	Not applicable	None

Default Account Field Name	Data Type	Maximum Length	Comments
Number of Physicians	Number	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Owner	Email	50	<p>File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Parent Account	Text	100	Must be a valid Account name.
Parent Account External ID	Text	30	None
Parent Account Location	Text	50	None
Partner	Check box	Not applicable	Indication that the account is a partner.
Priority	Picklist	30	Default valid values: Low, Medium, and High
Public Company	Check box	Not applicable	This field should be set to the checked state if this is a public (versus privately-owned) company.
Reassign Account	Check box	Not applicable	Indication that the account should be reassigned. When imported, triggers automatic assignment rules for this account record, if your company administrator or manager has set that feature up.
Reference	Check box	Not applicable	This field should be set to the checked state if this account agreed to be a reference that you can give out to prospects.
Reference as of	Date	Not applicable	None
Region	Picklist	25	Default valid values: East, West, and Central
Route	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit the picklist.

Default Account Field Name	Data Type	Maximum Length	Comments
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
Shipping Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
Shipping City	Text	50	None
Shipping Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1286)).
Shipping PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1286)).
Shipping Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1286)).
Shipping US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Shipping Zip/Post Code	Text	30	None
Source Campaign	Picklist	30	The campaign that generated the account.
Status	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit the picklist.
Territory	Text	255	None

Default Account Field Name	Data Type	Maximum Length	Comments
Web Site	Text	100	No formatting checking (except length checking) is done on the imported data for this field.
YTD Revenue	Number	22	Specific to Oracle CRM On Demand Life Sciences Edition.

Account Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing account teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Account Team Field Name	Field Type	Maximum Length	Comments
Account Access	Picklist	15	Default valid values: Full, Readonly, Edit, Owner. You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Location	Text	50	None
Account Name	Text	100	None
Contact Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Opportunity Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Team Role	Text	20	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	None
Account External ID	Text	30	None

User External ID	Text	30	None
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Accreditation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing accreditation data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Accreditation Field Name	Field Type	Maximum Length	Comments
Accreditation Fee	Currency	22	None.
Accreditation ID	Text	50	It is recommended that the internal identifier for the accreditation be unique.
Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	50	None.
Contact	Picklist	15	Use this field if the accreditation contact is already present in Oracle CRM On Demand.
Description	Text	250	None.
Email	Text	40	The email address for the accreditation contact.
First Name	Text	50	Use this field to enter the accreditation contact's first name only if the contact is not present in Oracle CRM On Demand.
Last Name	Text	50	Use this field to enter the accreditation contact's last name only if the contact is not present in Oracle CRM On Demand.
Name	Text	50	It is recommended that the accreditation name be unique.
Objective	Picklist	50	None.
Owner	Picklist	15	None.
Payment Options	Picklist	30	The default valid values are as follows: Check, Credit Card, Cash, and Earned Funds.
Phone	Phone	50	The phone number for the accreditation contact.

Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Renewable	Check box	1	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Validity (Months)	Number	22	None.
Website	Text	100	The URL for a page that contains additional accreditation information.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Accreditation Fields](#) (on page 422)

Accreditation Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing request data for course accreditation into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Accreditation Request Field Name	Field Type	Maximum Length	Comments
Accreditation Date	Date	7	None.
Accreditation Name	Picklist	15	None.
Accreditation Number	Text	50	Accreditation numbers are usually unique.
Accreditation Status	Picklist	30	The default valid values are as follows: Requested, Granted, and Denied.
Description	Text	250	None.

Expiration Date	Date	7	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Partner Name	Picklist	15	None.
Plan	Picklist	15	None.
Renewable	Check box	1	None.
Request Date	Date	7	This field displays the current date during record creation by default, but you can modify it during and after record creation.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Allocation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing allocations into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Allocation Field Name	Data Type	Maximum Length	Comments
Allocation Type	Text	30	None
Allocation Qty	Number	22	The quantity of the product that is allocated to the sales representative from the administrator.
End Date	Date/Time	7	The last date on which the product can be disbursed.
Max Qty	Number	22	The quantity of the product that the sales representative can distribute at a given time to a customer.
Order By	Number	22	The order in which the user can see the products in the list.

Default Allocation Field Name	Data Type	Maximum Length	Comments
Sample	Text	15	The product name associated with the allocation.
Start Date	Date/Time	7	The date on which the distribution starts.
Stop Sampling Flag	Boolean	1	When this field is selected, it indicates that the product can no longer be disbursed.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Application Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing application records into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Application Field Name	Data Type	Maximum Length	Comments
Address Address 1	Varchar	200	The number and street of the company's address from whom the application is made.
Address Address 2	Varchar	100	None
Address Address 3	Varchar	100	None
Address City	Varchar	50	None
Address Country	Varchar	30	None
Address PO Box/Sorting Code	Varchar	200	None
Address Province	Varchar	50	None
Address US State	Varchar	10	None

Default Application Field Name	Data Type	Maximum Length	Comments
Address Zip/Post Code	Varchar	30	None
Annual Revenue	Number	22	The total annual revenue for the company.
Approval Status	Varchar	30	The current approval status for the application.
Approved Date	Date	7	The date and time that the application was approved.
Campaign	Varchar	15	This is the name of the campaign that attracted the partner to make the partner application.
Cellular Phone #	Varchar	40	The submitter's cellular phone number.
Current Approver	Varchar	15	The name of the current approver.
Email Address	Varchar	100	The submitter's email address.
Existing Partnerships	Varchar		The list of existing partnerships.
Expected Partnership Benefits	Varchar	500	The list of expected benefits from this partnership.
First Name	Varchar	50	The submitter's first name.
Industry	Varchar	50	The industry in which the company competes.
Job Title	Varchar	75	The submitter's job title.
Last Name	Varchar	50	The submitter's last name.
Location	Varchar	50	The location of the company.
Main Fax #	Varchar	40	The primary fax number for the company.
Main Phone #	Varchar	40	The primary phone number used to reach the company.
Name	Varchar	50	The name of the company.
Number of Employees	Number	22	The total number of employees in the company.
Owner	Varchar	15	The owner of the record.
Partner	Varchar	15	The partner who is associated with this application.
Partner Program	Varchar	15	The name of the partner program

Default Application Field Name	Data Type	Maximum Length	Comments
			associated with the application.
Partner Type	Varchar	30	The type of partner for which the application is being submitted.
Program Level	Varchar	30	The level of the partner program associated with the application.
Reject Reason	Varchar	30	The reason why the application was rejected.
Source	Varchar	30	The source from which this application comes, for example, Web site, direct mail, email, and so on.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	Date	7	The submission date and time of the application.
Web Site	Varchar	100	The URL address for the company.
Work Fax #	Varchar	40	The submitter's work fax number.
Work Phone #	Varchar	40	The submitter's work phone number.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Appointment Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and an appointment into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Appointment Contact Field Name	Data Type	Maximum Length	Comments
Contact Full Name	Text	255	None

Default Appointment Contact Field Name	Data Type	Maximum Length	Comments
Contact External ID	Text	30	None
Appointment External ID	Text	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Appointment User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and an appointment into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Appointment User Field Name	Data Type	Maximum Length	Comments
User ID	Text	30	None
Appointment External ID	Text	30	None
User External ID	Text	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Appointment, Task, and Call Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing appointments and tasks into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Select the correct time format. If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows: if the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM. If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Account Location	Text	50	None
Activity	Text	100	None
Activity Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Campaign	Text	50	None
Campaign External ID	Text	30	None
Contact	Text	255	None
Contact External ID	Text	30	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Due Date	Date	7	For tasks, required field by default.
End Time	Date/Time	7	For appointments, required field by default.

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
External Unique ID	Text	30	None
Fund Request	Picklist	30	Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition. Read-only.
Integration ID	Text	30	None
Lead	Text	255	None
Lead External ID	Text	30	None
Location	Text	100	For appointments only.
MedEd Event	Picklist	50	Specific to Oracle CRM On Demand Life Sciences Edition.
Opportunity	Text	100	None
Opportunity External ID	Text	30	None
Owner	Email	50	<p>File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Priority	Picklist	30	For tasks, required field by default. Default valid values: 1-High, 2-Medium, 3-Low
Private	Check box	Not applicable	None
Service Request	Text	64	None
Service Request External ID	Text	30	None
Start Time	Date/Time	7	For appointments, required field by default.

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
Status	Picklist	30	For tasks, the default valid values are: Completed, Deferred, In Progress, Waiting For Someone Else, Not Started
Subject	Text	100	For tasks and appointments, required field by default.
Task Currency	Text	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Type	Picklist	30	For tasks and appointments, the default valid values are: Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Other, Personal, Presentation, To Do

Related Topics

See the following topics for related information:

- [Activity Fields](#) (on page 143)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Asset Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing assets into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Asset Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Asset Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the

Default Asset Field Name	Data Type	Maximum Length	Comments
			valid values.
Contract	Text	30	None
Customer Contact	Text	255	None
Description	Text	250	None
Expiration Date	Date	7	None
External Unique ID	Text	30	None
Install Date	Date	7	None
Integration ID	Text	30	None
Notify Date	Date	7	Specific to Oracle CRM On Demand High Tech Edition.
Operating Status	Text	30	None
Product External ID	Text	30	None
Product Name	Text	100	Required field by default.
Purchase Date	Date	7	None
Purchase Price	Currency	15	None
Quantity	Number	15	None
Serial #	Text	100	None
Ship Date	Date	7	None
Warranty	Text	30	None

Related Topics

See the following topics for related information:

- [Tracking Assets](#) (on page 188)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Broker Profile Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing broker profile data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Broker Profile Field Name	Field Type	Maximum Length	Comments
Broker Profile Name	Text	40	The name of the broker profile.
Broker Profile Year	Picklist	30	The year during which the broker profile is valid.
Company Historic and Future Growth	Text	250	The description of the company history and future growth for the broker.
Company Overview	Text	250	Provides additional information about the broker.
Created	Text	30	Oracle CRM On Demand generates this information: the name of the person who created the broker profile followed by the date.
Fax Number	Phone	35	The broker fax number
Modified	Text	30	Oracle CRM On Demand generates this information: the name of the person who last modified the broker profile followed by the date.
Partner	Picklist	30	The broker name.
Phone Number	Phone	35	The broker phone number.
Primary Address	Text	50	The broker primary address.
Sub Channel	Picklist	30	The broker coverage. The default valid values are as follows: Globals, Locals, Nationals, Regionals, and Wholesalers.
Segmentation	Picklist	30	The broker segmentation. The default valid values are as follows: Commercial, Growth, and Retail.
Territory/Regional Structure	Text	250	The broker territory or regional structure.
Website	Text	100	The URL for a page that contains additional broker profile information.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)

■ [Importing Your Data](#) (on page 1448)

■ [Broker Profile Fields](#) (on page 582)

Business Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing business plan fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Business Plan Fields Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Currency	Picklist	20	None
Description	Note	250	None
Exchange Date	Date	7	None
Notes	Text	250	None
Opportunities	Text	250	None
Parent Plan Name	Text	15	The reference field for holding the Business Plan Object ID.
Period	Text	15	The reference field for holding the Period Object ID.
Plan Revenue	Currency	22	None
Product Name	Text	15	The reference field for holding the Product Object ID.
Status	Picklist	30	None
Strengths	Text	250	None
Threats	Text	250	None
Type	Picklist	30	None
Weaknesses	Text	250	None

Related Topics

See the following topics for related information:

■ [Field Type Guidelines for Importing Data](#) (on page 1319)

■ [Importing Your Data](#) (on page 1448)

Campaign Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing campaigns into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Campaign Field Name	Data Type	Maximum Length	Comments
Actual Cost	Currency	15	None
Audience	Text	2000	None
Budgeted Cost	Currency	15	None
Campaign Currency	Picklist	15	None
Campaign Email	Text	50	None
Campaign Name	Text	50	Required field by default.
Campaign Phone #	Phone	40	None
Campaign Type	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, Other
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
End Date	Date	7	None
External Unique ID	Text	30	None
Leads Targeted (#)	Integer	Not applicable	None
Objective	Text	2000	None
Offer	Text	255	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On

Default Campaign Field Name	Data Type	Maximum Length	Comments
			<p>Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Revenue Target	Currency	15	None
Source Code	Text	30	Required field by default.
Start Date	Date	7	None
Status	Picklist	30	Default valid values: Planned, Active, Completed

Related Topics

See the following topics for related information:

- [Campaign Fields: Import Preparation](#) (on page 1345)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Campaign Recipient Fields: Import Preparation

The following table contains specific information about setting up your CSV file before campaign recipients into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. To import Campaign Recipient fields, the minimum information required is the Contact External ID and Campaign Name.

Default Product Category Field Name	Data Type	Maximum Length
Delivery Status	Text	30

Default Product Category Field Name	Data Type	Maximum Length
Response Status	Text	30
Campaign Name	Text	100
Contact Full Name	Text	255
Campaign External ID	Text	30
Contact External ID	Text	30
Description	Text	250

Certification Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing certification data into Oracle CRM On Demand. This information supplements the guidelines given in the topic, [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Certification Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Certification Fee	Currency	22	None.
Certification ID	Text	50	It is recommended that the internal identifier for the certification be unique.
Company	Text	50	None.
Contact	Picklist	15	Use this field if the certification contact is already present in Oracle CRM On Demand.
Description	Text	250	None.
Email	Text	50	The email address for the certification contact.
First Name	Text	50	Use this field to enter the certification contact's first name only if the contact is not present in Oracle CRM On Demand.
Last Name	Text	50	Use this field to enter the certification contact's last name only if the contact is not present in Oracle CRM

			On Demand.
Name	Text	50	The name of the certification.
Objective	Picklist	15	None.
Owner	Picklist	30	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the certification contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Renewable	Check box	1	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Pre-Sales, Post-Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Validity (Months)	Number	22	None.
Website	Text	100	The URL to a page that contains additional certification information.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Certification Fields](#) (on page 413)

Certification Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing certification request data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Certification Request Field Name	Field Type	Maximum Length	Comments
Candidate Name	Picklist	15	None.
Candidate Date	Date	7	None.
Certification Name	Picklist	15	None.
Certification Number	Text	50	Certification numbers are usually unique.
Certification Status	Picklist	30	The default valid values are as follows: Requested, Granted, and Denied.
Description	Text	250	None.
Expiration Date	Date	7	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Plan	Picklist	15	None.
Request Date	Date	7	This field displays the current date during record creation by default, but you can it modify during and after record creation.
Renewable	Check box	1	None.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Certification Fields](#) (on page 413)

Claim Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing claims data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for claims data only.

Claim Field Name	Data Type	Maximum Length	Comments
Ability to Work	Picklist	30	None
Address	Text	200	None
Address Line 1	Text	100	None
Address Line 2	Text	100	None
Amount of Liability	Currency	22	None
Amount of Loss	Currency	22	None
At Fault	Picklist	30	None
Business Account	Text	15	The held away institution (business account) linked to this record.
Business Account: External System ID	Text	30	None
Category of Loss	Picklist	30	None
City	Text	50	None
Claim Number	Text	50	The predefined field for the matching record.
Class of Employee	Picklist	30	None
Closed Date	Date	Not applicable	None
Comments	Text	250	None
Company: External System ID	Text	30	Also known as the external unique ID.
Conditions	Text	50	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Country	Text	30	None
County	Text	50	None
Currency Code	Picklist	20	None
Date of Employer Aware of Claim	Date	Not applicable	None
Date of Employer Aware of Injury	Date	Not applicable	None
Employee Injured Number	Number	22	None

Claim Field Name	Data Type	Maximum Length	Comments
Event Number	Text	50	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Hospital Name	Text	50	None
Household	Text	15	None
Household: External System ID	Text	30	None
Injured During Working Hours	Picklist	30	None
Kind of Loss	Picklist	30	None
Liability Source	Picklist	30	None
Line of Business	Picklist	30	None
Location of Loss	Picklist	30	None
Loss Code	Picklist	30	None
Loss Date and Time	Date/Time	Not applicable	None
Loss Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Loss Type	Picklist	30	None
Medical Injury Code	Picklist	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Part of Body Injured	Picklist	30	None
People Injured Number	Number	22	None
Place of Injury	Picklist	30	None
Police Department	Text	50	None
Police Report Number	Text	50	None
Policy	Text	50	The predefined field for the

Claim Field Name	Data Type	Maximum Length	Comments
			matching record.
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record.
Postal Code	Text	30	None
Province	Text	50	None
Relationship to Insured	Picklist	30	None
Report Date	Date	Not applicable	None
Report Number	Text	50	None
Reported by	Picklist	30	None
Reporter Contact Info	Text	50	None
State	Text	10	None
Status	Picklist	30	None
Time of Death	Date/Time	Not applicable	None
Type of Injury	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Contact Fields: Import Preparation

If you have separate files to import for accounts and contacts, import the accounts first, and then the contacts. Be sure that your Contacts import file contains valid account names from the Accounts import file.

If you only have a Contacts import file, account records are created based on the account name data found in the Account Name field in the Contacts import file. If the contact record contains alternate address data, Oracle CRM On Demand creates a new account and populates the shipping address with the alternative address. The Billing address remains blank.

If multiple contacts are associated with the same account, the account's address fields are set to the Alternate address values associated with the first contact imported for that account. If the first contact imported does not contain alternate address data-but subsequent records *do*, the account's address fields are blank, since only the first imported contact is considered when setting the values of the account address fields. Therefore, if you are importing only from a Contacts import file, before importing, sort the data by Account Name, then make sure that the first contact for each different Account Name contains the address you want to use for the account.

The following table contains specific information about setting up your CSV file before importing contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Contact Field Name	Data Type	Maximum Length	Comments
Account	Text	100	The text for this field is one of several fields used to match an existing Account record. If no match is found, it is the Account Name for a new Account that gets created as part of the Contact import process. For more information, see About Record Duplicates and External IDs (on page 1302).
Account External ID	Text	30	None
Account Location	Text	50	The text for this field is one of several fields used to match an existing Account record. For more information, see About Record Duplicates and External IDs (on page 1302).
Assistant Name	Text	50	None
Assistant Phone #	Phone	40	None
Best Time to Call	Picklist	30	Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning, and Saturday. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Call Frequency	Picklist	30	Default values are No See, 1-2 Times/Year, 3-4 Times/Year, and >5 Time/Year. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Cellular Phone #	Phone	40	None
Client Since Date	Date	Not applicable	This field is automatically populated with current date once the Client value is selected in the Contact Type drop-down menu.

Default Contact Field Name	Data Type	Maximum Length	Comments
Contact Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
Contact Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
Contact City	Text	50	None
Contact Country	Picklist	30	Default values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1286)).
Contact Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contact PO Box/Sorting Code	Text	50	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1286)).
Contact Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1286)).
Contact Type	Picklist	30	Default valid values: Prospect, Customer, Partner, and Competitor

Default Contact Field Name	Data Type	Maximum Length	Comments
Contact US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Contact Zip/Post Code	Text	30	None
Credit Score	Number	22	Specific to Oracle CRM On Demand Financial Services Edition.
Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Current Investment Mix	Picklist	30	Default values are Aggressive, Moderate, and Conservative. Specific to Oracle CRM On Demand Financial Services Edition. You can edit this picklist.
Customer ID	Text	11	Specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	Date	7	Specific to Oracle CRM On Demand Financial Services Edition.
Degree	Picklist	30	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN, and Master of Public Health. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Department	Text	75	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Email	Text	100	None
Experience Level	Picklist	30	Default values are None, Limited, Good, and Extensive. Specific to Oracle CRM On Demand Financial Services Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
			You can edit this picklist.
External Unique ID	Text	30	None
First Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Gender	Picklist	1	Default values are F and M. You can edit this picklist. Specific to Oracle CRM On Demand Financial Services Edition.
Home Phone #	Phone	40	None
Home Value	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Integration ID	Text	30	None
Investment Horizon	Picklist	30	Default values are Short term, Medium term, and Long term. You can edit this picklist. Specific to Oracle CRM On Demand Financial Services Edition.
Job Title	Text	75	None
Last Call Date	Date/Time		Specific to Oracle CRM On Demand Life Sciences Edition.
Last Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Lead Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, and Other.

Default Contact Field Name	Data Type	Maximum Length	Comments
Life Event	Picklist	30	Default values are Marriage, Birth of Child, Retirement, Divorce, and Other. Specific to Oracle CRM On Demand Financial Services Edition.
Manager	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Contact Edit page).
Manager External ID	Text	30	None
Marital Status	Picklist	30	Default values are Single, Divorced, Married, Partner, Separated, Widowed, and Widower. Specific to Oracle CRM On Demand Financial Services Edition.
Market Potential	Picklist	30	Default values are High, Medium, and Low. Specific to Oracle CRM On Demand Life Sciences Edition.
Middle Name	Text	50	None
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr./Ms.	Picklist	15	Default valid values: Miss., Mr., Ms., Mrs., and Dr.
Never Email	Check box	Not applicable	None
Objective	Picklist	30	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth, and International Diversification. Specific to Oracle CRM On Demand Financial Services Edition.
Opt In	Check box	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Opt Out	Check box	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Own or Rent	Picklist	30	Default values are Own or Rent. Specific to Oracle CRM On Demand Financial Services Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Owner	Email	50	<p>File data must match the User Sign In ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On email ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On email ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Primary Goal	Picklist	30	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets, and Retirement. Specific to Oracle CRM On Demand Financial Services Edition.
Private	Check box	Not applicable	This field should be set to the checked state if you want this contact to be visible only to the account owner.
Profession	Text	50	None.
Qualified Date	Date/Time	Not applicable	None.
Risk Profile	Picklist	30	Default values are Risk Averse, Risk Taker, Conservative, Moderate, and Aggressive. Oracle CRM On Demand Financial Services Edition.
Referred by	Picklist	101	None.
Route	Picklist	30	Default values are Route 1, Route 2, Route 3, and Route 4. Specific to Oracle CRM On Demand Life Sciences Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Segment	Picklist	30	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth. Specific to Oracle CRM On Demand Financial Services Edition.
Self-Employed	Check box	Not applicable	Specific to Oracle CRM On Demand Financial Services Edition.
Source Campaign	Picklist	100	The campaign that generated the contact.
Status	Picklist	30	This column stores the status of a client or contact. The following values are allowed: Active, Quiet Filed, and Dead Filed.
Tax Bracket	Number	22	Specific to Oracle CRM On Demand Financial Services Edition.
Tier	Picklist	30	Default values are Gold, Silver, Bronze, Top 100, Top, Medium, and Low. Specific to Oracle CRM On Demand Financial Services Edition.
Time Zone	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the standard valid values.
Total Assets	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Expenses	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Income	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Liabilities	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Net Worth	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Type	Picklist	30	Default values are Prospect, Customer, Partner, and Competitor.
Work Fax #	Phone	40	None
Work Phone #	Phone	40	None

Default Contact Field Name	Data Type	Maximum Length	Comments
YTD Sales	Currency	15	Specific to Oracle CRM On Demand Life Sciences Edition.

Related Topics

See the following topics for related information:

- [Contact Fields](#) (on page 206)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Contact State License Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact state licenses into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Contact State License Field Name	Data Type	Maximum Length	Comments
Contact	Text	15	None
Expiration Date	Text	7	The date on which the medical license for this contact will expire, if known.
License Number	Text	30	The required license number for the contact in the designated state.
State	Text	30	A state in the United States or a province in Canada (optional).
Status	Text	30	The default values for the status of the license are: Blank, Active, or Expired.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Contact State Licenses](#) (on page 435)

Contact Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Contact Team Field Name	Data Type	Maximum Length	Comments
Contact Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contact Full Name	Text	60	None
Team Role	Text	20	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	None
Contact External ID	Text	30	None
User External ID	Text	30	None

Related Topics

See the following topics for related information:

- [Sharing Records \(Teams\)](#) (on page 84)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Course Enrollment Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing course enrollment data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Course Enrollment Field Name	Field Type	Maximum Length	Comments
Candidate Name	Picklist	15	None.
Completion Date	Date	22	None.
Course Name	Picklist	15	It is recommended that the course name be unique.
Description	Text	250	None.
Enrollment Date	Date	22	This field displays the current date during record creation by default, but you can modify it during and after record creation.
Enrollment Number	Text	100	None.
Enrollment Status	Picklist	30	The default valid values are as follows: Enrolled, Completed, and Incomplete.
Objective	Picklist	15	None.
Offering Partner	Picklist	15	The third-party company that the candidate is enrolling with for the course. The entry is usually from the list of offering partners for the course.
Owner	Picklist	15	None.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Course Fields](#) (on page 394)

Course Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing course data into Oracle CRM On Demand. This information supplements the guidelines given in the topic, [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Course Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.

Available To	Date	7	None.
Company	Text	100	The company where the course contact works.
Contact	Picklist	15	Use this field if the course contact is already present in Oracle CRM On Demand.
Course Fee	Currency	22	None.
Course ID	Text	30	It is recommended that the internal identifier for the course be unique. Oracle CRM On Demand does not enforce uniqueness.
Course Length (Days)	Number	22	None.
Description	Text	255	None.
Duration (Hours)	Number	22	None.
Email	Text	100	The email address for the course contact.
Exam	Picklist	15	None.
First Name	Text	50	Use this field to enter the course contact's first name only if the contact is not present in Oracle CRM On Demand.
Format	Picklist	30	The default valid values are as follows: Instructor Led, CBT, and Self-Paced.
Hands-on Lab	Check box	1	None.
Last Name	Text	50	Use this field to enter the course contact's last name only if the contact is not present in Oracle CRM On Demand.
Medium	Picklist	30	The default valid values are as follows: Classroom, Online, and CD/DVD.
Name	Text	100	It is recommended that the course name be unique.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the course contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.

Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Pre-Sales, Post-Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Website	Text	100	The URL to a page that contains additional course information.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Course Fields](#) (on page 394)

Coverage Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing coverage data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for coverage data only.

Coverage Field Name	Data Type	Maximum Length	Comments
Begin	Date	Not applicable	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Coverage	Picklist	30	The predefined field for the matching record
Coverage Name	Text	100	None
Coverage Product	Text	15	None
Coverage Product: External System ID	Text	50	Also known as the external unique ID

Coverage Field Name	Data Type	Maximum Length	Comments
Coverage Status	Picklist	30	None
Currency Code	Picklist	20	None
Deductible	Currency	22	None
End	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Individual Limit	Currency	22	None
Insured Amount	Currency	22	None
Insured Property	Text	30	None
Insured Property: External System ID	Text	50	Also known as the external unique ID.
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Policy	Text	15	The predefined field for the matching record.
Policy: External System ID	Text	50	None
Status	Picklist	30	None
Total Limit	Currency	22	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Custom Object Field: Import Preparation

The following tables contain specific information about setting up your CSV file before importing custom object fields for custom objects into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Custom Object 01, Custom Object 02, and Custom Object 03

The information in the following table is valid for Custom Object 01, Custom Object 02, and Custom Object 03 only.

Default Custom Object Field Name	Data Type	Maximum Length
Name	Text	50
Account Location	Text	50
Description	Text	16,350
Custom Objects 04-15	Text	50
Custom Objects 04-15 External Unique ID	Text	30
Integration ID	Text	30
External Unique ID	Text	30
Owner	Email	50
Currency	Text	20
Quick Search 1	Text	50
Quick Search 2	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Number	Number	16
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Checkbox	Boolean	1
Type	Text	30
Account	Text	100

Default Custom Object Field Name	Data Type	Maximum Length
Campaign	Text	100
Contact	Text	255
Custom Object 01	Text	50
Custom Object 02	Text	50
Custom Object 03	Text	50
Dealer	Text	100
Fund	Text	50
Household	Text	50
Lead	Text	255
MedEd Event	Text	50
Opportunity	Text	100
Portfolio	Text	100
Product	Text	100
Service Request	Text	64
Solution	Text	100
Vehicle	Text	100
Account External ID	Text	30
Campaign External ID	Text	30
Contact External ID	Text	30
Custom Object 01 External ID	Text	30
Custom Object 02 External ID	Text	30
Custom Object 03 External ID	Text	30
Lead External ID	Text	30
Opportunity External ID	Text	30
Owner External ID	Text	30
Portfolio External ID	Text	30
Product External ID	Text	30
Service Request External ID	Text	30
Solution External ID	Text	30

Custom Objects 04 and higher

The information in the following table is valid for custom objects 04 and higher only.

Default Custom Object Field Name	Data Type	Maximum Length
Account	Text	100
Activity	Text	100
Campaign	Text	100
Custom Objects 01-15	Text	50
Dealer	Text	100
Description	Text	16,350
Exchange Date	Date	30
External Unique ID	Text	30
Fund	Text	50
Fund Request	Text	50
Household	Text	1
Indexed Checkbox	Boolean	1
Indexed Currency	Currency	25
Indexed Date	DateTime	32
Indexed Number	Number	16
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Integration ID	Text	30
Lead	Text	225
MedEd Event	Text	50
Name	Text	50
Opportunity	Text	100

Default Custom Object Field Name	Data Type	Maximum Length
Owner	Email	50
Portfolio	Text	100
Product	Text	100
Quick Search 1	Text	50
Quick Search 2	Text	50
Service Request	Text	64
Type	Text	30
Vehicle	Text	100
Account External Unique ID	Text	30
Activity External Unique ID	Text	30
Asset External System ID	Text	30
Campaign External Unique ID	Text	30
Company External System ID	Text	30
Contact External Unique ID	Text	30
Custom Objects 01-15 External Unique IDs	Text	30
Dealer External Unique ID	Text	30
Fund Request External Unique ID	Text	30
Household External Unique ID	Text	30
Opportunity External Unique ID	Text	30
Owner External Unique ID	Text	30
Portfolio External Unique ID	Text	30
Product External Unique ID	Text	30
Service Request External Unique ID	Text	30
Solution Request External Unique ID	Text	30
Vehicle External Unique ID	Text	30

Damage Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing damage data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for damage data only.

Damage Field Name	Data Type	Maximum Length	Comments
Claim	Text	15	The predefined field for the matching record.
Claim: External System ID	Text	50	None
Currency Code	Picklist	20	None
Damage Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Damage Name	Text	50	The predefined field for the matching record.
Damaged Property Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Damaged Property Type	Text	50	None
Estimate Amount	Currency	22	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Integration Id	Text	30	None
Insurance Property	Text	15	The predefined field for the matching

Damage Field Name	Data Type	Maximum Length	Comments
			record.
Insurance Property: External System ID	Text	50	None
Owner	Text	15	None
Property #	Number	22	None
Owner: External Unique ID	Text	30	None

Related Topics

■ [Field Type Guidelines for Importing Data](#) (on page 1319)

■ [Importing Your Data](#) (on page 1448)

Deal Registration Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing deal registrations into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Approval Status	Picklist	30	The valid values for this field are: Pending Approval, Approved, Rejected, Returned, Canceled, and Expired.
Approved Date	Date	Not applicable	None
Associated Contact	Picklist	100	None
Associated Customer	Picklist	100	None
Associated Lead	Text	100	None
Associated Lead: External Unique ID	Text	30	None
Associated Lead: First Name	Text	50	None

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Associated Lead: Last Name	Text	50	None
Associated Lead: Integration ID	Text	30	None
Associated Lead: Last Name	Text	50	None
Associated Opportunity	Picklist	100	None
Cell Phone	Text	40	None
City	Text	50	None
Close Date	Date	Not applicable	None
Company Name	Text	50	None
Converted to Opportunity	Checkbox	Not applicable	None
Country	Picklist	50	None
Current Approver	Picklist	100	None
Created: Date	DateTime	Not applicable	None
Currency	Picklist	Not applicable	You cannot edit this picklist. Therefore, the values you import must match the valid values.
Deal Size	Currency	15	None
Description	Text	255	None
Email	Text	50	None
Exchange Rate	Date	Not applicable	None
Expiration Date	Date	Not applicable	None
External ID	Text	40	None
Fax	Text	40	None
Final Approver	Picklist	100	None
First Name	Text	50	None
Job Title	Text	75	None

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Last Name	Text	50	None
Middle Name	Text	50	None
Modified: Date	DateTime	Not applicable	None
Mr./Ms.	Picklist	30	None
Name	Text	100	This field is required by default. Ensure that all records contain values in this field before you perform an import.
New Contact	Checkbox	Not applicable	None
New Customer	Checkbox	Not applicable	None
New Opportunity	Checkbox	Not applicable	This field indicates if the opportunity associated with the deal registration is a new one.
Next Step	Text	250	None
Objective	Text	100	None
Objective: External Unique ID	Text	50	None
Owner	Picklist	30	<p>The data in this field must match the user ID of an existing user of Oracle CRM On Demand. If a record does not contain a valid value for this field (including no value), its value is set to the user ID of the user performing the import.</p> <p>If this field is not mapped to a valid import field when running the Import Assistant, the owner is set to the user ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Owner Partner Account	Picklist	100	This field automatically displays the partner company of the owner of the deal registration by default. This field is read-only. The upload process in Oracle CRM On Demand cannot update

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
			this field.
Originating Partner Account	Picklist	100	The partner who originally discovered the opportunity. This partner is typically the same as the principal partner, but can be different. This field is optional.
Partner Program	Picklist	50	None
Postal Code	Text	30	None
Principal Partner	Picklist	100	The primary partner is responsible for the deal registration. This field together with the Principal Partner Location field uniquely identifies a partner. This field cannot be null.
Principal Partner Location	Text	50	The location of the primary partner mentioned in the previous cell. This field together with the Principal Partner field uniquely identifies a partner. This field can be null.
Product Interest	Text	100	None
Reject Reason	Picklist	30	None
Special Price Req'd.	Checkbox	Not applicable	None
State	Picklist	30	None
Street	Text	100	None
Submission Status	Picklist	30	The valid values for this field are: Not Submitted, Submitted, and Recalled.
Submitted Date	DateTime	Not applicable	None
Support Req'd.	Checkbox	Not applicable	None
Telephone#	Text	40	None
Type	Picklist	30	The default valid values for this field are: Standard and Nonstandard.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Dealer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing dealer fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

NOTE: This section is specific to Oracle CRM On Demand Automotive Edition.

Default Dealer Field Name	Data Type	Maximum Length
Name	Text	100
Site	Text	50
Site	Text	50
Parent Dealer	Text	100
Status	Text	255
Parent Site	Text	50
Phone Number	Phone	40
E-mail	Text	50
URL	Text	100
Status	Text	30
Fax Number	Phone	40
Currency	Text	20
Stage	Text	30
Ranking	Number	16
Billing Address 1	Text	200
Billing Address 2, 3	Text	100 each
Billing City	Text	50
Billing Country	Picklist	30
Billing PO Box/Sorting Code	Text	30

Default Dealer Field Name	Data Type	Maximum Length
Billing Province	Text	50
Billing US State	Picklist	2
Billing Zip/Post Code	Text	30
Shipping Address 1	Text	200
Shipping Address 2, 3	Text	100 each
Shipping City	Text	50
Shipping Country	Picklist	30
Shipping PO Box/Sorting Code	Text	30
Shipping Province	Text	50
Shipping US State	Picklist	2
Shipping Zip/Post Code	Text	30
External Unique ID	Text	30
Parent Dealer External ID	Text	30
Primary Owner Id	Id	15
Dealer Type	Text	30
Modified: Date External	Date/Time	32
Owner	Email	50
Modified By	Text	255
Row Id	Id	15
Integration ID	Text	30
Custom Object <i>N</i>	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Picklist 6	Text	30
Indexed Number	Number	16

Default Dealer Field Name	Data Type	Maximum Length
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Long Text	Text	255
Indexed Short Text 1	Text	100
Indexed Short Text 2	Text	100
Indexed Checkbox	Boolean	1

Exam Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing exam data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Exam Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	100	None.
Contact	Picklist	15	Use this field if the exam contact is already present in Oracle CRM On Demand.
Description	Text	255	None.
Email	Text	100	The email address for the exam contact.
Exam Fee	Currency	22	None.
Exam ID	Text	100	It is recommended that the internal identifier for the course be unique.
First Name	Text	50	Use this field to enter the exam contact's first name only if the contact is not present in Oracle CRM On Demand.
Format	Picklist	30	The default valid values are as follows: Multiple Choice, Q&A, and Blended.
Grading Method	Picklist	30	The default valid values are as follows: Grades,

			Points, and Scores.
Last Name	Text	50	Use this field to enter the exam contact's last name only if the contact is not present in Oracle CRM On Demand.
Maximum Score	Number	22	None.
Medium	Picklist	30	The default valid values are as follows: Computer-Based, Paper-Based, and Blended.
Name	Text	100	It is recommended that the exam name be unique.
Number of Questions	Number	22	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Passing Score	Number	22	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the exam contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Time Allowed (Minutes)	Number	22	None.
Type	Picklist	30	The default valid values are as follows: Proctored and Online. An exam is considered to be <i>proctored</i> when the candidates are supervised during the exam.
Validity (Months)	Number	22	None.
Website	Text	100	The URL to a page that contains additional exam information.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Exam Fields](#) (on page 403)

Exam Registration Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing exam registration data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Exam Registration Field Name	Field Type	Maximum Length	Comments
Administering Partner	Picklist	15	The third-party company administering the exam. The entry is usually from the list of administering partners for the exam.
Candidate Name	Picklist	15	None.
Completion Date	Date	7	None.
Description	Text	255	None.
Exam Name	Picklist	15	None.
Grade Achieved	Text	50	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Score Achieved	Number	22	None.
Score Expires On	Date	7	None.
Registration Date	Date	7	This field displays the current date during record creation, but you can modify it during and after record creation.
Registration Number	Text	50	Exam registration numbers are usually unique.
Registration Status	Picklist	30	The default valid values are as follows: Registered, Passed, and Failed.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Exam Fields](#) (on page 403)

Financial Account Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial accounts in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial account data only.

Financial Account Field Name	Data Type	Maximum Length	Comments
Account Holder	Text	15	None
Account Holder: External System ID	Text	30	None
Balance	Currency	22	None
Balance as of	Date/Time	Not applicable	None
Branch	Text	15	None
Branch: External System ID	Text	30	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Exchange Date	Date/Time	Not applicable	None
External ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	50	The predefined field for the matching

Financial Account Field Name	Data Type	Maximum Length	Comments
			record.
Financial Account Number	Text	50	None
Financial Advisor	Text	15	None
Financial Advisor: External System ID	Text	30	None
Held Away	Boolean	1	None
Held Away Institution	Text	15	None
Held Away Institution: External System ID	Text	30	The external unique ID of the held away institution (business account) linked to this record.
Home Branch	Picklist	30	None
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Joint	Boolean	1	None
Open Date	Date	Not applicable	None
Owner: External System ID	Text	30	None
Parent Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Portfolio: External System ID	Text	30	None
Primary Account	Boolean	1	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Financial Account Holders Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial account holders into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial-account-holder data only.

Financial Account Holder Field Name	Data Type	Maximum Length	Comments
Business Account	Text	15	The predefined field for the matching record
Business Account: External System ID	Text	30	None
Currency Code	Picklist	20	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record
Financial Account Holder	Text	15	None
Financial Account Holder: External System ID	Text	30	None
Financial Account Holders Name	Text	50	The predefined field for the matching record
Household	Text	15	None
Household: External System ID	Text	30	None
Joined Date	Date	Not applicable	None
Owner	Text	15	None

Financial Account Holder Field Name	Data Type	Maximum Length	Comments
Owner: External System ID	Text	30	None
Primary Contact	Boolean	1	None
Role	Picklist	30	The predefined field for the matching record

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Financial Account Holdings Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial account holdings into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial-account-holdings data only.

Financial Account Holdings Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record

Financial Account Holdings Field Name	Data Type	Maximum Length	Comments
Financial Account Holdings Name	Text	50	The predefined field for the matching record
Financial Product	Text	15	The predefined field for the matching record
Financial Product: External System ID	Text	50	The external unique ID of the financial product linked to this record
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Performance	Text	22	None
Purchase Date	Date/Time	Not applicable	None
Purchase Price	Currency	22	None
Quantity	Number	22	None
Value	Currency	22	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Financial Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial plans in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

Financial Plan

The information in the following table is valid for Financial Plan only.

Financial Plan Field Name	Data Type	Maximum Length	Comments
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Financial Plan Field Name	Data Type	Maximum Length	Comments
Approved by Contact	Boolean	1	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record.
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Financial Plan Name	Text	50	The predefined field for the matching record.
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Portfolio	Text	15	None

Financial Plan Field Name	Data Type	Maximum Length	Comments
Portfolio: External System ID	Text	30	None
Sent to Contact	Boolean	1	None
Status	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Financial Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial products in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial product only.

Financial Product Field Name	Data Type	Maximum Length	Comments
Category	Picklist	30	None
Class	Picklist	30	None
Currency Code	Picklist	20	None
Current Price	Currency	20	None
Current Price Last Updated	Date/Time	Not applicable.	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Product ID	Text	50	None

Financial Product Field Name	Data Type	Maximum Length	Comments
Financial Product Name	Text	50	The predefined field for the matching record.
Financial Product Overview	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Integration ID	Text	30	None
MDM Product Hub ID	Text	50	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Parent Financial Product	Text	15	None
Parent Financial Product: External System ID	Text	50	The external unique ID of the parent financial product linked to this record.
Parent Financial Product: System ID	Text	50	Also known as the external unique ID.
Price Source	Text	50	Also known as the current price source.
Product Catalogue	Text	250	None
Product URL	Text	250	None
Sub-Class	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Financial Transactions Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial transactions in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial transactions only.

Financial Transactions Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record.
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Financial Product	Text	15	The predefined field for the matching record.
Financial Product: External System ID	Text	50	The external unique ID of the financial product linked to this record.
Financial Transaction Parent	Text	15	None
Financial Transaction Parent: External System ID	Text	50	The external unique ID of the financial product linked to this record.
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External Unique ID	Text	30	None
Quantity	Number	22	None
Transaction Date Time	Date/Time		None

Financial Transactions Field Name	Data Type	Maximum Length	Comments
Transaction ID	Text	50	The predefined field for the matching record.
Transaction Period	Text	50	None
Transaction Price	Currency	22	None
Transaction Source	Text	50	None
Transaction Type	Picklist	30	None
Value	Currency	22	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Insurance Property Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing insurance property data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for insurance property data only.

Insurance Property Field Name	Data Type	Maximum Length	Comments
Amount	Currency	22	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
External System ID	Text	50	None

Insurance Property Field Name	Data Type	Maximum Length	Comments
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Policy	Text	15	The predefined field for the matching record.
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record.
Sequence	Number	22	The predefined field for the matching record.
Type	Picklist	30	The predefined field for the matching record.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Inventory Audit Report Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing inventory audit reports into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Inventory Audit Report Field Name	Data Type	Maximum Length	Comments
Comments	Note	255	None
Completed Date	Date/Time	7	None
Inventory Period	Text	15	The reference field for holding the Inventory Period Object ID.

Default Inventory Audit Report Field Name	Data Type	Maximum Length	Comments
Reason	Picklist	30	None
Reported Date	Date/Time	7	None
Status	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Inventory Period Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing inventory periods into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Inventory Period Field Name	Data Type	Maximum Length	Comments
Active	Boolean	1	This field indicates whether the inventory period is active or inactive.
End Date	Date/Time	7	This field is empty if the inventory period is active.
Reconciled	Boolean	1	This field indicates whether the inventory period has been reconciled or not.
Start Date	Date/Time	7	The starting date of the inventory period.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Involved Party Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing involved party data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for involved party data only.

Involved Party Field Name	Data Type	Maximum Length	Comments
Claim	Text	15	The predefined field for the matching record.
Claim: External System ID	Text	50	None
Contact	Text	15	The predefined field for the matching record. The Contact field is a concatenation of the last name and first name of the contact.
Contact: External System ID	Text	30	None
Currency Code	Picklist	20	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Injury Description	Text	16350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Injury Summary	Text	250	None
Integration ID	Text	30	None
Involved Party Name	Text	50	None
Location	Picklist	30	None
Owner	Text	15	The owner of the record.
Owner: External System ID	Text	30	None
Role	Picklist	30	The predefined field for the matching

Involved Party Field Name	Data Type	Maximum Length	Comments
			record.
Role in Accident	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Lead Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing leads into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Lead Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Alias	Text	50	None
Annual Revenues	Currency	15	None
Approximate Income	Currency	15	This is the amount of the approximate annual income.
Associated Account	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Lead Edit page).
Associated Contact	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Lead Edit page).
Associated Deal Registration	Text	100	None
Associated Deal Registration: External ID	Text	50	None
Associated Opportunity	Not applicable	Not	It is currently not possible to import data into this field. Its value can only

Default Lead Field Name	Data Type	Maximum Length	Comments
		applicable	be set directly in the application (on the Lead Edit page).
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
Billing Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
Billing City	Text	50	None
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1286)).
Billing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1286)).
Billing Province	Text	30	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast.
Billing US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Billing Zip/Post Code	Text	50	None
Campaign	Not applicable	Not	This value is specified when using the Oracle CRM On Demand Lead Import

Default Lead Field Name	Data Type	Maximum Length	Comments
		applicable	Assistant. It is not possible to directly set values for the Campaign field in the import data.
Campaign External ID	Text	30	None
Cellular Phone #	Phone	40	None
Company	Text	100	None
Contact External ID	Text	30	None
Created By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Date of Birth	Date	Not applicable	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Email	Text	100	None
Estimated Close Date	Date	7	None
External Unique ID	Text	30	None
First Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Industry	Picklist	50	Oracle CRM On Demand does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. Alternatively, your company's Oracle CRM On Demand Administrator can create a custom Lead field that contains the valid values that you expect in your import

Default Lead Field Name	Data Type	Maximum Length	Comments
			<p>data. This allows you to import your data into that custom field instead of this field.</p> <p>Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications</p>
Integration ID	Text	30	None
Job Title	Text	75	None
Last Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Lead Currency	Text	20	None
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr./Ms.	Picklist	15	Default valid values: Miss., Mr., Ms., Mrs., and Dr.
Never Email	Check box	Not applicable	None
Next Step	Text	250	None
Number of Employees	Integer	15	None
Opportunity External ID	Text	30	None
Owner	Email	50	<p>File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>

Default Lead Field Name	Data Type	Maximum Length	Comments
Potential Revenue	Currency	15	None
Primary Phone #	Phone	40	None
Product Interest	Text	100	None
Profession	Text	50	This is the specified profession or occupation.
Rating	Picklist	30	Default valid values: A, B, C, and D
Reassign Lead Owner	Not applicable	Not applicable	This value is specified for all leads in a specific import when using the Oracle CRM On Demand Lead Import Assistant. It determines whether the imported leads are assigned to new owners based on Lead Assignment Rules defined for your company.
Referred By	Picklist	101	None
Sales Person	Picklist	30	None
Sales Person External ID	Text	30	None
Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, and Other
Status	Not applicable	Not applicable	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values and they must match the business logic.
Web Site	Text	100	None
Work Fax #	Phone	40	None

Related Topics

See the following topics for related information:

- [Leads Fields](#) (on page 170)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

MDF Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing market development fund (MDF) requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Amount PreApproved	Number	22	The total amount that the brand owner approved for the marketing activity.
Amount Requested	Number	22	The total amount that the partner is requesting for the marketing activity.
Approval Status	Varchar	30	The current approval status for the MDF request.
Approver	Varchar	15	The name of the current approver.
Campaign	Varchar	15	The campaign with which the MDF is associated.
Category	Varchar	30	The category to which the MDF request belongs.
Claim Decision Date	Date	7	The date on which a decision was made for the claim.
Claim Status	Varchar	30	Indicates the status of the MDF claim.
Description	Varchar	250	None
Due Date	Date	7	The date by which the request must be processed.
End Date	UTC Date Time	7	The date and time by which the marketing activity ends.
Expiration Date	UTC Date Time	7	The date after which the MDF request is no longer valid.
Fund	Varchar	15	The name of the fund associated with the MDF request.
Last Approved By	Varchar	15	The name of the person who most recently approved the request.
MDF Request Currency	Varchar	20	None

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Marketing Purpose	Varchar	30	The marketing reason for the MDF request.
Owner	Varchar	15	The owner of the record.
Owner Partner Account	Varchar	15	The partner account for which the owner works.
Partner Program	Varchar	15	The partner program with which the request is associated.
Pre-Approval Date	Date	7	The date and time that the MDF request was preapproved.
Principal Partner Account	Varchar	15	The partner company that is leading the effort on the MDF request.
Reason Code	Varchar	30	The reason why a special pricing request was returned or rejected.
Region	Varchar	30	The region for which the MDF request is being made.
Request Date	Date	7	The date and time that the MDF request was created.
Request Name	Varchar	50	The name of the MDF request.
Start Date	UTC Date Time	7	The date and time when the marketing activity starts.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	UTC Date	7	The date and time when the request was submitted.
Total Claim Amount Approved	Number	22	The total claim amount that was approved for the partner.
Total Claim Amount Requested	Number	22	The total claim amount that was requested by the partner.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Message Response Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing message responses into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Message Response Field Name	Data Type	Maximum Length	Comments
Account	Text	15	None
Activity	Text	15	None
Comments	Text	250	None
Contact	Text	15	None
Enable Followup	Boolean	1	None
End Time	Date/Time	7	None
External Unique ID	Text	30	None
Plan	Text	15	None
Plan Item	Text	15	None
Response	Text	30	None
Section	Text	100	None
Sequence Number	Numeric	22	None
Start Time	Date/Time	7	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Adjusting Message Responses](#) (on page 136)

Messaging Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plans into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type](#)

[Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	This field describes the targeted audience for this message plan, for example, cardiac surgeons.
Code	Text	50	This field tracks messaging plans in different Row IDs. For example, if you revise a messaging plan, this field creates a copy of the messaging plan with an incremented version number.
Disclosure Mandatory	Boolean	1	When this field is selected, a disclosure message is displayed.
Enable Followup	Boolean	1	None
Expiration Date	DateTime	7	The date on which the messaging plan ends.
External Unique ID	Text	30	None
Lock Sequence	Boolean	1	This field locks the messaging plan, which prevents users from changing the sequence, or removing messages from a messaging plan.
Name	Text	200	The name of the messaging plan or the personalized messaging plan.
Priority	Number	22	None
Release Date	DateTime	7	The release date of the messaging plan.
Segment	Text	50	This field describes the market segment; that is, the group of accounts, to which the message plan is targeted, for example, tertiary care hospitals. It shows the recommended messaging plans to sales representatives when they are planning calls.
Skin	Text	30	When the messaging planner is opened for editing or previewing, the layout of the messaging plan is also displayed.

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments
Start Date	DateTime	7	None
Status	Picklist	30	The default, valid values for this field are: Approved, In Progress, Rejected, Released, Submitted.
Type	Text	30	The default, valid values for this field are: Product Launch and Targeted Messaging.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Messaging Plans](#) (on page 495)

Messaging Plan Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plan items into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Messaging Plan Item Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	None
Description	Text	255	None
Disclosure Message	Boolean	1	None
Display Name	Text	100	None
Name	Text	100	None

Default Messaging Plan Item Field Name	Data Type	Maximum Length	Comments
Parent Messaging Plan	Text	30	A messaging plan is made up of a number of messaging plan items. The Parent Messaging Plan field is the messaging plan to which a messaging plan item belongs. The Parent Messaging Plan field links to the name field of a messaging plan record.
Rating	Picklist	30	None
Sequence Number	Number	22	None
Solution Name	Text	30	None
Speaker Notes	Text	2000	None
Status	Picklist	30	None
Synopsis	Text	2000	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Messaging Plan Items](#) (on page 501)

Messaging Plan Item Relation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plan item relations into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Messaging Plan Item Relation Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	None
Description	Text	255	None

Default Messaging Plan Item Relation Field Name	Data Type	Maximum Length	Comments
Display Name	Text	100	None
Name	Text	100	None
Parent Messaging Plan	Text	15	None
Rating	Picklist	30	None
Sequence Number	Number	22	None
Solution Name	Text	30	None
Status	Picklist	30	None
Synopsis	Text	2000	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Messaging Plan Item Relations](#) (on page 506)

Note Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing notes into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Note Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Account Name	Text	255	None
Campaign External ID	Text	30	None
Campaign Name	Text	255	None

Default Note Field Name	Data Type	Maximum Length	Comments
Contact External ID	Text	30	None
Contact Name	Text	255	None
Description	Text	16, 035	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Opportunity External ID	Text	30	None
Opportunity Name	Text	100	None
Private	Check box	Not applicable	None
Service Request External ID	Text	30	None
Service Request Number	Number	15	None
Subject	Text	30	Required field by default.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Objective Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing objectives into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Objective Field Name	Data Type	Maximum Length	Comments
Account Name	Text	15	The account name associated with the defined objective.
Contact Name	Text	15	The contact name associated with the defined objective.

Default Objective Field Name	Data Type	Maximum Length	Comments
Currency	Text	20	The currency used for the monetary values of the objective.
Description	Text	2000	The description field for the defined objective.
Exchange Date	Date/Time	7	The date on which the exchange rate applies to the currency.
Objective Name	Text	30	None
Objective Revenue	Text	22	Target revenue for the objective.
Objective Target	Number	22	The Objective Target field is a quantity of sales units, prescriptions, sales calls, and so on. This quantity is defined by the Objective Units field.
Objective Units	Picklist	30	The Objective Units field defines the quantity in the Objective Targets field.
Parent Objective	Text	15	If the defined objective is associated with a parent objective, this field enables both objectives to be combined.
Period	Text	15	This period value corresponds to the criteria that the user enters when setting up forecasts in Oracle CRM On Demand.
Plan Name	Text	15	The business plan name associated with this particular objective (optional).
Product Name	Text	15	The product name associated with the objective.
Status	Picklist	30	The status of the objective.
Target Audience	Text	2000	This is the group of individuals to which the objective is applied.
Type	Picklist	30	The type of objective. The customer sets the values.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Objectives](#) (on page 253)

Opportunity Contact Role Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing roles for contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Contact Role Field Name	Data Type	Maximum Length	Comments
Buying Role	Picklist	39	Default valid values: User, Evaluator, Approver, Decision Maker, User and Evaluator, User and Approver, User and Decision Maker, Evaluator and Approver, Evaluator and Decision Maker, Unknown
Contact External ID	Text	30	None
Contact Name	Text	255	None
Opportunity External ID	Text	30	None
Opportunity Name	Text	100	None
Primary	Check box	Not applicable	None

Related Topics

See the following topics for related information:

- [Contact Fields](#) (on page 206)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunities into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Account	Text	100	Required field by default.
Account External ID	Text	30	None
Account Location	Text	50	None
Close Date	Date	7	Required field by default.
Dealer	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Expected Revenue	Currency	15	Cannot be imported. Value that is calculated based on potential revenue field multiplied by value in Probability field.
External Unique ID	Text	30	None
Forecast	Check box	Not applicable	None
Integration ID	Text	30	None
Lead Source	Picklist	30	None
Make	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Name	Text	100	None
Next Step	Text	250	None
Opportunity Currency	Picklist	15	Read-only.
Opportunity Currency	Text	20	None
Opportunity Name	Text	100	Required field by default.

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Owner	Email	50	<p>File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Priority	Picklist	30	Default valid values: Low, Medium, High
Probability %	Picklist	3	<p>Default valid values: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100</p> <p>NOTE: This field should always be exposed in the layout. If it is hidden, unexpected results occur.</p>
Product Interest	Text	100	Specific to Oracle CRM On Demand Financial Services Edition.
Reason Won/Lost	Picklist	30	Default valid values: Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision, Other
Reassign Opportunity	Check box	Not applicable	None
Revenue	Currency	15	None
Sales Stage	Picklist	50	<p>Required field by default.</p> <p>This field behaves differently from most fields; it will not add picklist values that do not match even if you specify that during the import process. The import data must match the valid values for this field. If you want to capture picklist values from your CSV file that do not match the default picklist values, add them to the application before importing your data. Otherwise, the entire record is rejected. Default valid values are: Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won, Closed/Lost.</p>
Source Campaign	Picklist	30	The campaign that generated the opportunity.

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Status	Picklist	30	Default valid values are Pending, Lost, and Won.
Territory	Text	50	None
Total Asset Value	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Premium	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Type	Picklist	30	None
Year	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.

Opportunity Product Revenue Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunity product records into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
# of Periods	Integer	3	Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency specified (in the Frequency field. For example, if you have weekly recurring revenue you can track revenue for up to five years.
Asset Value	Currency	15	None
Contact Full Name	Text	255	None
Contract	Picklist	30	None
Description	Text	250	Limitation is 250 characters.
External Unique ID	Text	30	None

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
Forecast	Check box	Not applicable	None
Frequency	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Integration ID	Text	30	None
Opportunity External ID	Text	30	None
Opportunity Name	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner External ID	Text	30	None
Premium	Currency	15	None
Probability %	Picklist	22	None
Product External ID	Text	30	None
Product Name	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Purchase Date	Date	7	None
Purchase Price	Currency	15	None
Quantity	Number	15	None
Serial #	Text	100	None
Ship Date	Date	7	None
Start/Close Date	Date	7	None
Status	Text	30	None
Type	Picklist	30	None

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
Warranty	Picklist	30	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Partner Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing partners into Oracle CRM On Demand. This information supplements the guidelines in the topic, [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following information before importing partners.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Partner Field Name	Data Type	Maximum Length	Comments
# Physicians	Number	22	This is specific to Oracle CRM On Demand Life Sciences Edition.
Account Partner	Text	1	None
Annual Revenues	Currency	15	None
Billing Address 1	Text	200	None
Billing Address 2	Text	100	None
Billing Address 3	Text	100	None
Billing City	Text	50	None
Billing Country	Picklist	30	None
Billing PO /Sorting Code	Text	30	None
Billing Province	Text	50	None
Billing US State	Picklist	2	The value for this field is the standard two-letter abbreviation for U.S. states, for example, <i>IA</i> for Iowa.
Billing ZIP/Post Code	Text	30	None
Call Frequency	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You

Default Partner Field Name	Data Type	Maximum Length	Comments
			can edit this picklist.
Channel Account Manager	Text	50	None
Compliance Review Date	UTC Date Time	7	This is the date that the Compliance Status is due for review.
Compliance Status	Picklist	30	You can edit this picklist.
Description	Text	255	None
Expertise	Text	30	You can edit this picklist.
External Unique ID	Text	30	None.
Furigana Name	Text	100	None.
HIN	Text	30	Health Industry Number (HIN).
Industry	Picklist	50	This picklist is read-only. The default values for this picklist are: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications.
Influence Type	Picklist	30	You can edit this picklist.
Last Assignment Completion Date	UTC Date Time	7	None
Last Assignment Submission Date	UTC Date Time	7	None
Last Call Date	UTC Date Time	7	None
Location	Text	50	None
Main Fax #	Phone	40	None
Main Phone #	Phone	40	None
Market Potential	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Segment	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Share	Number	Not applicable	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist. This number is between zero (0) and 100.

Default Partner Field Name	Data Type	Maximum Length	Comments
Maximum Number of Users	Integer	Not applicable	None
Number of Employees	Integer	22	None
Originating Partner Account	Picklist	100	This picklist is read-only. This picklist contains the value of the valid partner.
Owner	Text	50	This field contains the name of the current owner of this record.
Owner Partner Account	Picklist	100	This picklist is read-only.
Partner Currency	Picklist	15	This picklist is read-only. This value must match the existing value for the current partner currency.
Partner Level	Picklist	30	You can edit this picklist.
Partner Name	Text	100	This is the partner's name.
Partner Organization Status	Picklist	30	This field indicates if the partner is an active or an inactive Partner Relationship Partner (PRM) organization. When this is set to active, a book is automatically created for the partner organization. Their users are automatically added to the book. This book is only used when relating partners to each other in the Partner Relationship Related Item under the Partner Record field. You can edit this picklist.
Price List	Picklist	50	This picklist is read-only. The default values for this picklist are the names of the price lists.
Primary Partner Type	Picklist	30	This picklist is read-only. The default values in this picklist are the partner types associated with the partner.
Principal Partner Account	Picklist	100	This picklist is read-only. The default value for this picklist is the value of the partner.
Priority	Picklist	30	You can edit this picklist.
Public Company	Check Box	Not applicable	None.
Ranking	Number	22	None.

Default Partner Field Name	Data Type	Maximum Length	Comments
Reassign Account	Check box	Not applicable	This field indicates that the account should be reassigned. When imported, triggers automatic assignment rules for this account record, if your company administrator or manager has set that feature up.
Reference	Check Box	Not applicable	This field should be set to the checked state if this account agreed to be a reference that you can give out to prospects.
Reference as of	Date	Not applicable	None
Region	Picklist	25	You can edit this picklist. The default valid values are East, West, and Central.
Route	Picklist	30	You can edit this picklist.
Shipping Address 1	Text	200	None
Shipping Address 2	Text	100	None
Shipping Address 3	Text	50	None
Shipping City	Text	50	None
Shipping Country	Picklist	30	None
Shipping PO Box/Sorting Code	Text	30	None
Shipping Province	Text	50	None
Shipping US State	Picklist	2	The value for this field is the standard two-letter abbreviation for U.S. states, for example, <i>IA</i> for Iowa.
Shipping ZIP/Post Code	Text	30	None.
Source Campaign	Picklist	100	This picklist is read-only. The default value for this picklist is the name of the source campaign that generated the account .
Status	Picklist	30	You can edit this picklist.
Territory	Picklist	50	This picklist is read-only. The default field in this picklist is the name of the territory.
Web Site	Text	100	None.

Default Partner Field Name	Data Type	Maximum Length	Comments
YTD Revenue	Currency	22	This is specific to Oracle CRM On Demand Life Sciences Edition. This stands for Year To Date.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Plan Account Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Plan Account Field Name	Data Type	Maximum Length	Comments
Account	Picklist	15	The reference field for holding the Account Object ID.
Business Plan	Picklist	15	The reference field for holding the Business Plan Object ID.
Primary Plan Account	Boolean	1	Indicates whether the account is a primary account.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Plan Accounts](#) (on page 258)

Plan Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type](#)

[Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Plan Contacts Field Name	Data Type	Maximum Length	Comments
Business Plan	Picklist	15	The reference field holding the Business Plan Object ID.
Contact	Picklist	15	The reference field holding the Contact Object ID.
Primary Plan Contact	Boolean	1	Indicates whether the contact is the primary contact.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Plan Contacts](#) (on page 262)

Plan Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan opportunities into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Plan Opportunity Field Name	Data Type	Maximum Length	Comments
Opportunity	Text	15	The reference field for holding the Opportunity Object ID.
Business Plan	Text	15	The reference field for holding the Business Plan Object ID.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Plan Opportunities](#) (on page 265)

Policy Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing policies in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for policy data only.

Policy Field Name	Data Type	Maximum Length	Comments
Billing Status	Picklist	30	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Cancelled Date	Date	Not applicable	None
Company: External System ID	Text	30	None
Currency Code	Picklist	20	None
Effective Date	Date	Not applicable	None
Expiration Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Face Amount	Currency	22	None
Financial Account	Text	15	None

Policy Field Name	Data Type	Maximum Length	Comments
Financial Account: External System ID	Text	30	None
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Invoice Due Date	Date	Not applicable	None
Owner: External System ID	Text	30	None
Parent Policy	Text	15	None
Parent Policy: External System ID	Text	50	The external unique ID of the parent policy linked to this record.
Policy Number	Text	50	The predefined field for the matching record. This field is also known as the policy number field.
Policy Pay Method	Picklist	30	None
Policy Type	Picklist	30	None
Primary Agency	Text	15	None
Primary Agency: External System ID	Text	30	The external unique ID of the primary agency (business account is set to partner) linked to this record.
Primary Agent	Text	15	None
Primary Agent: External System ID	Text	30	The external unique ID of the primary agent (contact) linked to this record.
Producer Code	Text	50	None

Policy Field Name	Data Type	Maximum Length	Comments
Rate Plan	Picklist	30	None
Rate State	Picklist	30	None
Referral Source	Picklist	30	None
Status	Picklist	30	None
Sub Status	Picklist	30	None
Term	Text	50	None
Total Premium	Currency	22	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Policy Holder Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing policy holders in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for policy holder data only.

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Business Account Holder	Text	15	None
Business Account Holder: External System ID	Text	30	None
Company: External System ID	Text	50	None
Contact Holder	Text	15	None
Contact Holder: External Unique ID	Text	50	None
Currency Code	Picklist	20	None

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Household Holder	Text	15	None
Household Holder: External System ID	Text	30	None
Holder Percentage	Percent	22	None
Insured Type	Picklist	30	None
Integration ID	Text	30	None
Owner: External System ID	Text	30	None
Policy	Text	15	The predefined fields for the matching record
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record
Policy Holder Name	Text	250	The predefined fields for the matching record
Role	Picklist	30	The predefined fields for the matching record

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Portfolio Fields: Import Preparation

NOTE: This feature might not be available in your version of the application since it is not part of the standard application.

The following table contains specific information about setting up your CSV file before importing the portfolio accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Number	Text	100	None
Account Type	Picklist	30	Default valid values: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings, and Other.
Annual % Rate	Number	15	None
Cancelled/Sold Date	Date	7	None
Credit Limit	Currency	20	None
Effective Date	Date	7	None
Expiration Date	Date	7	None
External Unique ID	Text	30	None
Face Value	Currency	20	None

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Institution	Text	100	None
Institution Location	Text	50	None
Loan Amount	Currency	20	None
Maturity	Date	7	None
Premium	Currency	20	None
Primary Owner ID	Text	50	None
Product	Text	50	None
Purchase Date	Date	7	None
Revenue	Currency	20	None
Risk Class	Text	50	None
Status	Picklist	30	Default valid values: Active, Pending, Quote, Terminated, and Closed.
Term	Number	20	None
Term Unit	Picklist	20	Default valid values: Day, Week, Month, and

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
			Year.
Total Asset Value	Currency	20	None
Valuation Date	Date	7	None
Institution External ID	Text	30	Institution links to account.
Product External ID	Text	30	None

Related Topics

See the following topics for related information:

- [Portfolios](#) (on page 518)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Price List Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing price lists into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Price List Field Name	Data Type	Maximum Length	Comments
Currency	Varchar	20	The currency of the price list.
Description	Varchar	255	None
Effective From	UTC DateTime	7	The date from which the price list is effective.

Default Price List Field Name	Data Type	Maximum Length	Comments
Effective To	UTC DateTime	7	The date to which the price list is effective.
Owner	Varchar	15	The owner of the record.
Price List Name	Varchar	50	None
Status	Varchar	30	The current status of the price list, for example, In Progress, Published, and so on.
Type	Varchar	30	The type of price list.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Price List Line Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing price list line items into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Price List Line Item Field Name	Data Type	Maximum Length	Comments
Description	Varchar	255	None
Effective From	UTC DateTime	7	The date from which the price list is effective.
Effective To	UTC DateTime	7	The date to which the price list is effective.
List Price	Number	22	The price of the product.
Owner	Varchar	15	The owner of the record.
Price List	Varchar	15	The name of the price list with which this line item is associated.

Default Price List Line Item Field Name	Data Type	Maximum Length	Comments
Price Type	Varchar	30	The type of price on the line item, for example, standard.
Product	Varchar	15	The product of the price line item.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Product Category Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing product category fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Campaign Recipients Field Name	Data Type	Maximum Length
Category Name	Text	100
Parent Category	Text	100
External Unique ID	Text	30
Parent Product Category External ID	Text	30
Description	Text	16,350

Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Product Field Name	Data Type	Maximum Length	Comments
Body	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition. Default valid values: Coupe, Salon, Cabriolet, Hatchback, Wagon, Sedan
Category	Picklist	30	Default valid values: Clothing, Tractor, SUV, Interior, Heavy Truck, Exterior, Electrical, DriveTrain, Light Truck, Passenger Car
Controlled	Check box	Not applicable	None
Dealer Invoice Price	Currency	15	Specific to Oracle CRM On Demand Automotive Edition.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Door	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition. Default valid values: 3 Door, 2 Door, 4 Door
Engine	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Lot # Tracking	Check box	Not applicable	None
Make	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Orderable	Check box	Not applicable	None
Parent Product	Text	100	None
Part #	Text	50	None
Price Type	Picklist	30	None
Product Category	Text	100	None

Default Product Field Name	Data Type	Maximum Length	Comments
Product Currency	Currency	15	None
Product Name	Text	100	Required field by default.
Product Type	Picklist	30	None
Revision	Picklist	30	None
Serialized	Check box	Not applicable	None
Status	Picklist	30	None
Sub Type	Picklist	30	None
Therapeutic Class	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition.
Transmission	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Trim	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Type	Picklist	30	None
Year	Number	50	Specific to Oracle CRM On Demand Automotive Edition.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Sample Disclaimer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample disclaimers into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Sample Disclaimer Field Name	Data Type	Maximum Length	Comments
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Default Sample Disclaimer Field Name	Data Type	Maximum Length	Comments
Comments	Text	255	This field provides supplementary information on the disclaimer field.
Number	Text	15	None
Disclaimer Text	Text	500	This is the disclaimer text.
End Date	Date/Time	7	The disclaimer expiration date.
Start Date	Date/Time	7	The disclaimer activation date.
Status	Picklist	30	The values for this field are: Active, Inactive, and Expired.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Sample Inventory Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample inventories into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Sample Inventory Field Name	Data Type	Maximum Length	Comments
Audit ReportID	Text	15	None
Inventory Period	Text	15	The reference field pointing to the Inventory Period Object ID.
Last Physical Count	Number	22	None
Lot#	Text	15	None
Opening Balance	Number	22	None
Physical Count	Number	22	None
Sample	Text	15	The reference field pointing to the sample product of this inventory.

Default Sample Inventory Field Name	Data Type	Maximum Length	Comments
System Count	Number	22	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Sample Inventory](#) (on page 451)

Sample Lot Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample lots into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Sample Lot Field Name	Data Type	Maximum Length	Comments
Cutoff Date	Date	7	This date is calculated. The calculation is based on the expiration date minus the value provide in the Short Days field. of the short days. For example, if the expiration date is January 31 and the value in the Short Days field is 30, Cutoff Date is January 1. This indicates that the sample lot must be used in the immediate future or to return them to the head office.
Description	Text	255	The lot description.
Expiration Date	Date	7	The expiration date of the sample lot.
Inventory By Lot	Boolean	1	This field indicates whether the inventory is tracked at the lot level or product level.
Lot#	Text	100	The lot name.
Orderable	Boolean	1	This field indicates whether the lot can be ordered.

Default Sample Lot Field Name	Data Type	Maximum Length	Comments
Product Level	Number	22	None
Sample	Text	15	The product name.
Short Days	Number	22	The number of lead days.
Start Date	Date	7	The sample lot start date.
UoM	Text	30	The unit of measure.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [Sample Lots](#) (on page 486)

Sample Transaction Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample transactions into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Sample Transaction Field Name	Data Type	Maximum Length	Comments
# of Packages Sent	Number	22	The number of packages being sent when sample transactions are transferred out.
# of Packages Received	Number	22	The number of packages that were received when sample transactions were transferred in.
Adjustment Reason	Picklist	30	The default values for this field are: Human Error, Theft, Initial Count, Lost, Found and Request.
Comments	Text	255	The description field.

Default Sample Transaction Field Name	Data Type	Maximum Length	Comments
Date	Date/Time	7	The date of the transaction.
Expected Arrival Date	Date/Time	7	None
Expected Delivery Date	Date/Time	7	None
From Transaction	Text	15	None
Inventory Period: Start Date	Date/Time	7	None
Inventory Period: End Date	Date/Time	7	None
Invoice #	Text	15	None
Name	Text	50	None
ParentTxn	Text	15	None
Received Date	Date/Time	7	None
Root Transaction	Text	15	None
Status	Picklist	30	The default values are: In Progress, In Transit, Adjusted, Processed, and Processed with Discrepancies.
Sent Date	Date/Time	7	None
Tracking #	Text	15	None
Transfer To	Text	15	None
Type	Picklist	30	The default values are: Transfer In, Transfer Out, Sample Lost, Inventory Adjustment, and Disbursement.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Service Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing service requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Service Request Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Area	Picklist	30	Default valid values: Product, Installation, Maintenance, Training, and Other
Cause	Picklist	30	Default valid values: Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Closed	Time	Date/Time	None
Contact	Text	255	None
Contact External ID	Text	30	None
Dealer	Picklist	100	Oracle CRM On Demand Automotive Edition
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
External Unique ID	Text	30	None
Opened Time	Date/Time	7	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to

Default Service Request Field Name	Data Type	Maximum Length	Comments
			the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Principal Partner Account	Varchar	15	None
Priority	Picklist	30	Default valid values: 1-ASAP, 2-High, 3-Medium, 4-Low
Product	Picklist	100	None
Reassign Owner	Check box	Not applicable	None
Servicing Dealer	Text	70	Oracle CRM On Demand Automotive Edition
Source	Picklist	30	Default valid values: Phone, Web, Email, Fax
SR Currency	Text	20	None
SR Number	Text	64	None
Status	Picklist	30	Default valid values: Open, Pending, Closed, Open - Escalated, Cancelled
Subject	Text	250	None
Type	Picklist	30	Default valid values: Question, Issue, Enhancement Request, Other
Vehicle	Text	100	None

Related Topics

See the following topics for related information:

- [Service Request Fields](#) (on page 276)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Signature Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing signatures into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Signature Field Name	Data Type	Maximum Length	Comments
Activity ID	Text	15	None
Contact First Name	Text	50	None
Contact Last Name	Text	50	None
Disclaimer Text	Text	500	None
Header Text	Text	800	None
Sales Rep First Name	Text	50	None
Sales Rep Last Name	Text	50	None
Signature Control	Text	16000	This field holds the signature x and y coordinates.
Signature Date	Date	7	None

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Solution Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing solutions into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Solution Field Name	Data Type	Maximum Length	Comments
External Unique ID	Text	30	None
FAQ	Text	250	None
Integration ID	Text	30	None

Default Solution Field Name	Data Type	Maximum Length	Comments
Product Category	Picklist	100	None
Published	Picklist	1	Default valid values are Y and N. These values must be in English, regardless of your language settings.
Service Request Count	Integer	22	None
Solution Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Solution Details	Text	16,000	None
Solution Rating	Number	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Status	Picklist	30	Default valid values: Draft, Approved, Obsolete
Title	Text	100	Required field by default.

Related Topics

See the following topics for related information:

- [Solution Fields](#) (on page 284)
- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Special Pricing Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing special pricing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Special Pricing Product Field Name	Data Type	Maximum Length	Comments
Authorized Cost	Number	22	The partner's price that is under negotiation for the special pricing request.

Default Special Pricing Product Field Name	Data Type	Maximum Length	Comments
Competitor Name	Varchar	100	The name of the competitor for the request.
Competitor Partner	Varchar	100	The name of the competing partner.
Competitor Product	Varchar	100	The name of the competitor's product.
Competitor Product Price	Number	22	The price of the competitor's product.
Currency	Varchar	20	None
Description	Varchar	250	None
MSRP	Number	22	The manufacturer's suggested retail price (MSRP) in the currency used.
Other Competitive Information	Varchar	250	Any other information regarding competitive product offerings, for example, special price justification, and so on.
Product	Varchar	15	The name of the product for the special pricing request.
Purchase Cost	Number	22	The price that the partner originally paid to purchase the product.
Quantity	Number	22	The expected quantity of products that will be sold under this request.
Requested Cost	Number	22	The reduced price that the partner requested.
Requested Resale Price	Number	22	The resale price at which the partner wanted to sell the product.
SP Request	Varchar	15	The special pricing request that this special pricing product is associated with.
Suggested Resale Price	Number	22	The resale price suggested by the brand owner.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Special Pricing Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing special pricing requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Approval Status	Varchar	30	The approval status for the special pricing request.
Approver	Varchar	15	The name of the approver.
Authorized Date	UTC Date Time	7	The date and time when the special pricing request was approved.
Claim Decision Date	Date	7	The date on which a decision was made for the claim.
Claim Status	Date	7	The status of the special pricing claim.
Currency	Varchar	20	The currency of the special pricing request.
Deal Registration	Varchar	15	The deal registration that is associated with the special pricing request.
Description	Varchar	15	None
Due Date	Date	7	The date by which the request must be processed.
End Customer	Varchar	15	The customer for the request. If the request is associated with an opportunity, then you can select opportunity account.
End Date	UTC Date	7	The date and time after which the special pricing is no longer effective.
Fund	Varchar	15	The name of the fund associated with the special pricing request.
Last Approved By	Varchar	15	The name of the person who most recently approved the request.
Opportunity	Varchar	15	The opportunity to which the request is related.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Originating Partner Account	Varchar	15	The partner who originated the special pricing request.
Owner	Varchar	15	The record owner.
Owner Partner Account	Varchar	15	The partner account for which the owner works.
Partner Program	Varchar	15	The partner program with which the request is associated.
Principal Partner Account	Varchar	15	The partner company that is leading the effort on the special pricing request.
Reason Code	Varchar	30	The reason why a special pricing request was returned or rejected.
Request Date	Date	7	The date and time that the special pricing request was created.
Request Name	Varchar	50	The name of the request.
Start Date	UTC Date Time	7	The date and time from which the special pricing starts.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	UTC Date Time	7	The date and time that the request was submitted.
Total Amount Authorized	Number	22	The total amount that is being authorized.
Total Amount Requested	Number	22	The total amount that was requested by the partner.
Total Claim Amount Approved	Number	22	The total claim amount that was approved for the partner.
Total Claim Amount Req.	Number	22	The total claim amount that is requested by the partner.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Task Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and a task into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Task Contact Field Name	Data Type	Maximum Length
Contact Full Name	Text	60
Contact External ID	Text	30
Task External ID	Text	30

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Task User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and a task into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Task User Field Name	Data Type	Maximum Length
User ID	Text	50
Task External ID	Text	30
User External ID	Text	30

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

Transaction Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing transaction items into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Transaction Item Field Name	Data Type	Maximum Length	Comments
Description	Text	250	The transaction item description.
Inventory Period	Text	15	None
Line Number	Number	22	The unique number associated with the transaction header record.
Lot#	Text	15	The reference field for holding the Sample Lot ID.
Quantity	Number	22	The number of samples associated with the transaction item.
Sample	Text	15	The name of the sample that is provided with the transaction item. You must document all samples.
Shipped Quantity	Number	22	The number of samples that were shipped as a transaction item.
Transaction#	Text	15	The reference field for holding the Sample Transaction ID.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)

User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing users into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines](#)

for [Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default User Field Name	Data Type	Maximum Length	Comments
Alias	Text	50	Required field by default.
User Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
User Address 2, 3	Text	100	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1286).
User City	Text	50	None
User Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1286)).
User PO Box/Sorting Code	Text	30	None
User Province	Text	50	For Canada, see About Countries and Address Mapping (on page 1286). However, this is not a picklist field.
User US State	Picklist	2	For the list of valid US state values, see About Countries and Address Mapping (on page 1286).
User Zip/Post Code	Text	30	None
Cellular Phone #	Phone	40	None
Currency	Text	50	This field is set at the company level, and, consequently, you cannot import this field or edit its picklist values.
Department	Text	75	None
Division	Text	75	None

Default User Field Name	Data Type	Maximum Length	Comments
Email	Text	50	Required field by default.
Email Temporary Password When I Click Save	Check box	Not applicable	If you select this check box and save, an email with a temporary password is sent to the user.
Employee Number	Number	30	None
External Unique ID	Text	30	Contains the External ID of the imported record.
First Name	Text	50	Required field by default.
Fund Approval Limit	Number	22	Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition.
Integration ID	Text	30	Identifier used for integrating with external systems.
Language	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the standard valid values.
Last Name	Text	50	Required field by default.
Locale	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Middle Name	Text	50	None
Mr./Ms.	Picklist	15	None
Reports To	Text	Not applicable	This is a calculated field, based on the manager's first and last name.
Reports To External ID	Text	30	None
Role	Picklist	50	Required field by default. Default valid values: Administrator, Executive, Field Sales Rep, Inside Sales Rep, Sales & Marketing Manager, Service Manager, Service Rep.
Status	Picklist	30	Required field by default. Default valid values: Active, Inactive.
Time Zone	Text and number	100	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.

Default User Field Name	Data Type	Maximum Length	Comments
Work Fax #	Phone	40	None
Work Phone #	Phone	40	Required field by default.

Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 1319)
- [Importing Your Data](#) (on page 1448)
- [User Fields](#) (on page 1111)

Vehicle Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle contact fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Product Category Field Name	Data Type	Maximum Length
Serial Number	Text	100
Product Name	Text	100
Contact Full Name	Text	60
Contact External ID	Text	30
Vehicle External ID	Text	30
Primary	Check box	Not applicable

Vehicle Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 1319). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

NOTE: This section is specific to Oracle CRM On Demand Automotive Edition.

Default Vehicle Field Name	Data Type	Maximum Length
VIN	Text	100
Make	Text	30
Model	Text	30
Year	Text	22
Trim	Text	30
Door	Text	30
Exterior Color	Text	30
External Unique ID	Text	30
Owner External ID	Text	30
Account External ID	Text	30
Product External ID	Text	30
Selling Dealer External ID	Text	30
Service Dealer External ID	Text	30
Product Type	Text	30
Selling Dealer	Text	100
Status	Text	255
Account	Text	100
Account Type	Text	255
Contact	Text	255
License Number	Text	30
License State	Text	10
License Expiry	Date	32
Transmission	Text	30
Account Site	Text	50
Status	Text	30

Default Vehicle Field Name	Data Type	Maximum Length
Location	Text	30
Used/New	Text	30
Engine	Text	30
MSRP	Currency	25
Dealer Invoice Price	Currency	25
Owned By	Text	30
Modified: Date External	Date/Time	32
Modified By	Text	255
Vehicle Currency	Text	30
Interior Color	Text	30
Warranty Type	Text	30
Warranty Start Date	Date	32
Warranty End Date	Date	32
Current Mileage	Number	16
Mileage Reading Date	Date	32
Product Name	Text	100
Type	Text	255
Body	Text	30
Description	Text	250
Owner	Email	50
Created: Date External	Date/Time	32
Row Id	Id	15
Integration ID	Text	30
Account Id	Id	15
Account Integration Id	Text	30
Custom Object <i>N</i>	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30

Default Vehicle Field Name	Data Type	Maximum Length
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Picklist 6	Text	30
Indexed Number	Number	16
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Long Text	Text	255
Indexed Short Text 1	Text	100
Indexed Short Text 2	Text	100
Indexed Checkbox	Boolean	1
Product Category	Text	100
Part #	Text	50
Purchase Date	Date	32
Purchase Price	Currency	25
Quantity	Number	16
Ship Date	Date	32
Install Date	Date	32
Expiration Date	Date	32
Notify Date	Date	32
Contract	Text	30

Import Assistant

The following topics describe how to use the Import Assistant to import your company data into Oracle CRM On Demand:

- [Importing Your Data](#) (on page 1448)
- [Reviewing Import Results](#) (on page 1452)
- [Example of Import Results Email and Log File](#) (on page 1453)

Importing Your Data

Before you begin. Prepare your CSV files and add any necessary fields or picklist values to the application. For more information, see [Preparing for Data Importing](#) (on page 1324). Before importing data, you can determine which method of data importing best suits your requirements by reviewing the supporting documentation on My Oracle Support.

After you have prepared your data for importing, access the Import Assistant, and perform the import. To ensure that the Import Assistant processes all import requests equally, each import request is split into one or more child requests of 100 records. Child requests from different import requests are processed simultaneously, so that no import request is waiting for another request to complete before it is picked up in the queue. The processing time for an import request is updated continuously and reflects the progress of the child requests in the queue.

TIP: Make sure that your import CSV file is set up correctly by doing a test import of five records. It is much easier to correct mistakes for five imported records than for the full number in your import file.

To import records

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section, click the Import and Export Tools link.
- 3 In the Import Data section, select the record type you want to import from the drop-down menu.
- 4 Click the Launch button.

This starts the Import Assistant.

- 5 For Step 1:

NOTE: The following options are available depending on the record you wish to import.

- a Select how you want the Import Assistant to identify matching records.

The Import Assistant uses an external unique ID, which is a unique external ID field that is imported from another system, Oracle CRM On Demand row ID, and Oracle CRM On Demand pre-defined fields. These pre-defined fields, such as Account Name and Location, do not have IDs.

For information on how duplicate records are defined, see [About Record Duplicates and External IDs](#) (on page 1302).

- b Select what you want the Import Assistant to do if it finds a duplicate unique record identifier in Oracle CRM On Demand. Your choices are to not import duplicate records, to overwrite existing records or to create additional records.

NOTE: This option is not available in Task, Appointments, Notes, Account Teams, Contact Teams and Opportunity Contact Roles.

- c Select the action you want the Import Assistant to follow if the imported record's unique record identifier does not match an existing record in Oracle CRM On Demand.

NOTE: This option is not available in Task, Appointments and Notes. If you select Overwrite Records and Don't Create New Record in the previous option, this results in the record being updated.

- d** Select how you want to handle picklist values in your CSV file that do not match the values in the application.

The Import Assistant can either add the new value to the picklist or will not import the field value.

NOTE: This is not available when importing Notes or if the user's language is different than the company's default language. This is also not applicable to multi-select picklists. The multi-select picklists can only be imported if the value in the CSV file exists in the application.

- e** Decide if the Import Assistant should create a new record for missing associations (related records) in your data file.

NOTE: This option is only available when importing Accounts or Contacts.

- f** Select the date/time format used in the CSV file.

For more information, see [Field Type Guidelines for Importing Data](#) (on page 1319).

- g** Verify that the file encoding selection is Western.

NOTE: Do not change this setting unless you are certain another encoding method is used. The default, Western, applies to most encoding systems in Europe and North America.

- h** Select the type of CSV delimiter used in your file: comma or semi-colon.

- i** In the Error Logging drop-down list, select what you want Oracle CRM On Demand to log: All messages, Errors and Warnings, or Errors Only.

- j** Select the CSV file whose data you want to import.

- k** Select the check box if you want data files to be processed sequentially.

NOTE: Choosing to process data files sequentially ensures that when an import request is submitted, the child import requests are always processed in sequence. It also ensures that CSV file dependencies are maintained.

- l** Select the check box if you want to disable auditing while importing data and if you do not want to generate any audit trail records while importing data.

NOTE: You cannot disable this auditing setting if you are importing the User record type. This option is available only if the Manage Record Auditing for Imports privilege is enabled for your role. Selecting this check box might improve import performance, depending on the record types that you want to import and the number of audited fields that you would otherwise decide to audit for those record types.

6 For Step 2:

- a** Follow the instructions for validating your file, if necessary.

- b** Select a field mapping file, if available.

- Field mapping files (.map) contain the pairing of fields in your CSV file with existing Oracle CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.

- For Step 3, map the fields in your file to Oracle CRM On Demand fields. At a minimum, you need to map all required fields to column headers in the CSV file.

The Import Assistant lists the column headers from your import CSV file next to a drop-down list showing all the fields in that area in Oracle CRM On Demand, including custom fields you added.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

If you selected a .map file, verify that the fields map correctly. Custom fields created since you ran the previous import might need to be mapped.

For information about external IDs, see [About Record Duplicates and External IDs](#) (on page 1302).

CAUTION: If you have selected the wrong file to import, click **Cancel** to change selections. At this point, using the **Back** button does not clear the cache, so the import file you originally selected appears in the field mapping step.

CAUTION: External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with

Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

8 For Step 4, follow the onscreen instructions, if necessary.

9 For Step 5, click Finish.

To view the queue for your import requests

1 In the upper right corner of any page, click the Admin global link.

2 In the Import and Export Queues section, click the Import Request Queue link.

The Import Request Queue page appears with information about your requests, including the estimated time of completion.

The following table describes the import status.

Status	Description
Queued	The import has not been processed yet.
In Progress	The import is being processed. NOTE: You can delete the request in this state. However, you must review any data that is partially imported into Oracle CRM On Demand.
Completed	No errors during import.
Completed with errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.
Cancelled	The import was cancelled.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every 20 seconds, or as set by a system process.
# Successfully Imported	The number of records that were imported without

Import Record Information	Description
	any problems.
# Partially Imported	The number that was imported but not all the fields for the record were imported.
# Not imported	The number of records that were not imported at all.
#Cancelled	The number of records imported before the import was cancelled.

To import multi-select picklist values

- 1 Separate the multivalue picklists by a semicolon in the CSV file.
For example, if you have a multivalue picklist containing first names and you want to import four names into this field, separate each name with a semicolon.
- 2 Click Add New Value To Picklist.
Oracle CRM On Demand imports your multivalue picklist.

Reviewing Import Results

You can track the progress of the import by reviewing the queue page in Oracle CRM On Demand. When the import request is completed, you can navigate to the import queue, and drill down on the completed import job. Each import request contains the submitted data file, generated map file, and a log file. This log file provides basic, log file information, including errors, the status of the import, and so on. If an error occurs during the import, it is recommended that you review the log file attached to the import request.

Additionally, when the import request is completed, you receive an email message outlining the specifics of the import. The email message summarizes the import and contains a log file, which lists the records and fields that were not imported.

You can then correct the data in your CSV file and import the information again. The second time, you should direct the system to overwrite existing records when it encounters duplicate records.

To view your import request queue

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Import and Export Tools section, click the Import and Export Tools link.
- 3 In the Import and Export Queues section, click the Import Request Queue link.

The Import Request Queue page appears, showing the time the import was completed or estimating the completion time.

To review the email message with import results

- Go to your email application and open the email message from Oracle CRM On Demand.

The message lists any errors that occur on a record-by-record basis along with action you should take, if you want to capture the complete data for that record.

Related Topics

See the following topic for related information:

- [Example of Import Results Email and Log File](#) (on page 1453)

Example of Import Results Email and Log File

When your import request is completed, you receive an email message summarizing the import results:

Dear Mike,

Your import request completed at 3/30/2007 7:10:06 AM. Here is a summary of the results:

User: qa/mjones

Import Type: Account

Import File Name: Accounts.csv

Time Completed: 3/30/2007 7:10:06 AM

Total Records: 496

Successfully Imported: 495

Partially Imported: 1

Duplicate Records Ignored: 0

Failed: 0

For more details on your import, please review the log file. If you require further assistance, refer to the online help.

Thank you for using Oracle CRM On Demand,

Oracle CRM On Demand Customer Care

Attached to the email is a log file listing each error that occurs during the import process, such as the following:

Record Specific Error EXTERNAL_SYSTEM_ID: 46552 No matching record is found for import field 'CURRENCY' with value 'INR'. The Oracle CRM On Demand field 'Account Currency' was not updated, but other field values were imported for this record.

Export Assistant

The following topics describe how to use the Export Assistant to export your Oracle CRM On Demand data:

- [Exporting Your Data](#) (on page 1454)
- [Reviewing Export Results](#) (on page 1456)

Exporting Your Data

You can fully or partially export your company's data from Oracle CRM On Demand to an external file. The file is a zip file that contains individual CSV files for each record type you select to export.

NOTE: If your company uses an industry-specific edition of the application, those record types specific to your industry (such as Households, Vehicles, MedEd Events, and Funds) along with their linked activities and notes are excluded from the export. Also, if you export records for *recurring* opportunity products, the application populates the Parent_ID column for that row. For non-recurring records, the Parent_ID cell is empty.

Before you begin. To perform this procedure, your role must include the Administration Export privilege.

To export your company's data

NOTE: There is a limit to the number of exports (both full and partial) that can be done on a weekly basis. A company can perform one full export every 7 days. A user can export up to 1000 records, regardless of the record type, every 7 days.

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section of the Admin Homepage, click the Import and Export Tools link .
- 3 On the Import and Export Tools page, click the Export Data link.
This starts the Data Export Assistant.
- 4 For Step 1:
 - a Do one of the following:
 - If you wish to perform a full export, select the Export All Record Types radio button.

- If you wish to perform a partial export, select the Export Selected Record Types radio button and the record types you wish to export.

b Click Next.

Each record type is exported to a separate CSV file within the zip file.

CAUTION: If you are exporting Notes data in Oracle CRM On Demand, the CSV file contains all the public Notes created in Oracle CRM On Demand as well as the private Notes belonging to the user exporting the data.

5 For Step 2:

- a** Select the time zone used in the exported CSV file.
- b** Select the date/time format used in the exported CSV file.
- c** Select the type of CSV delimiter used in your file: comma or semi-colon.
- d** Select the filter criteria to limit the data in your export.

NOTE: The first time you export your data, you might not want to filter on dates. After that, however, consider setting up incremental exports by filtering the data on dates since the previous export.

e Click Next.

6 For Step 3, follow the onscreen instructions to finish the export process.

To view the queue for your export requests

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Import and Export Queues section, click the Export Request Queue link.

The Export Request Queue page appears with information about your requests, including the estimated time of completion.

The following table describes the Export status.

Status	Description
Queued	The export has not been processed yet.
In Progress	The export is being processed. NOTE: The request cannot be deleted in this state.
Completed	No errors during export.
Completed with errors	The export completed but there were some errors with some of the records.

Status	Description
Failed	The export completed but none of the records were imported.
Error	The export did not complete because an error occurred.

The following table describes the export record information.

Import Record Information	Description
Submitted	Time and date when the export was performed.
Completed	Time and date when the export was finished.
# Exported	The number of records that were exported.
# Completed Objects	The number of objects that were successfully exported without any problems.

Reviewing Export Results

Your exported file appears in the completed request section within the application. You can also track the progress of the export by reviewing the same page.

To view your export results or queue

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section, click the Import and Export Tools link.
- 3 On the Import and Export Tools page, click the Export Request Queue link.
The Export Request Queue page appears, showing the time the export was completed or estimating the completion time.
- 4 In the Completed Requests section, click the Export Type or Record Type link to open the Export Request Details page.
- 5 Then you can:
 - Click Download to open or save the zip file. The zip file consists of an export summary text file and CSV files for each type of record you exported.
 - Click Delete to delete the file.

Oracle Data Loader On Demand Client Utility

The following topics describe how to use the Oracle Data Loader On Demand client to export your Oracle CRM On Demand data:

- [About the Oracle Data Loader On Demand Client Utility](#) (on page 1457)
- [Downloading the Oracle Data Loader On Demand Client Utility](#) (on page 1457)

About the Oracle Data Loader On Demand Client Utility

The Oracle Data Loader On Demand client is a command-line utility, which provides a means of importing data into Oracle CRM On Demand from external data sources. It has two functions:

- **Insert function.** This function takes records from a file and adds them to Oracle CRM On Demand.
- **Update function.** This function modifies existing records in Oracle CRM On Demand, using records from an external data source.

For more information, see Oracle Data Loader On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

Downloading the Oracle Data Loader On Demand Client Utility

Complete the following procedure to download this utility. To install and use this utility, see Oracle Data Loader On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

To download the Oracle Data Loader On Demand utility

- 1 Sign in to Oracle CRM On Demand, and click Admin.
- 2 Under Data Management Tools, click Import and Export Tools.
- 3 Under Oracle Data Loader On Demand, click Oracle Data Loader On Demand.
- 4 Save the ZIP file to your computer.

Web Services Integration

Oracle CRM On Demand allows you to:

- Access and change your Oracle CRM On Demand data from a Web services-enabled application
- Create your own applications that integrate with Oracle CRM On Demand

You can:

- Download Web Services Description Language (WSDL) files to help you develop applications that access Oracle CRM On Demand using the Web services interface, see [Downloading WSDL and Schema Files](#) (on page 1458).
- Download WSDL and Schema files for using the methods of the Integration Events Web service to access the integration queues, and track changes for particular record types. You can also download Schema files to track custom and renamed fields for the supported record types.
- View a summary of Web services used by your company, see [Reviewing Web Services Utilization](#) (on page 1460).

Downloading WSDL and Schema Files

The Web services provided by Oracle CRM On Demand allow users of client applications to interact with Oracle CRM On Demand, for example, to insert, update, delete, and query records and to perform a number of administrative tasks.

The Web services are available through:

- **Web Services v1.0.** Used to interact with Custom Objects 01-03, as well as preconfigured objects.
- **Web Services v2.0.** Used to interact with all Oracle CRM On Demand custom objects, as well as preconfigured objects. Compared to Web Services version 1.0, the Web Services version 2.0 API also offers additional options for issuing queries, using the QueryPage method.
- **Service APIs.** Used to manage administrative tasks through Web services. For example, service APIs allow the administration of users in Oracle CRM On Demand, and provide the ability to issue queries for system and usage information in relation to Oracle CRM On Demand.
- **Administrative Services.** Used to interact with Oracle CRM On Demand metadata through Web services. Administrative Services provides the capability of reading and loading Oracle CRM On Demand metadata in an XML format.

From the Web Services Administration page you can:

- Download the Web Services Description Language (WSDL) files used by applications that access the Web services
- Download schema files
- Access the Web services documentation

Downloading WSDL Files

You can download WSDL files for each record type, and for each of the service APIs.

To download a WSDL file

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Web Service Integration section, click Web Services Administration.
- 3 From the Select Service list, select Web Services v1.0, Web Services v2.0, Service APIs, or Administrative Services as required.

- 4 From the WSDL Object list, select the required record type, for example, Account, or the name of the service API.

The objects displayed in the WSDL Object list depend on the record types that are set up for your company.

- 5 Click one of the following buttons:

- Download Custom WSDL
- Download Generic WSDL

A page containing the WSDL is displayed.

Depending on whether you select Download Custom WSDL, or Download Generic WSDL, custom fields are displayed differently in the WSDL. For Custom WSDL, the XML tags for the custom fields are based on the Integration tags from Field Setup, see [Setting Up Custom Field Integration Tags](#) (on page 1047). Custom WSDL allows you to generate WSDL that is specific to your company and that uses your company's field-naming conventions.

For Generic WSDL, the custom fields are based on generic XML tags: CustomNumber0, CustomCurrency0, and so on. Using these placeholders, together with the Mapping Service allows applications to map to the field names that your company uses.

- 6 Save the WSDL file to your computer.

Downloading Schema Files

The Integration Events Web service uses Schema (XSD) files in its WSDL, which you download in addition to the integrationevents.wsdl file. The WSDL file contains placeholders for the XSD schema files of all record types for which your company currently has active integration event actions defined. Generic WSDL files are available. However, if you create custom fields or rename fields for a record type, then you cannot use the Download Generic Schema button. Instead, you must download an XSD file, using the Download Custom Schema button in the Web Services Administration page. For more information about the Integration Events Web service, see *Oracle Web Services On Demand Guide*.

To download a schema file

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Web Service Integration section, click Web Services Administration.
- 3 From the Select Service list, select Web Services v1.0 or Web Services v2.0.
- 4 From the WSDL Object list, select the required record type, for example, Account.

The objects displayed in the WSDL Object list depend on the record types that are set up for your company.

- 5 Click one of the following buttons:

- Download Custom Schema
- Download Generic Schema

A page containing the schema file is displayed.

Depending on whether you select Download Custom Schema, or Download Generic Schema, custom fields are displayed differently in the schema. For Custom Schema, the XML tags for the custom fields are based on the integration tags from Field Setup. For Generic Schema, the custom fields are based on generic XML tags.

- 6 Save the Schema file to your computer.

Accessing the Web Services Documentation

To access the Web services documentation, click Download Documentation in the title bar on the Web Services Administration page.

Reviewing Web Services Utilization

From the Web Services Utilization Page, you can review a summary of the Web services used by your company. By default, the Web service requests are listed by session ID. The Web Service client Name, Web Service name, operation, number of operations, start time, end time, and user alias for the session are displayed. The following table describes what you can do from the Web Services Utilization page.

To do this	Follow these steps
Create a new list of Web Service requests	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in Creating and Refining Lists (on page 73).
Display details of a Web service request	Click the session ID to display a detail page for the Web service request.
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists (on page 81).
Find a Web Service request	Select the required filter criteria in the drop-down lists next to Show results where.
Manage all the Web Service request lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page (on page 79).
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in Creating and Refining Lists (on page 73).
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page (on page 80).
Sort the Web service requests in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to see at one time.

To do this	Follow these steps
View a subset of Web services operations	<p>Click the drop-down list in the title bar and change the selection as required:</p> <ul style="list-style-type: none"> ■ All. Displays a list of all Web services operations ■ All Operations Today. Displays a list of all Web services operations for today

About Creating a Web Services List

The process for creating or refining a Web services list is similar to that described in [Creating and Refining Lists](#) (on page 73). However, the Web Service List pages do not have the Search In section that is provided on the corresponding pages for other record types.

The fields that you can use for filtering a Web services list, and which you can select for display in the search results are as follows:

Field	Description
End Time	The end time of the Web service request.
Entry Type	<p>Possible values are: Login, Logout, and Dispatch.</p> <p>Every Web service call, apart from login and logout, is set to Dispatch for this field because the calls go through the Inbound Web service Dispatcher business service.</p>
Input Message Size (Bytes)	The size of the input message in bytes.
Operation	The operation for the Web service request.
# of Operations	The number of operations in the Web service request.
Output Message Size (Bytes)	The size of the output message in bytes.
Session ID	<p>The session identifier of the Web service request.</p> <p>This is actually the foreign key for the corresponding session in the login history table, and not the actual session ID used in the Web service request.</p>
Start Time	The start time of the Web service request.
User Alias	The user alias of the user who executed the Web service request.
Web Service Client Name	<p>The name of the Web service client from which the request was made.</p> <p>Note: This is not supported for the Administrative Services APIs.</p>
Web Service Name	The name of the Web service to which the request was made.
Web Service Space	The namespace used in the request.

Oracle Migration Tool On Demand Client Utility

The following topics describe how to use the Oracle Migration Tool On Demand client to export your Oracle CRM On Demand data:

- [About the Oracle Migration Tool On Demand Client Utility](#) (on page 1462)
- [Downloading the Oracle Migration Tool On Demand Client Utility](#) (on page 1462)

About the Oracle Migration Tool On Demand Client Utility

The Oracle Migration Tool On Demand client is a command-line utility, which eliminates the need to copy customized configurations manually from Oracle CRM On Demand environment to another environment. For example, you might want to copy customized configurations from a customer test environment to a production environment. You can use this client utility with the Administration Services, which is a set of administration Web services, to automate the administration of your company's configurations. This client utility enables you to extract and import specific configuration information directly to and from your computer. You can import the configurations immediately or in batch mode. The Administration Services enable client applications to access the configurations. You can import the following configurations:

- Access profiles
- Field management definitions
- Custom record types
- Custom Web tabs
- Picklists
- Cascading picklists
- Custom Web links
- Action bars
- Homepage layouts
- Page layouts
- Roles

Downloading the Oracle Migration Tool On Demand Client Utility

Complete the following procedure to download the client utility, and follow the steps in Oracle Migration Tool On Demand Guide to install, configure, and use this client utility. Oracle Migration Tool On Demand Guide is available from the [Oracle CRM On Demand documentation library](http://www.oracle.com/technology/documentation/siebelcrmod.html) (see Oracle CRM On Demand documentation library - <http://www.oracle.com/technology/documentation/siebelcrmod.html>) on Oracle Technology Network. For information on downloading the Web Services Description Language (WSDL) that you require to access the Administrative Services, see [Downloading WSDL and Schema Files](#) (on page 1458). For information about the APIs provided by the Administrative Services, see Oracle Web Services On Demand Guide, which is available from the [Oracle CRM On Demand documentation library](http://www.oracle.com/technology/documentation/siebelcrmod.html) (see Oracle CRM On Demand documentation library - <http://www.oracle.com/technology/documentation/siebelcrmod.html>) on Oracle Technology Network.

To download the Oracle Migration Tool On Demand client utility

- 1 Create a directory on your computer in which to extract the Oracle Migration Tool On Demand files, for example, C:\Oracle Migration Tool On Demand.
- 2 Sign in to Oracle CRM On Demand, and click Admin.
- 3 Under Data Management Tools, click Import and Export Tools.
- 4 Under Metadata Import and Export Tools, click Oracle Migration Tool On Demand.
- 5 Save the ZIP file to your computer.

Batch Delete Queue Page

The Batch Delete Queue page displays all the active and completed delete record requests submitted by your company. From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps
Cancel an active request	When you delete the list of records from the record Lists page, you receive a confirmation email stating that the batch delete request has loaded successfully on the batch delete queue page. You can click the Cancel link to cancel the request until the Proceed link appears beside the request.
Proceed the active request	Click the Proceed link next to the request to finalize the batch delete request. You receive a confirmation email stating that the batch delete request has completed successfully and that the list of records is deleted.
Display the number of records	In the Number of Records Displayed drop-down list, select a number of requests to see at one time.
Delete the processed request	Click the Delete button to delete the batch delete request from the Processed Requests queue.
Log the processed request	Click the Log button to save the batch delete request as a log file.

Batch Assign Book Queue Page

The Batch Assign Book Queue page displays all the active and completed book assignment requests submitted by your company. From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps
Cancel	Click the Cancel link next to the request. You can cancel a request until its status changes to 'In Progress'.
Display details of a request	Drill down on the list name for the request. On the request Detail page, you can view the request properties and request parameters.
Show more or fewer requests	In the Number of Records Displayed drop-down list, select the number of requests to see at one time.
Delete the processed request	Click the Delete link to delete the request from the Processed Requests queue.
Log	Click the Log link to save the request as a log file.

When the request has completed, you receive an email notification.

For information on creating batch assignment requests, see [Assigning Records to Books](#) (on page 1200).

About Integration Events

An *integration event* is a mechanism for triggering external processes based on specific changes (create, update, delete, associate, dissociate) to the records in Oracle CRM On Demand. Integration events contain information about the data that was changed by the user. This information is stored in one or more integration event queues as an XML file, which allows the details of events in Oracle CRM On Demand to be accessed by external applications. For example, an external application might need to track Account changes in Oracle CRM On Demand and trigger local updates accordingly.

For customers who require multiple applications to integrate with Oracle CRM On Demand independently, the company administrator can define multiple integration event queues. Using the integration event functionality, the same event can be generated for multiple queues, and the external applications are guaranteed queue integrity, because the external applications can be configured to request only the events from a specific queue.

About Setting Up Integration Event Administration

If you are a new customer, the integration event functionality is automatically enabled. However, if you are an existing customer, the Oracle CRM On Demand integration event functionality must be configured by Customer Care and by your company administrator. Contact Customer Care to request support for Integration Event Administration and to specify the maximum total size of the integration event queues.

Note: The maximum size of the integration queues is not displayed on your Company Profile page.

When Customer Care has set up the integration event functionality, the Integration Event Administration link is visible in the Data Management Tools section of the Admin Homepage. Also, the Administrator user role has the Enable Integration Event Access privilege enabled. For more information about user roles, see [Adding Roles](#) (on page 1173).

About Creating, Storing, and Accessing Integration Events

To trigger the creation of integration events, you must create workflow rules with Create Integration Event actions. For each such action, you can specify which fields on a record are to be tracked. When the value changes in a tracked field, the change is recorded in an integration event. You can also specify to which queues the integration events are written. For more information about workflow rules, see [About Workflow Rules](#) (on page 1212).

Integration events are stored in one or more queues, the maximum total size of which is specified for your company by the Customer Care representative. A default integration event queue is provided, and you can create additional queues.

When a queue is full, any new integration events are not stored. When the number of integration events in the queue is again below the maximum, new events will once again be added to the queue.

On the Integration Event Settings page, you can delete integration events from a queue. You can also configure Oracle CRM On Demand to send a warning email to a specified address when the queue is full, or when the number of integration events in the queue exceeds a number that you specify.

You can disable integration event queues, including the default queue, but you cannot delete a queue.

External applications access the integration event queues by using the Integration Events Web service, which has two methods:

- **GetEvents.** Retrieves integration events from a queue.
- **DeleteEvents.** Deletes integration events from a queue.

For information about downloading the Web Services Description Language (WSDL) file for the Integration Events Web service, see [Web Services Integration](#) (on page 1457). For more information about the Integration Events Web service, see *Oracle Web Services On Demand Guide*.

- For a step-by-step procedure for creating an integration event queue, see [Creating Integration Event Queues](#) (on page 1465).
- For a step-by-step procedure to manage the integration event queues, see [Managing Integration Event Settings](#) (on page 1466).
- For a step-by-step procedure to create workflow rules that trigger integration events, see [Creating Workflow Rules](#) (on page 1221).

Creating Integration Event Queues

When Integration Event support is enabled, a default integration event queue is provided with Oracle CRM On Demand. However, you can also create additional queues and specify to which queues individual integration events are written.

Before you begin. Integration Event Administration must be set up for your company, as described in [About Integration Events](#) (on page 1464). When Integration Event Administration is set up, the maximum number of integration events allowed in the queues is configured as part of your company profile. To perform the following procedure, your user role must have the Enable Integration Event Access privilege.

To create an integration event queue

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section, click the Integration Event Administration link.
- 3 On the Integration Event Administration page, click the Integration Event Queue Management link.
- 4 On the Integration Queue Management page, click New Queue.
- 5 On the Integration Event Queue Settings Page, complete the following fields, and click Save.

Field	Comments
Queue Name	Enter the name for the queue. Required field.
Description	Enter a description of the usage of the queue.
Disabled	Ensure that this check box is not selected.
Queue Size	Enter the size of the queue. This size cannot exceed the size shown in the Unassigned Queue Capacity field. Required field. The Integration Event File Limit field shows the total number of events that the company can store for all queues. If the size of the existing queues matches this number, you cannot create a new queue.
Notification Email Address	Enter an email address if a warning email is to be sent when the queue is full or when the queue reaches a certain size.
Send Warning Email When The Number Of Queued Transactions Reaches	Specify the size that the queue is allowed to reach before a warning email is sent to the address specified in the Notification Email Address field.

Managing Integration Event Settings

You can edit the settings for all of the integration event queues.

Before you begin. Integration Event Administration must be set up for your company, as described in [About Integration Events](#) (on page 1464). When Integration Event Administration is set up, the maximum number of

integration events allowed in the queue is configured as part of your company profile. To perform the procedures described here, you must have the Enable Integration Event Access privilege in your user role.

To manage integration event settings

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Data Management Tools section, click the Integration Event Administration link.
- 3** On the Integration Event Administration page, click the Integration Event Queue Management link.
- 4** On the Integration Queue Management page, click the Edit link for the queue.
- 5** On the Integration Event Queue Settings page, you can perform the following tasks:

Task	Action
Disable a queue.	Select Disabled to disable all queues, including the default queue.
Update the size of a queue.	<p>Enter a value in the Queue Size field. This size cannot exceed the size shown in the Unassigned Queue Capacity field.</p> <p>The Integration Event File Limit field shows the total number of events that the company can store for all queues. If the size of the existing queues matches this number, you cannot increase the size of the queue.</p>
Delete transactions from a queue.	<p>To delete all transactions in the queue, select the When I Click Save, Clear All Transactions check box, and then click Save to delete the transactions.</p> <p>To Delete older transactions, click the calendar icon, and select a date in the When I Click Save, Clear Transactions Older Than field. Click Save to delete the transactions.</p>
Configure Oracle CRM On Demand to send a warning email when the queue is full or when the queue reaches a certain size.	Enter the email address, and (optionally) specify the size that the queue is allowed to reach before the warning email is sent. Click Save to save the email configuration.
Specify how the values of the Date and Time fields (for example, ModifiedDate, CreatedDate) are recorded in the integration events.	<p>Select a value from the Time Zone field:</p> <ul style="list-style-type: none"> ■ Select UTC to record the dates and times in Universal Time Code (UTC) format. ■ Select User Time Zone to record the dates and times according to the time zone of the user who updated the record. This is the default value.

Task	Action
Specify whether picklist values are recorded in integration events in the user's language or as language-independent code (LIC) values.	<p>Select a value from the Picklist Format field:</p> <ul style="list-style-type: none"> ■ Select Language Independent Values to record picklist values as LIC values. ■ Select User Language to record picklist values in the user's language. This is the default value. <p>Note: The LIC values of picklists are usually the same as the ENU values.</p>

Content Management

Companies often want to keep track of the products in which their customers express interest and which they subsequently purchase. To help your company's employees track product information, you can set up a product catalog. Setting up the product catalog consists of grouping products under categories (if required) and then setting up the products under each category. Products include recurring or one-time products, services, and training options.

The following sections describe ways in which tracking of products is useful in Oracle CRM On Demand:

Opportunities

A sales representative working on a sales opportunity can create an opportunity record to track the details of a customer's interests, including the potential revenue for the deal. A customer might be interested in several products and might consider purchasing a service contract as well. The sales representative can scroll down to the Products section of the opportunity record to link the product records for each of the items that the customer might buy. For the service contract, billed monthly, the sales representative can also record recurring revenue information. In this way, the opportunity record gives complete information about a potential deal, and allows your company to:

- Track the products belonging to each opportunity
- Calculate revenue streams generated over time based on those products (recurring and non-recurring products)

Assets

Both sales and service professionals find it helpful to know which of your company's products and services a customer has already purchased. In Oracle CRM On Demand, you can track purchased products or assets by linking product records to a customer's account or contact record.

Forecasts

A forecast is a periodic snapshot of sales performance compiled from individual opportunity or product records. An advantage of linking products to opportunity, account, or contact records is that a company can then determine whether to generate forecasts based on product and recurring revenue.

If your company bases its forecasting on product revenue rather than opportunity revenue, your employees can specify which products should be used for the forecast totals.

Click a topic to see step-by-step instructions for the procedures pertaining to Content Management:

- [Setting Up Product Categories](#) (on page 1469)
- [Setting Up Company Products](#) (on page 1470)
- [Setting Up Price Lists for PRM](#) (on page 1472)
- [Managing Your Company's Attachments](#) (on page 1475)
- [Setting Up Assessment Scripts](#) (on page 1476)
- [Setting Up Report Folders](#) (on page 688)

Setting Up Product Categories

If your company's product list is long, it is a good idea to organize products in logical groupings, each with a name that is meaningful at your company. These groupings are called product categories. Categories help you search for a product or set of products because they allow you to sort the list to quickly find what you need. The product categories also allow your employees to quickly identify the correct product to link to their opportunities. For example, an office equipment company might set up these categories: Copiers, Fax Machines, Service, and Supplies.

You can have as many categories and subcategories (children) as you want.

Before you begin:

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If your product categories have not been defined at your company, determine the categories and subcategories before setting up the information in Oracle CRM On Demand. When entering information, start from the top parent categories, and then add the children categories.

To set up your product categories

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Content Management section, click the Content Management link.
- 3 Click the Product Categories link.
- 4 On the Product Categories List page, do one of the following:
 - To add a category, click New.
 - To update category information, click Edit for the appropriate record.

NOTE: To limit the records displayed on this page (and make it easier to find the existing category), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.

- To add a child category to an existing category, click the link in the Category Name column, and then click New in the Child Categories section.
- 5 On the Category Edit page, enter the required information. The Category Name character limit is 100.
 - 6 Save the record.

Setting Up Company Products

Before you begin:

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If you are grouping products under categories, set up the categories before you define your products.

To allow employees to link products to opportunities, you need to set up your product inventory. When defining the products, mark the ones that you want to be on the list of products that your employees can order from (so that they can link products to their opportunities).

To add products

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Content Management section, click the Content Management link.
- 3 In the Product Catalog section, click the Products link.
- 4 On the Product List page, do one of the following:
 - To add a product, click New.
 - To update product information, click Edit for the required record.

NOTE: To limit the records displayed on this page (and make it easier to find the existing product), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.

- 5 On the Product Edit page, complete the information and save the record.

NOTE: To make the product available to employees (so they can link it to their opportunities), make sure the Orderable check box is selected.

TIP: You cannot delete products. Instead, you need to make the product inactive by clearing the Orderable check box. This removes the product from the list of products that your employees can select.

The following table describes field information for products. Company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table. (For additional information on product fields see [Product Fields](#) (on page 479).)

Field	Description
Key Product Information	

Field	Description
Product Category	Specific to Oracle CRM On Demand Financial Services Edition and Oracle CRM On Demand Life Sciences Edition.
Class	Grouping of products to which the product belongs. Specific to Oracle CRM On Demand Life Sciences Edition.
Price Type	Specific to Oracle CRM On Demand Life Sciences Edition.
Parent Product	Specific to Oracle CRM On Demand Life Sciences Edition.
Product Type	<p>Specific to Oracle CRM On Demand Automotive Edition and Oracle CRM On Demand Life Sciences Edition.</p> <p>If you are defining an Automotive product, the Product Type field must be set to Vehicle.</p> <p>If you are defining a Sample Drop product (where Type is set to Sample), the Product Type field must be set to Sample or remain empty.</p>
Therapeutic Class	Specific to Oracle CRM On Demand Life Sciences Edition.
Part #	The part number for the product.
Orderable	Select this field to make the product available to your employees. If you do not select Orderable, the product does not show up in the product list.
Type	<p>The type of product, which can be one of the following: Product, Service, Training, Market, Competitor, Detail, Sample, or Promotional Item. For Oracle CRM On Demand Life Sciences Edition, you must select the following values for Type:</p> <ul style="list-style-type: none"> ■ Detail, if the item is a Product Detail ■ Sample, if the item is a Sample Drop ■ Promotional Item, if the item is a Promotional Item Drop <p>Selecting these types, filters the type of products (product details, samples, or promotional items) that are visible in the sales representative's Sample Drop, Product Detail or Promotional Items pick lists.</p> <p>NOTE: If the Type is Sample, the Product Type field must also be set to Sample or remain empty.</p>
Sub Type	Specific to Oracle CRM On Demand Life Sciences Edition.
Status	The status of the product.
Revision	Specific to Oracle CRM On Demand Life Sciences Edition.
Serialized	Specific to Oracle CRM On Demand Life Sciences Edition.

Field	Description
Lot Number Tracking	Specific to Oracle CRM On Demand Life Sciences Edition.
Controlled	Indicator that the product is controlled. Specific to Oracle CRM On Demand Life Sciences Edition.
Additional Information	
Description	Additional information about the product. This field has a limit of 255 characters.

Setting Up Price Lists for PRM

Brand owners can maintain and publish price lists for their products, so that partners can use them when creating special pricing requests. Brand owner administrators can create multiple price lists and can associate each account or partner organization with one of them. Multiple products can be assigned to a price list and given a specific price.

On a special pricing request, the customer price list determines the Manufacturer's Suggested Retail Price (MSRP) of the products, and the owner partner price list determines the reseller purchase cost. Maintaining these prices in price lists streamlines administration and facilitates the special pricing process.

NOTE: Access to price lists is restricted to brand owner administrators who have the specific privilege of Manage PRM Access.

To create a price list

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Content Management section, click Content Management.
- 3 In the Product Catalog section, click Price Lists.
- 4 On the Price List page, do one of the following:
 - To add a price list, click New.
 - To update price list information, click Edit for the required record.

NOTE: To limit the records displayed on this page, click the menu in the title bar, and change the selection. The list contains the standard lists distributed with Oracle CRM On Demand along with the lists that you or your managers created.

- 5 On the Price List Edit page, complete the information.

The following table describes the field information for price lists. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
-------	-------------

Field	Description
Key Price List Information	
Price List Name	The name of the price list.
Effective From	The date that begins the effective period during which the indicated price list is valid.
Effective To	The date that ends the effective period during which the indicated price list is valid. If this field is empty, then the price list is effective indefinitely.
Type	<p>The type of price list. The valid values are: DIST COST and MSRP.</p> <p>DIST COST contains the distributors' costs, which are the original stocking costs that the partner or reseller must pay to purchase products from the brand owner.</p> <p>MSRP contains the Manufacturer's Suggested Retail Prices, which are the prices that the brand owner recommends for products sold to customers.</p> <p>New price list types can be added through customization. However, the values provided by default must not be changed. If they are changed, then the corresponding fields on the special pricing requests will not be populated using the price lists.</p>
Status	The current status of the price list (In Progress or Published). The default value for all new price lists is In Progress. When a price list can be made available to users, change its status to Published.
Currency	The type of currency used by the price list. All prices in a price list are in the same currency, which is defined when the price list is created. On saving the new price list record, this field becomes read-only and further updates to the record are not allowed.
Additional Information	
Created	The name of the person who created the price list, as well as the date and time when the price list was created.
Modified	The name of the person who last modified the price list, as well as the date and time when the price list was most recently modified.
Description	Additional information about the price list. This field has a limit of 2,000 characters.

Publishing Price Lists

After a price list has been updated by the administrator, it can be published to users and used when creating special pricing requests.

To publish a price list

- 1 Select a price list that you want to publish from the Price Lists section of the Content Management administration area.

For information on selecting special pricing requests, see [Finding Records](#) (on page 41).

- 2 On the Price List Detail page, click Edit.
- 3 On the Price List Edit page, choose Published from the Status menu.
- 4 Click Save.

When you change the status to Published, the following occurs:

- The price list becomes available for selection on the price list pick applet and can be associated with an account or partner organization.
- If the price list has been associated with a customer or partner on a special pricing request, then upon creation of each special pricing product, the price list is used to populate the Manufacturer's Suggested Retail Price (MSRP) and the partner Purchase Cost.
- On the special pricing request, the End Customer Price List is used for the former and the Owner Partner Price List for the latter. The following conditions should also be met:
 - The Price List associated with the End Customer is of type 'MSRP' and the Price List associated with the Owner Partner is of type 'DIST COST'.
 - The status of this Price List is 'Published'.
 - The Product that is added on the special pricing request exists on this Price List.
 - The Start Date of the special pricing request falls between the Effective From/To dates of the Price List (and the Price List Line Item).

Adding Price List Line Items

After creating a price list you add products to it. Each price list can contain multiple products, but a single product can be listed only once.

To add a product to a price list

- 1 On the Price List list page, click a price list name.
- 2 On the Price List detail page, click Add in the Price List Line Item section.
- 3 On the Price List Line Item Edit page, complete the information.

Note: You can also access the Price List Line Item Edit page from a Product Edit page.

The following table describes the field information for price list line items. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
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Field	Description
Key Price List Information	
Price List	The name of the price list.
Product	Select the product for the price list line item.
Effective From	The date that begins the effective period during which the indicated price list is valid. This date must be within the price lists Effective From and Effective To dates.
Effective To	The date that ends the effective period during which the indicated price list is valid. If this field is empty, then the price list is effective indefinitely.
Price Type	Denotes the type of the price (such as Standard, Recurring, and so on). This field is available for future use. The current default value is Standard.
List Price	The price for the line item during the indicated effective period.
Additional Information	
Created	The name of the person who created the price list, as well as the date and time when the price list was created.
Modified	The name of the person who last modified the price list, as well as the date and time when the price list was most recently modified.
Description	Additional information about the price list. This field has a limit of 2,000 characters.

Managing Your Company's Attachments

From the Content Management section of the Admin Homepage, you can access the Manage Attachments page, where you can review attachments.

NOTE: The Manage Attachments page shows only the attachments that are linked to parent records through the preconfigured Attachments related item. The Manage Attachments page does not show attachments that are linked to parent records through custom attachment record types, or attachments that are added to records through attachment fields. For a list of the record types that support the preconfigured Attachments related item, see [About Attachment Configurations](#) (on page 1102).

Reviewing attachments helps you to determine:

- Which file attachments are taking up large amounts of storage space
- Which files have been attached more than once

If a file has been attached more than once, consider placing the attachment on a common shared location and directing users to replace attachments with the path to those files.

- Which users need to be reminded of the storage issues for large attachments

Before you begin. To perform the procedures for managing attachments, your role must include the Manage Attachments privilege.

To review attachments

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Content Management section, click the Content Management link.
- 3** In the Manage Attachments section, click the Manage Attachments link.
- 4** Do any of the following:
 - To view the attachment, select View in the record-level menu for the attachment. This opens the file or takes you to the URL address.
 - To delete the attachment, select Delete in the record-level menu for the attachment. The deleted file or URL is moved to the Deleted Items page and is permanently removed from the database after 30 days.
 - To replace the file or URL with a different one, click Replace. On the Edit page, enter the required information and save the record.

For complete instructions, see [Attaching Files and URLs to Records](#) (on page 94).

- To limit the attachment records displayed in the list, click the drop-down menu and change the selection.

The drop-down list contains standard lists distributed with the application.

Setting Up Assessment Scripts

You can set up assessment scripts to help users to follow consistent processes when collecting data and making decisions. The assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, and so on. The assessment responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

With Oracle CRM On Demand, you can set up assessment scripts that allow your company to:

- Automate the qualification of leads.
- Assess opportunities (by enforcing a sales methodology at your company).
- Conduct customer satisfaction surveys for contact and service request records.
- Use call scripts for service request records.
- Capture activity information for a sales call, task, or appointment.

To find out more about assessment scripts, or to see step-by-step instructions for creating assessment scripts, see the following:

- [About Assessment Scripts](#) (on page 1477)
- [Creating Assessment Scripts](#) (on page 1480)

About Assessment Scripts

An *assessment script* is a series of questions that helps users to collect customer data. Assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, capture activity information, and so on.

You can score customer answers, assign different weights to questions, and set thresholds for establishing decisions. In addition, you can map fields used during the assessment to the parent record and, later, run reports and analyses, based on those fields.

How Are Assessment Scripts Used?

The process of using an assessment script is as follows:

- 1 The user launches an assessment script from a record detail page. The appropriate assessment scripts (determined by specified record field values) are listed on the record detail page. The user can also search for other assessment scripts, if necessary.
- 2 Working through the assessment questions, the user gathers critical customer information, such as details about the quality of a sales lead, and selects the correct response for each question from a drop-down list of choices.
- 3 Based on the responses, a score is automatically calculated, and the record is updated. For example, a lead is classified as qualified or rejected.
- 4 The answers to the questions are mapped as field values in the record, so that the answers are easily accessible, and available for reporting.
- 5 The completed assessments are stored and can be accessed in a related records section of the parent record.

Which Type of Assessment Script Should You Create?

You can set up five different types of assessment scripts. Each script type is suitable for a specific task. Use the script types as follows:

- **Contact Script:** Use this type to conduct customer satisfaction surveys with individual contacts.
- **Lead Qualification:** Use this type to help sales representatives to identify the qualified leads. Using a script for this task reduces the need for training and enforces consistent lead qualification.
- **Opportunity Assessment:** Use this type to embed sales methodologies, and help sales representatives to assess the opportunities, so that they can adjust their sales strategies as they work on deals.
- **Service Request-Script:** Use this type to help service representatives to assess service requests; for example, to determine the priority or the escalation path for the request. Using a script for this task reduces the need for training and enforces consistent customer service.
- **Service Request-Survey:** Use this type to administer customer satisfaction surveys (that are linked to a specific service event.)
- **Activity Assessment:** Use this type to capture valuable contact and account call information.

Each type of assessment is linked to a corresponding record type: Contact, Lead, Opportunity, Service Request, Sales Call, Appointment, or Task. If necessary, you can create multiple assessments of each type and present the appropriate script to the user. The script is based on the specified record criteria.

Process of Creating Assessment Scripts

You must complete several tasks to set up an assessment script.

1 Customize the assessment script filters.

The filters allow you to define the criteria used to identify the appropriate assessment for a task, based on the specified record field values.

For example, a lead qualification assessment script might be set up with these filters:

- Account Tier = Gold
- Segment = Large
- Region = West

Then, when a user launches an assessment script from a lead record with the corresponding values, the correct lead qualification script is listed.

All assessment script types use the same four filter fields, each with a defined picklist of values. To customize the filters, you must:

- a Enter the filter field display names and picklist values for every record type for which you want to create an assessment script.

For more information, see [Creating Assessment Scripts](#) (on page 1480).

- b Add the filter fields to the page layouts for every record type for which you want to create an assessment script.

2 Create the assessment script:

- a Enter the script details.
- b Add criteria (questions) to the script.
- c Add a list of potential answers for each question.

For more information on these steps, see [Creating Assessment Scripts](#) (on page 1480).

3 Give users access to the script:

- a For each user role that must use assessment scripts, configure the user role and the access profiles:
 - **To create assessments.** For a user to be able to create assessment scripts, you must give the user's role access to the Assessment record type, which means that the access-level setting for the default and owner access profiles for the user's role must be set to at least Read/Edit for the Assessment record type. Also, the record type access-settings for the role must have the Has Access and Can Create check boxes selected for the Assessment record type.
 - **To view assessments.** For a user to be able to view the details of an assessment, you must give the user's role read access to the Assessment record type, which means that the access-level

setting for the default and owner access profiles for the user's role must be set to at least Read-Only for the Assessment record type. Also, the record type access-settings for the role must have the Has Access and Can Read All Records check boxes selected for the Assessment record type.

For more information about setting up user roles, see [Adding Roles](#) (on page 1173). For more information about setting up access profiles, see [Process of Setting Up Access Profiles](#) (on page 1164).

- b** For each record type for which you have created assessment scripts (contacts, leads, opportunities, or service requests), add the appropriate assessment script section to the displayed information on the record detail page. For more information about customizing page layouts, see [Customizing Static Page Layouts](#) (on page 1057).

Example of an Assessment Script

A typical script that a company administrator might want to set up is a Lead Qualification script, which is used to determine whether a lead is to be qualified or rejected.

The following table shows the example values that might be used for such a script.

Script Field	Example Value
Type	Lead Qualification
Threshold Score	50
Outcome Value If Threshold Met	Qualified
Outcome Value If Threshold Not Met	Disqualified
Field to Map Outcome Value To	Description

CAUTION: If a Lead Qualification script attempts to set the Status field on a lead to Qualified, it will not be able to do so unless the Rating and Sales Person fields on the lead are filled in. If these fields are not filled in, an error message is displayed, and the script assumes the lead has failed to meet the threshold. The script then sets the Status field according to the results defined on the script for failing to meet the threshold.

Some examples of criteria for the Lead Qualification script are shown in the following table.

Criteria	Weight
What is the current state of your budget?	50
What is driving the timeline for this project?	25
When is it planned to make a decision?	25

Examples of answers and scores for the question "What is the current state of your budget?" are shown in the following table.

Answer	Score
Budget Approved	100
Budget Rejected	0

The score for each criterion is calculated by multiplying the weight of the criterion by the score for the answer, where the weight is a percentage. In this example, if a user chooses the answer Budget Approved, the score for the question is calculated as follows:

$$(0.5 * 100) = 50$$

The total score for the script is the sum of the scores for all the criteria. If the final outcome of the script meets or exceeds the threshold defined in the script, the value of the Description field on the Lead Detail page is set to Qualified. If the score falls below the threshold, the value of the field is set to Disqualified.

When assessment scores are calculated, the following rules apply:

- Scores for individual questions are rounded to the nearest single decimal place.
- The overall assessment score is rounded to the nearest whole number.
- Rounding rules are based on standard mathematical rules, so that a decimal value of less than 0.5 is rounded down, while a decimal value of 0.5 or greater is rounded up.

Creating Assessment Scripts

To customize assessment script filters and create an assessment script, follow the steps in this topic.

Before you begin:

- To perform this procedure, your user role must include the Administer Assessments privilege.
- If necessary, customize the picklist values and fields you want to use as part of the assessment criteria. For example, you can add custom fields to display information collected during the customer interview. When you set up the script, you can map the answers to those custom fields.

Be sure to add any new fields to the page layout for that record. For instructions, see [Customizing Static Page Layouts](#) (on page 1057).

NOTE: You cannot translate the components of assessment scripts directly in Oracle CRM On Demand. If you want to use an assessment script in more than one language, you must create a version of the script in each language.

You can use assessment script filters to identify which script is the appropriate one to present to a user for a task, based on specified record criteria. The following procedure describes how to customize assessment script filters.

To customize assessment script filters (optional)

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 Under Record Type Setup, click Assessment.
- 4 Click Assessment Field Setup.
- 5 Click Edit and edit the Display Name column for each of Filter 1, 2, 3, and 4.
- 6 For each field, click Edit Picklist and set up the values for the picklist.

TIP: Keep the default <No Values> value at the top of the picklist options, unless you want to force your employees to select something from the picklist.

- 7 Save the record.
- 8 To relabel these fields in the record pages that your employees use, go to the Field Setup section and select the record types you are running assessment scripts with: Contact Fields, Lead Fields, or Service Request Fields.

NOTE: The same picklist values you set up for Assessment Fields are displayed in these other records. However, you can customize the display name for these fields for each record type.

To create an assessment script

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Content Management link.
- 3 Click the Assessment Scripts link.
- 4 On the Assessment List page, click New Assessment.
- 5 On the Assessment Edit page, complete the information.

The following table describes field information for assessments. An administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Name	Limit of 50 characters. Use a descriptive name that includes the purpose of the script. If your company employees use various languages, include the language in the script name.
Type	Determines the record type the script is linked to. Default values are Contact Script, Lead Qualification, Opportunity Assessment, Service Request - Script, Service Request - Survey, and Activity Assessment.
Active	Only scripts that are active are available to users.
Filter 1, 2, 3, 4	Displays the label that you set up for the assessment category.
Threshold Score (1-100)	Used to calculate the outcome of the scripts. If the score of the script is equal to or higher than the threshold, the outcome is met.
Field to Map Score To	Determines the field to display the score in the parent record.
Outcome Value If Threshold Met	(Optional) Determines the value to display if the outcome is met. For example, if the lead meets the criteria for qualification, this field can display <i>Qualified</i> .
Outcome Value If Threshold	(Optional) Determines the value to display if the threshold is not

Field	Description
Not Met	met. For example, if the lead does not meet the criteria for qualification, this field can display <i>Rejected</i> .
Field to Map Outcome Value To	(Optional) Determines the field to display the outcome in the parent record when the script is completed.
Remove Comment Box	Select this check box to remove the ability to add comments when completing an assessment. If this check box is not selected, then a comment box is visible, and you will be able to enter a comment when completing an assessment.
Response Control	Determines the control that will be used for adding responses to assessment criteria. The options are: Drop Down or Radio Button.

NOTE: An assessment script must be active and have at least one criterion defined before it is displayed on the Record Detail page.

- 6 Click Save.
- 7 On the Assessment Detail Page, in the Criteria section, click New or Edit.
- 8 On the Criteria page, complete the information.

The following table describes the fields you complete for the criteria.

Field	Description
Order	Determines the sequence of the questions presented to the user when the user is completing the assessment.
Criteria Name	A short, descriptive name that summarizes the question. The field has a limit is 20 characters.
Question	A question that the user answers. The field has a limit of 50 characters.
Weight	A percentage between 0 and 100 to indicate the importance of the question. The sum of the weights for all questions must equal 100.
Answer Map to Field	Specify a field on the parent record for mapping the answer to the question in the Question field. Mapping answers to the parent record makes the values available in integration, reporting, and lists.

- 9 On the Assessment Detail Page, click each criterion name and then click the New or Edit button in the Answers section.
- 10 On each Answers page, complete the information:

Field	Description
Order	Determines the sequence of the answers presented to the user when the user is completing the assessment.

Field	Description
Answer	Enter a valid answer for the user to select for the question. Limit is 30 characters.
Score	The number of points associated with the answer. The score for the selected answer is multiplied by the weight of the associated question to determine the total question/answer score.

11 Save your changes.

NOTE: For each user role that must use assessment scripts, you must configure the user role to provide access to assessment scripts. For information on the settings that are required for the user role, see [About Assessment Scripts](#) (on page 1477).

TIP: Be sure each role has a page layout that includes the new fields you added for assessment.

Life Sciences Management

This topic provides information about deleting and managing smart call templates.

For more information, see [Managing Smart Calls](#) (on page 1483).

Managing Smart Calls

You can manage smart calls if your user role has the appropriate access level for the Smart Call record type (either Default or Owner access). You can review, edit, and update the details and line items attached to a smart call from the Manage Smart Call Templates page. After editing, the revised smart call template can be applied as required, and saved as either a public or private template.

NOTE: You cannot duplicate smart call templates. Each smart call template must be unique.

To manage smart calls

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Smart Call Management link.
- 3 On the Manage Smart Call Templates page:
 - To review the smart call, click the link in the Subject column.
 - To delete the smart call, click Delete in the appropriate row.
 - To edit the details of a smart call, click Edit in the appropriate row.

For information about the fields on the Call Edit page, see [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126).

- To edit a smart call line item, click the link in the Subject column, go to the appropriate section on the Smart Call Detail page, then click Edit next to the appropriate line item.
- To delete a smart call line item, click the link in the Subject column, go to the appropriate section on the Smart Call Detail page, then click Delete next to the appropriate line item.
- To add a new line item to the smart call, click the link in the Subject column.

For more information about adding line items to a smart call, see the tasks that follow.

- Revised smart call templates can be applied in the normal way and saved as either public or private templates, as described in the following tasks in [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126):
 - To track a visit (sales call) to a customer
 - To save the call information as a template

4 On the Manage Smart Call Templates page, click the Menu button.

The following table describes the tasks that you can perform from the Menu button on the Manage Smart Calls Templates Page.

To do this	Follow these steps
Batch Assign Book	On the Manage Smart Call Templates title bar, click Menu, and select Batch Assign Book. Complete the steps described in Assigning Records to Books (on page 1200).
Refine List	On the Manage Smart Call Templates title bar, click Menu, and select Refine List. Complete the steps described in Creating and Refining Lists (on page 73).
Save List	On the Manage Smart Call Templates title bar, click Menu, and select Save List.
Show List Filter	On the Manage Smart Call Templates title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page (on page 80).
Manage Lists	On the Manage Smart Call Templates title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page (on page 79).
Create New Lists	On the Manage Smart Call Templates title bar, click Menu, and select Create New Lists. Complete the steps described in Creating and Refining Lists (on page 73).

The following procedure describes how to link product detailed information to a smart call record.

To link product detailed information to a smart call record

- 1 On the Smart Call Detail page, scroll down to the Products Detailed section, and click New.

NOTE: If the Products Detailed section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Products Detailed section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- 2 On the Product Detailed Edit page, enter the required information.

For more information about the fields on the Product Detailed Edit page, see the following task in [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126): To link product detailed information to a call record.

- 3 Save the record.

Repeat these steps, as required, to add more Product Detailed line items to the smart call record.

The following procedure describes how to link samples dropped information to a smart call record.

To link samples dropped information to a smart call record

- 1 On the Smart Call Detail page, scroll down to the Samples Dropped section and click New.

NOTE: If the Samples Dropped section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Samples Dropped section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- 2 On the Samples Dropped Edit page, enter the required information.

For more information about the fields on the Samples Dropped Edit page, see the following task in [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126): To link samples dropped information to a call record.

- 3 Save the record.

Repeat these steps, as required, to add more Samples Dropped line items to the smart call record. For additional information on samples dropped, see [Dropping Samples During a Sales Call](#) (on page 469).

The following procedure describes how to link promotional items, educational items, or other marketing items to a smart call record.

To link promotional items, educational items, or other marketing items to a smart call record

- 1 On the Smart Call Detail page, scroll down to the Promotional Items section, and click New.

NOTE: If the Promotional Items section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Promotional Items section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- 2 On the Promotional Item Dropped Edit page, enter the required information.

For more information about the fields on the Promotional Item Dropped Edit page, see the following task in [Tracking Visits \(Sales Calls\) to Customers](#) (on page 126): To link promotional items, educational items, or other marketing items to a call record.

- 3 Save the record.

Repeat these steps, as required, to add more Promotional Items line items to the smart call record.

The following procedure describes how to link book information to a smart call record.

To link book information to a smart call record

- 1 On the Smart Call Detail page, scroll down to the Books section, and click New.

NOTE: If the Books section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Books section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- 2 On the Books page, enter the required information.

For more information about the fields on the Books Edit page, see [Book Fields](#) (on page 1202).

- 3 Save the record.

Repeat these steps, as required, to add more Book line items to the smart call record.

Expression Builder

Click a topic to see information about Oracle On Demand Expression Builder (Expression Builder) and how to use it:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [About Expressions](#) (on page 1489)
- [Data Types in Expression Builder](#) (on page 1493)
- [Expression Builder Operators](#) (on page 1495)
- [Expression Builder Functions](#) (on page 1499)
- [Expression Builder Examples](#) (on page 1546)

About Expression Builder

Oracle On Demand Expression Builder (Expression Builder) is a tool for implementing business rules using expressions. An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Oracle CRM On Demand.

Expression Builder is used in the following areas in Oracle CRM On Demand:

- Advanced field management, in the following contexts:
 - Configuring field validation properties on a field
 - Specifying default field values

When defining field level validations and default field values, a company administrator can create flexible expressions to cover a variety of business rules. For more information on field validation and default values, see [About Field Management](#) (on page 1033).

- Workflow rules, in the following contexts:
 - Configuring workflow rule conditions

- [Configuring Send Email actions](#)
- [Configuring Update Values actions](#)

From the Workflow pages, a company administrator can set up workflow rules that are evaluated when a record is updated, created, or deleted. Expressions are used to define both the conditions on the rules, and the actions that are executed by the rules. For more information about workflow rules, see [About Workflow Rules](#) (on page 1212).

NOTE: Expression Builder can verify the syntax of an expression, but it cannot evaluate or verify an expression for mathematical, logical, or semantic accuracy.

Related Topics

See the following topics for related Expression Builder information:

- [Using Expression Builder](#) (on page 1487)
- [About Expressions](#) (on page 1489)
- [Data Types in Expression Builder](#) (on page 1493)
- [Expression Builder Operators](#) (on page 1495)
- [Expression Builder Functions](#) (on page 1499)
- [Expression Builder Examples](#) (on page 1546)

Using Expression Builder

In Oracle CRM On Demand, you can use Expression Builder wherever you see the *fx* icon beside a text box. Clicking the icon opens Expression Builder in a separate window.

To build an expression

- 1 Click the *fx* icon to open Expression Builder.
- 2 In Expression Builder, select the fields and functions from the lists, or type in the expression editor.
When you select a field from the list, the field is pasted in to the expression editor. For example, when you select CloseDate from the list of Opportunity fields, [*<CloseDate>*] is pasted into the expression editor.

NOTE: If your company administrator has renamed a field, the Fields picklist shows the new field name. However, the original field name (that is, the corresponding XML name) is pasted into the expression editor.

The brackets around the field name indicate that the value of the particular field will be evaluated and returned in its specific data type. See the following table for more information about selecting fields and field values.

- 3 Edit the expression by adding operators and literals as needed.

NOTE: If you want your expression to determine whether a picklist field has a certain value, do not type the value in the expression. For example, do not type [`<AccountType>`] = "Customer". Instead, select the picklist field from the list, and click the Show Acceptable Values link in Expression Builder. Select the value that you want to use in the expression from the values shown. The expression looks something like the following:

```
[<AccountType>]=LookupValue("ACCOUNT_TYPE", "Customer")
```

4 (Optional) Click Check Syntax, and then make any corrections.

5 Save your expression.

The following table describes Expression Builder.

Interface Element	Description
<i>record type</i> Fields	<p>Provides a context-specific picklist of the fields (from the context record type) that are allowed in an expression. If your company administrator has renamed some fields, the Fields picklist shows the new field names.</p> <p>Note the following points:</p> <ul style="list-style-type: none"> ■ If you are creating a workflow rule, or actions related to a workflow rule, the context record type is the record type specified in the definition of the workflow rule. For example, if you are creating the body of an email that is to be sent as an action on a workflow rule for a service request record, the context record type for Expression Builder is Service Request. ■ In advanced field management, the context record type is the record type that is the parent of the field where the expression is being created. For example, when defining field validation on an opportunity field, the context record type for Expression Builder is Opportunity.
Show Acceptable Values	<p>When you have selected a field from the Fields picklist, click Show Acceptable Values to display the acceptable values for that field.</p> <ul style="list-style-type: none"> ■ If the selected field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. <p>You can select only one option at a time. Selecting an option results in the definition of a Lookup function that can be used in an expression.</p> <ul style="list-style-type: none"> ■ If the selected field is not a picklist field, Show Acceptable Values displays a window that describes the acceptable values for a variety of data that the field can hold.
Functions	<p>Provides a drop-down list of the special functions that are available to modify, extract, or process data within an expression. For a list of the available functions, see Expression Builder Functions (on page 1499).</p>
Expression	<p>A multiline editable text box that displays the expression.</p> <p>For information about the maximum supported length of an</p>

Interface Element	Description
	<p>expression, see About Expressions (on page 1489).</p> <p>Fields and functions that you select from the picklists appear in the expression editor. You can also type expressions directly in the expression editor.</p> <p>The expression syntax always displays the language-independent field names. (A language-independent name is a name that does not change when the user language changes.) For custom fields, field names appear in the expression with integration tags affixed to the language-independent names.</p>
Syntax Guide	Displays the Expression Builder topic in Oracle CRM On Demand online help.
Sample Expressions	Displays the following topic, Expression Builder Examples, in Oracle CRM On Demand online help.
Check Syntax	Validates the syntax of the expression that you created.
Save	Saves the expression.
Cancel	Closes the Expression Builder window without saving any changes.

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [About Expressions](#) (on page 1489)
- [Data Types in Expression Builder](#) (on page 1493)
- [Expression Builder Operators](#) (on page 1495)
- [Expression Builder Functions](#) (on page 1499)
- [Expression Builder Examples](#) (on page 1546)

About Expressions

An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Oracle CRM On Demand. This topic provides information about the following features of expressions:

- Expression length
- Literal length
- Conditional expressions

- Validation expressions
- Using dependent fields in expressions

Expression Length

For the message body of an email configured through the Send Email action on a workflow rule, the maximum supported length of an expression is 2000 characters, including spaces. You can insert a line break in the email message by pressing Enter. A line break is counted as two characters in the text box.

In all other cases where Expression Builder is used, the maximum supported length of an expression is 1024 characters, including spaces.

You must also ensure that the total number of characters in the field where you are saving the expression does not exceed the limit for that field. In the following workflow fields, three percent signs (%%%) are placed before and after functions and field names:

- The Subject and Message Body fields in an email configured through the Send Email action
- The Subject and Description fields in a task configured through the Create Task action

The percent signs indicate that the function or field name is to be converted to a text value. Each percent sign is counted as one character in the field where the expression is saved.

If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added.

For example, if you use Expression Builder to insert the following field name into the message body of an email on a workflow action:

```
[<AccountName>]
```

Expression Builder inserts the following (a total of 21 characters) into the message body of the email on the workflow action:

```
%%%[<AccountName>]%%%
```

Literal Length

When you pass a string or numeric literal to a function in Expression Builder, the literal must not contain more than 75 characters, including spaces. If a literal exceeds 75 characters, then Expression Builder considers the literal to be a syntax error. When you pass a string to a function by referencing a field name, the limit of 75 characters does not apply to the length of the value in the field passed to the literal.

When you create an expression to set a default value for a field, the limit of 75 characters applies to any string or numeric literals passed to any function in the expression. In addition, the number of characters in the result of the expression must not exceed the maximum number of characters allowed in the field.

Conditional Expressions

A conditional expression is an expression that, when evaluated by the application, always returns a Boolean value such as True or False.

NOTE: Yes, No, Y, and N are not Boolean values. If you specify True or False as return values for functions such as the **IIf** (on page 1508) function, then True and False are returned as strings and not as Boolean values. Using incorrect Boolean values in conditional expressions can result in unpredictable behavior.

An expression used in any of the following contexts must be a conditional expression:

- To specify a field validation rule
- To specify a condition in a workflow rule
- As the first parameter in an [IIf](#) (on page 1508) function

Validation Expressions

Validation expressions are used to ensure that the data entered in fields is valid. A validation expression must be a conditional expression.

A validation expression for a field is evaluated when the record is created, and each time the field is updated by a user, except in the following circumstances:

- A field is left blank when the record is created. Field validation does not force a value to be required.
- A field has a pre-existing invalid value, and it is not changed when it is updated.

If a validation expression is not evaluated, or if a validation expression evaluates to NULL, no error message is generated. An error message is generated only when the validation expression fails (that is, the expression evaluates to FALSE).

A validation expression is different from other types of expressions in that it can start with a conditional operator. For example, if Account Name is the field being validated by the expression, the expression can start with:

```
= 'Acme Hospital'
```

This expression, though not well formed, will pass a syntax check, because Oracle CRM On Demand inserts the name of the field being validated before the expression if it does not find a field name at the start of the expression. You can also enter the validation expression as follows:

```
[<AccountName>]= 'Acme Hospital'
```

where [<AccountName>] is the field being validated.

If the expression requires other fields to be evaluated in addition to the field being validated, it is standard practice for the first comparison in the expression to be performed on the field being validated.

Validation expressions are used only in the Field Validation text box in advanced field management in Oracle CRM On Demand.

Validation Expression Examples

Example 1: A business process requires that the close date of an opportunity must be later than the created date of the opportunity.

To implement this process, create a validation expression for the Close Date field (in the Field Setup page for opportunities) as follows:

```
> [<CreatedDate>]
```

Alternatively, you can use the following example, but note that the field that is being evaluated (Close Date) must be the first field in the expression:

```
[<CloseDate>] > [<CreatedDate>]
```

For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 1043).

Example 2: A business process requires that the revenue of an opportunity must be a nonzero value when the probability of the opportunity is 40% or greater.

The business rule indicates that the dependency is on both fields and can be restated as follows:

For an opportunity, revenue cannot be zero when the probability is greater than or equal to 40. Conversely, the probability cannot be greater than or equal to 40 if the revenue is zero.

A validation expression for a field is evaluated when the record is created, and each time the field is updated by a user. Because an update to either the Probability field or the Revenue field can affect both fields, you must have validation rules on both the Probability field and the Revenue field to implement the business rule correctly. (For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 1043).)

The steps required to implement this example are as follows:

- 1 Configure the following validation rule for the Probability field:

`< 40 OR ([<Probability>]>= 40 AND [<Revenue>]> 0)`

Note that you do not use the percentage sign (%).

- 2 Add a validation error message such as the following to the Probability field:

Revenue must be greater than 0 when the probability is greater than or equal to 40%.

- 3 Configure the following validation rule for the Revenue field:

`(> 0 AND [<Probability>]>= 40) OR [<Probability>]< 40`

- 4 Add a validation error message such as the following to the Revenue field:

Revenue must be greater than 0 when the probability is greater than or equal to 40%.

Using Dependent Fields in Expressions

A *dependent field* is a joined field whose values depend on a foreign key. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. An example of a dependent field is the AccountName field on the Opportunity record type. The AccountName field on the Opportunity record type is a joined field whose values depend on the AccountId foreign key field, which references the Account record type.

If your expression needs to determine the value of a dependent field, it is recommended that you use the JoinFieldValue function and get the most recent value of the field by referring to the ID field, that is, the foreign key field. Otherwise, the results of your expression might be incorrect, and the outcome of the expression value might be invalid.

For more information about joined fields and the JoinFieldValue function, see [JoinFieldValue](#) (on page 1511).

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)

■ [Expression Builder Functions](#) (on page 1499)

Data Types in Expression Builder

This topic describes the data types in Oracle CRM On Demand, and how they are used in Expression Builder.

Data Types in Oracle CRM On Demand

The following table shows the data type returned when an Oracle CRM On Demand field is used in an expression. To get the value of a field, use the syntax [`<FieldName>`].

Oracle CRM On Demand Field Type	Return Type in Expressions
Integer	Integer
Picklist	String
Currency	Currency
ID	String
Text	String
Check box	Boolean. For example, you can use [<code><Active></code>] directly in places where conditions are expected. You can also use <code>FieldValue('<Active>') = 'Y'</code> .
Date	Date
Date Time	Date Time
Number	Number

NOTE: If the company administrator has renamed fields, the *record type* Fields list shows the new names, but the expression syntax shows the original names. For custom fields, the Integration Tag names that the company administrators can change are used in the expression syntax. The syntax is as follows:

[`<CustomTag_ITAG>`] and `FieldValue('<CustomTag_ITAG>')`

Data Type Arithmetic

When a statement references more than one field value, and the fields have different data types, the order of the data types can affect the calculation. When an operator (other than the exponent operator) is applied to two operands of two different data types, the operand on the right side of the operator is converted to the data type of the operand on the left side before the operation is evaluated. For example, if `CloseDate` is 02/09/2007, the following expression:

```
PRE('<CloseDate>') + 30
```

evaluates to 02/09/200730. Therefore, the following condition:

```
[<CloseDate>] > PRE('<CloseDate>') + 30
```

is syntactically valid, but its meaning is invalid. The condition is correctly written as follows:

```
[<CloseDate>] - 30 > PRE('<CloseDate>').
```

NOTE: When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

The following tables show the possible results of the various arithmetic operations, using the example values.

Field	Data Type	Example Value
Quantity	Integer	5
Item Price	Currency	2.25

Calculation	Result	
	Value	Data Type
[<Item Price>] + [<Quantity>]	7.25	Currency
[<Quantity>] + [<Item Price>]	7	Integer
[<Item Price>] - [<Quantity>]	(2.75) NOTE: For currency fields, parentheses indicate that the value is negative.	Currency
[<Quantity>] - [<Item Price>]	3	Integer
[<Item Price>] * [<Quantity>]	11.25	Currency
[<Quantity>] * [<Item Price>]	10	Integer
[<Item Price>] / [<Quantity>]	0.45	Currency
[<Quantity>] / [<Item Price>]	2.50	Currency

When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

In this example (where Quantity is an integer field, value 5, and Item Price is a currency field, value 2.25), if the operand on the right side of the operator was converted to the data type of the operand on the left side, the expected value of Quantity ^ Item Price would be 25, and the expected data type would be integer. However, the results are shown in the following table.

Calculation	Result	
	Value	Data Type
[<Item Price>] ^ [<Quantity>]	57.67	Currency
[<Quantity>] ^ [<Item Price>]	37.38	Currency

The negation operator (minus sign [-]) is also supported in Expression Builder. For example:

Calculation	Result	
	Value	Data Type
-1 * [<ItemPrice>]	(2.25)	Currency

If you convert a number to a string, the calculation does not work correctly. For example:

Calculation	Result		Description
	Value	Data Type	
1234 + abcd	1234	Number	The string "abcd" evaluates to the number 0 and is then added to 1234.
abcd + 1234	abcd1234	String	The number 1234 evaluates to the string "1234" and is appended to the string "abcd".

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Expression Builder Operators

This topic describes the operators that you can use in Expression Builder, and the order in which they are evaluated.

Arithmetic Operators

The following table describes the purpose of each arithmetic operator and gives an example of how it is used.

Operator	Purpose	Example
+	Add	[<Record Number>] + 1
-	Subtract	[<Record Number>] - 1
-	Negate	[<Revenue>] < -100
*	Multiply	[<Subtotal>] * 0.0625
/	Divide	[<Total Items>] / [<Total Orders>]
^	Exponent	[<Grid Height>] ^ 2

Logical Operators

The following truth table shows the possible results from the logical operators in Expression Builder.

Logical Operator	First Operand	Second Operand	Result
NOT	TRUE		FALSE
	FALSE		TRUE
	NULL		NULL
AND	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	FALSE
	FALSE	TRUE	FALSE
	TRUE	NULL	NULL
	FALSE	NULL	FALSE
	NULL	TRUE	NULL
	NULL	FALSE	FALSE
	NULL	NULL	NULL
OR	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	TRUE

Logical Operator	First Operand	Second Operand	Result
	FALSE	TRUE	TRUE
	TRUE	NULL	TRUE
	FALSE	NULL	NULL
	NULL	TRUE	TRUE
	NULL	FALSE	NULL
	NULL	NULL	NULL

Comparison Operators

The following table describes the purpose of each comparison operator and gives an example of how it is used.

Operator	Purpose	Example
=	Tests that the first operand is equal to the second operand.	[<Last Name>] = "Smith"
< >	Tests that the first operand is not equal to the second operand.	[<Role>] <> "End-User"
>	Tests that the first operand is greater than the second operand.	[<Revenue>] > 5000
<	Tests that the first operand is less than the second operand.	[<Probability>] < .7
> =	Tests that first operand is greater than or equal to the second operand.	[<Revenue>] >= 5000
< =	Tests that the first operand is less than or equal to the second operand.	[<Probability>] <= .7
LIKE	Tests that the value of the first operand matches the specified string.	[<Last Name>] LIKE "Smith" TIP: You can use the asterisk (*) and question mark (?) pattern matching special characters with the LIKE operator.

Operator	Purpose	Example
NOT LIKE	Tests that the value of the first operand does not match the specified string.	<p>[<Last Name>] NOT LIKE "Smith"</p> <p>or</p> <p>NOT ([<Last Name>] LIKE "Smith")</p> <p>NOTE: The parentheses are required in the second example.</p> <p>TIP: You can use the asterisk (*) and question mark (?) pattern matching special characters with the NOT LIKE operator.</p>
IS NULL	Tests that the operand is null.	[<Last Name>] IS NULL
IS NOT NULL	Tests that the operand is not null.	[<Last Name>] IS NOT NULL

Pattern Matching Special Characters

The following table describes the pattern matching special characters. These special characters can be used with the LIKE and NOT LIKE comparison operators.

Character	Purpose	Example
*	Zero or more characters	<p>[<Last Name>] LIKE "Sm*" returns all records where the [<Last Name>] value starts with the characters <i>Sm</i>, as in <i>Smith</i>, <i>Smythe</i>, <i>Smart</i>, and so on.</p> <p>[<Last Name>] LIKE "*om*" returns all records where the [<Last Name>] field contains the characters <i>om</i>, as in <i>Thomas</i>, <i>Thompson</i>, <i>Tomlin</i>, and so on.</p>
?	One character	<p>[<First Name>] NOT LIKE "Da?" returns all records where the [<First Name>] value is three characters long and does not start with the letters <i>Da</i>. Records with <i>Ted</i>, <i>Tom</i>, and <i>Sam</i> are returned, but <i>Dax</i> and <i>Dan</i> are not.</p> <p>NOT ([<First Name>] LIKE "?o?") returns all records where the [<First Name>] value is three characters long and does not have as its middle character <i>o</i>. Records with <i>Ted</i> and <i>Sam</i> are returned, but <i>Tom</i> and <i>Bob</i> are not.</p>

Concatenation Operator

The + (plus) operator is used in emails to concatenate field values and text.

Precedence of Operators

Precedence is the order in which Oracle CRM On Demand evaluates the various operators within a single expression. The following rules apply:

- Operators with higher precedence are evaluated before operators with lower precedence.
- Operators with equal precedence are evaluated from left to right.
- Lower-level numbers indicate higher precedence.
- The use of parentheses affects the order of precedence within an expression. The expression within parentheses is evaluated before the expression outside the parentheses.

The levels of precedence are listed in the following table.

Level	Operator
1	()
2	- (negation)
3	^ (exponentiation)
4	* (multiplication), / (division)
5	+ (addition), - (subtraction), NOT logical operator
6	AND logical operator
7	OR logical operator
8	=, <>, >, <, >=, <= comparison operators

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Expression Builder Functions

The following table lists the functions that you can use in Expression Builder. Click the name of a function to see more information about the function.

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
IfNull (on	Duration (on page	FieldValue (on page	Locale (on page	ExcludeChannel	LN (on

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
page 1508)	1501)	1504)	1528)	(on page 1503)	page 1527)
Iif (on page 1508)	JulianDay (on page 1521)	FindNoneOf (on page 1505)	LocaleListSeparator (on page 1528)	GetGroupId (on page 1507)	
	JulianMonth (on page 1522)	FindOneOf (on page 1506)	OrganizationName (on page 1532)	GetParentId (on page 1507)	
	JulianQtr (on page 1523)	InStr (on page 1510)	UserValue (on page 1541)	JoinFieldValue (on page 1511)	
	JulianWeek (on page 1523)	Left (on page 1525)		LookupName (on page 1529)	
	JulianYear (on page 1524)	Len (on page 1526)		LookupValue (on page 1530)	
	Timestamp (on page 1537)	Mid (on page 1531)		PRE (on page 1532)	
	Today (on page 1540)	Right (on page 1534)		RowIdToRowNum (on page 1535)	
	UtcConvert (on page 1544)	ToChar (on page 1537)		RowNum (on page 1536)	

Note the following information regarding other functions:

- Some of the functions listed in the drop-down list on the Functions field in Expression Builder are for internal use only. Do not use the following functions in your expressions:
 - [GetParentId](#)
 - [IsManagerPosition](#)
 - [Lookup](#)
 - [LookupMessage](#)
 - [LOVLanguage](#)
 - [PositionId](#)
 - [PositionName](#)
- It is recommended that you use the [UserValue](#) (on page 1541) function instead of the functions listed in the following table. These functions will become obsolete.

Function	Recommended Alternative
Alias	UserValue('<Alias>')
Currency	UserValue('<CurrencyCode>')
DivisionName	UserValue('<Division>')
FirstName	UserValue('<FirstName>')
JobTitle	UserValue('<JobTitle>')
Language	UserValue('<LanguageCode>')
LanguageName	UserValue('<Language>')
LastName	UserValue('<LastName>')
LocalCurrency	UserValue('<CurrencyCode>')
LocaleName	UserValue('<Locale>')
LoginId	UserValue('<UserId>')
LoginName	UserValue('<UserSignInId>')

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)

Duration

The Duration function in Expression Builder returns a number that indicates a period in days or fractions of days as indicated by the period argument.

Syntax

Duration(period)

Result Type

Number

Arguments

The following table describes the arguments for the function.

Argument	Description
Period	<p>A string literal in the following format <i>PnYnMnDTnHnM</i>: where:</p> <ul style="list-style-type: none"> ■ <i>P</i> is the period indicator ■ <i>nY</i> specifies the number of years between 0 and 5 ■ <i>nM</i> specifies the number of months between 0 and 12 ■ <i>nD</i> specifies the number of days between 0 and 200 ■ <i>T</i> separates the date and time specifications ■ <i>nH</i> specifies the number of hours between 0 and 200 ■ <i>nM</i> specifies the number of minutes between 0 and 59

Note the following points:

- Do not specify a plus sign (+) for positive values.
- You can specify a negative duration as `-Duration(Period)`.
- Specifying seconds is not supported.
- The maximum supported duration is 'P5Y12M200DT200H59M' (that is, 5 years, 12 months, 200 days, 200 hours, and 59 minutes).
- If the number of years, months, days, hours, or minutes is zero, you can omit the number and its corresponding designator.
- If the number of years, months, or days is zero and the time component is a nonzero value, at least one of the year, month, or day components (a number and its designator) must be present.
- If none of the time components are present in the period, the *T* designator must not be included in the period.
- The designator *P* must always be present in the period.

Examples

The following are valid examples of the Duration function:

```
Duration('P0Y1M1DT2H5M')
```

```
Duration('P0Y0DT1H')
```

```
Duration('P1D')
```

```
Duration('P0Y0M0DT0H0M')
```

```
Duration('P0DT1M')
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

ExcludeChannel

The ExcludeChannel function in Expression Builder returns FALSE if the specified channel name is the channel that the request came from.

Syntax

ExcludeChannel(channel name)

Result Type

Boolean

Arguments

The following table describes the arguments for the function.

Argument	Description
channel name	The name of the channel to be excluded.

The following table describes the valid strings for use in the channel name argument.

Channel Name String	Description
Import	This channel string excludes updates performed through the import functionality and through Oracle Data Loader On Demand.
Online	This channel string excludes updates performed by user interactions through browser windows.
Mass Update	This channel string excludes updates performed through the Mass Update option on list pages.
Record Merge	This channel string excludes updates performed by record merges.
Offline	This channel string excludes updates from Oracle Offline On Demand.

Channel Name String	Description
Web Services	This channel string excludes updates from Web services.
Office	This channel string excludes updates from Oracle CRM On Demand Integration for Office.
OEI	This channel string excludes updates from Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand.
PIM	This channel string excludes updates from Oracle PIM Sync On Demand.

Examples

The following example stops a process from being triggered by a Web service request:

```
ExcludeChannel("web services")
```

The following example stops a process from being triggered by an import operation or Oracle Data Loader On Demand:

```
ExcludeChannel("Import")
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

FieldValue

The FieldValue function in Expression Builder returns the value of a field as a string.

Syntax

```
FieldValue('<field_name>')
```

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
field_name	The valid XML name or customized integration tag corresponding to the chosen field.

Examples

The following example:

```
FieldValue('<CreatedDate>')
```

returns the value of the Created Date field as a string.

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

FindNoneOf

The FindNoneOf function in Expression Builder returns the position of the first instance in the first argument (string1) that does not match any character in the second argument (string2).

Syntax

```
FindNoneOf(string1, string2)
```

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

Examples

The following example returns the value 4:

```
FindNoneOf ("abcdef", "abc")
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

FindOneOf

The FindOneOf function in Expression Builder returns the position of the first instance in the first argument (string1) of a character in the second argument (string2).

Syntax

```
FindOneOf(string1, string2)
```

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

Examples

The following example returns the value 3:

```
FindOneOf ("abcdef", "xyzc")
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)

- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

GetGroupId

The GetGroupId function in Expression Builder returns the Oracle CRM On Demand calendar-sharing group.

Syntax

GetGroupId()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

GetParentId

The GetParentId function in Expression Builder returns the Row Id of a parent record.

Syntax

GetParentId()

Result Type

String

Example

If a contact is associated with an account with Row Id 12-1A876B, the GetParentId function returns the following value:

12-1A876B

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

IfNull

The IfNull function in Expression Builder returns the value from the first argument that is passed to the function. If the first argument returns NULL, the value from the second argument is returned.

Syntax

IfNull(expr1, expr2)

Result Type

The result type of the IfNull function is the type of its first argument, even if the first argument is NULL. The second argument is converted to the type of the first argument before its value is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
expr1	A field name or expression.
expr2	The field name or expression that is returned if expr1 is NULL.

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

IIf

The IIf function in Expression Builder returns one of two parameters based on the evaluation of a conditional expression. IIf is an abbreviation for Immediate If.

Syntax

IIf(expr, result_if_true, result_if_false)

Alternate Syntax

IIf(expr, expr_if_true, expr_if_false)

Mixed Syntax

IIf(expr, result_if_true, expr_if_false)

IIf(expr, expr_if_true, result_if_false)

Result Type

The result type of the IIf() function is always the type of its first argument. If the expression evaluates to FALSE, the second argument is converted to the type of the first argument before its value is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
expr	The conditional expression that is to be evaluated.
result_if_true	The return value if the conditional expression evaluates to true.
result_if_false	The return value if the conditional expression evaluates to false.
expr_if_true	An expression to be evaluated if the conditional expression evaluates to true.
expr_if_false	An expression to be evaluated if the conditional expression evaluates to false.

Examples

The following is an example of mixed syntax in the IIf function:

A business process requires that the Region field on an account detail page is to be updated when the Billing State field is changed as follows:

If the Billing State field is changed to OK or TX, the region field is to be updated to Central. If the Billing State field is changed to CA, the Region field is to be updated to West. For all other states, the Region field is to be updated to East.

```
IIf([<PrimaryBillToState>]='OK' OR [<PrimaryBillToState>]='TX', 'Central',  
IIf([<PrimaryBillToState>]='CA', 'West', 'East'))
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

InStr

The InStr function in Expression Builder returns the position of the first occurrence of one string within another.

Syntax

InStr(string1, string2, start, end)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	Specifies the string that is to be searched. The value can be a string literal, or a field name, or an expression that returns a string.
string2	Specifies the string that is to be searched for. The value can be a string literal, or a field name, or an expression that returns a string. NOTE: The search for a string is case-sensitive.
start	(Optional) An integer that specifies the start point in string1.
end	(Optional) An integer that specifies the end point in string1.

Examples

The following example returns the value 9:

```
InStr('john.doe@company.com', '@')
```

The following example shows how the InStr function can be used in a workflow rule condition. In the workflow rule condition, the InStr function is used to determine if a specified string appears in a field on the record. If the string is found in the field, then the actions specified on the workflow rule are performed. In this example, the InStr function determines if the Subject field in a record contains the word *REVIEW*. The action on the workflow rule is performed only if the Subject field contains the word *REVIEW* in uppercase letters.

```
InStr([<Subject>], 'REVIEW') > 0
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

JoinFieldValue

A record type can be referenced by another record type through a foreign key. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. For example, on most record types, the OwnerId field is a foreign key that references the User record type. The Owner field on many records is a joined field that uses the OwnerId foreign key to reference the Alias field on the User record type.

The JoinFieldValue function in Expression Builder returns the value of a joined field when the referenced record type and the related foreign key fields are specified in the function. The JoinFieldValue function can also retrieve other fields on the referenced record type that are not directly joined to the referencing object, which allows you to look up fields across record types from related record types.

Syntax

JoinFieldValue (ref_record_type, foreign_key, field_name)

Result Type

String.

If an error occurs or the requested field value is empty, a zero-length string is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
ref_record_type	The language-independent name of the referenced record type. (A <i>language-independent name</i> is a name that does not change when the user language changes.)

Argument	Description
	<p>The argument must be enclosed in field string identifiers. For example:</p> <pre>'<Account>'</pre> <p>See the table in the Record Types section of this topic for a list of the language-independent record-type names.</p>
foreign_key	<p>A literal or expression that returns a valid row ID in the referenced record type (specified in the ref_record_type argument). If the row ID is invalid, the function returns a zero-length string. Direct field references must be enclosed in field identifiers. For example:</p> <pre>[<AccountId>]</pre>
field_name	<p>The language-independent name of a field in the referenced record type (specified by the ref_record_type argument). If the field does not exist in the referenced record type, an error is returned. The field name must be enclosed in field string identifiers. For example:</p> <pre>'<Type>'</pre>

Examples

Example 1: A business process requires a workflow rule to look up the name of the new owner when the owner of a record is changed. When the owner of a record is changed, only the OwnerId foreign key field on the record is updated. As a result, the following condition on a workflow rule does not look up the new owner of the record:

```
PRE('<Owner>') <> [<Owner>]
```

Instead, you can use the following condition in the workflow to look up the new owner of the record:

```
PRE('<Owner>') <> JoinFieldValue('<User>', [<OwnerId>], '<Alias>')
```

Example 2: To get the email address of the previous owner of a record, use the following expression:

```
JoinFieldValue('<User>', PRE('<OwnerId>'), '<EmailAddr>')
```

Example 3: To get the email address of the current owner of a record, use the following expression:

```
JoinFieldValue('<User>', [<OwnerId>], '<EmailAddr>')
```

Example 4: A business process requires that a service request email is sent to a contact. Before the email is sent, the workflow rule checks that the contact has agreed to receive emails. The workflow rule (based on the service request record type) has the following condition:

```
JoinFieldValue('<Contact>', [<ContactId>], '<NeverEmail>') <> 'Y'
```

Example 5: To get the territory of the primary account for a service request, use the following expression:

```
JoinFieldValue('<Territory>', JoinFieldValue('<Account>', [<AccountId>],
'<TerritoryId>'), '<TerritoryName>')
```

Record Types

In the following table, the Referenced Record Type column shows the language-independent names of the referenced record types that you can look up using the JoinFieldValue function. The Foreign Key column shows the foreign keys that you use to look up the referenced record type. The Record Type column shows the record types that you use to configure workflow rules where the foreign keys are exposed.

Referenced Record Type	Foreign Key	Record Type
Account	ParentAccountId	Account
Campaign	SourceCampaignId	
Contact	PrimaryContactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Territory	TerritoryId	
User	OwnerId	
Account	CompetitorId	Account Competitor
Contact	PrimaryContactId	
Account	AccountId	Account Contact
Contact	ContactId	
Contact	ContactId	Account Contact Role
Account	AccountId	Account Note
Account	AccountId	Account Team
User	UserId	
Account	AccountId	Activity
Campaign	CampaignId	
Contact	PrimaryContactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Dealer	DealerId	

Referenced Record Type	Foreign Key	Record Type
FundRequest	FundRequestId	
Lead	LeadId	
MedEdEvent	MedEdEventId	
Opportunity	OpportunityId	
Portfolio	PortfolioId	
ServiceRequest	ServiceRequestId	
User	DelegatedById	
User	OwnerId	
Contact	ContactId	Assessment
Lead	LeadId	
Opportunity	OpportunityId	
ServiceRequest	ServiceRequestId	
Account	ManufacturerId	Asset
Account	AccountId	
Contact	CustomerContactId	
Product	ProductId	
Account	AccountId	Auto Dealer Makes
Account	AccountId	Auto Sales Hours
Product	ProductId	Auto Service Hours
Product	ProductId	Call Product Detail
User	OwnerId	Call Sample Dropped
Campaign	CampaignId	Campaign
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
User	OwnerId	
Contact	ContactId	Campaign Recipients
Contact	CampaignContactId	
Campaign	CampaignId	

Referenced Record Type	Foreign Key	Record Type
Account	AccountId	Contact
Campaign	SourceCampaignId	
Contact	ManagerId	
Contact	ContactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Territory	TerritoryId	
User	OwnerId	
Contact	ContactId	Contact Note
Contact	ContactId	Contact Team
User	UserId	
Account	AccountId	Custom Object 01
Activity	ActivitiyId	
Campaign	CampaignId	
Contact	ContactId	
CustomObject1	ParentId	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Dealer	DealerId	
Fund	FundId	
Household	HouseholdId	
Lead	LeadId	
MedEdEvent	MedEdEventId	
Opportunity	OpportunityId	
Portfolio	PortfolioId	
Product	ProductId	
ServiceRequest	ServiceRequestId	
Solution	SolutionId	

Referenced Record Type	Foreign Key	Record Type
User	OwnerId	
Vehicle	VehicleId	
Account	AccountId	Custom Object 02
Activity	ActivityId	
Campaign	CampaignId	
Contact	ContactId	
CustomObject1	CustomObject1Id	
CustomObject2	ParentId	
CustomObject3	CustomObject3Id	
Dealer	DealerId	
Fund	FundId	
Household	HouseholdId	
Lead	LeadId	
MedEdEvent	MedEdEventId	
Opportunity	OpportunityId	
Portfolio	PortfolioId	
Product	ProductId	
ServiceRequest	ServiceRequestId	
Solution	SolutionId	
User	OwnerId	
Vehicle	VehicleId	
Account	AccountId	Custom Object 03
Activity	ActivityId	
Campaign	CampaignId	
Contact	ConatctId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	ParentId	
Dealer	DealerId	

Referenced Record Type	Foreign Key	Record Type
Fund	FundId	
Household	HouseholdId	
Lead	LeadId	
MedEvent	MedEdEventId	
Opportunity	OpportunityId	
Portfolio	PortfolioId	
Product	ProductId	
ServiceRequest	ServiceRequestId	
Solution	SolutionId	
User	OwnerId	
Vehicle	VehicleId	
CustomObject1	CustomObject1Id	Dealer
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Dealer	ParentDealerId	
Territory	PrimaryTerritoryId	
User	OwnerId	
Dealer	ChannelPartnerId	Dealer Territory
CustomObject1	CustomObject1Id	Fund
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Fund	FundId	
User	PrimaryOwnerId	
Fund	FundId2	Fund Participant
Campaign	CampaignId	Fund Request
Contact	PrimaryContactId	
Fund	FundId	
FundRequest	OwnedByEmployeeId	

Referenced Record Type	Foreign Key	Record Type
User	FundOwnerId	
User	OwnerId	
Account	AccountID	Household
Contact	PrimaryContactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Household	OwnerGroupId	
Campaign	CampaignId	Household Contact
Account	AccountId	Lead
Campaign	CampaignId	
Contact	ContactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Opportunity	OpportunityId	
User	OwnerId	
User	SalesRepId	
User	ReferredById	
Product	ProductId	MedEd Event
User	OwnerId	
Account	AccountId	Opportunity
Campaign	SourceCampaignId	
Contact	KeyContactId	
Contact	ConatactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	

Referenced Record Type	Foreign Key	Record Type
Dealer	DealerId	
Territory	TerritoryId	
User	OwnerId	
Contact	PrimaryContactId	Opportunity Competitor
Opportunity	CompetitorId	
Contact	ContactId	Opportunity Contact Role
Opportunity	OpportunityId	
OpportunityId	OptyId	Opportunity Note
Contact	PrimaryContactId	Opportunity Partner
Opportunity	PartnerId	
User	OwnerId	
Opportunity	OptyId	Opportunity Team
User	UserId	
Account	ParentAccountId	Partner
Campaign	SourceCampaignId	
Territory	TerritoryId	
User	ChannelAccountManagerId	
User	OwnerId	
Account	AccountId	Portfolio
Account	InstitutionId	
Contact	PrimaryContactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Portfolio	OwnerGroupId	
Portfolio	ParentPortfolioAccountId	
Product	ParentProductId	
Product	ProductId	

Referenced Record Type	Foreign Key	Record Type
User	OwnerId	Portfolio Owner
Contact	ContactId	
Portfolio	PortfolioId	Product
Product	ParentProductId	
Account	OpportunityAccountId	Revenue
Asset	AssetId	
Contact	ContactId	
Opportunity	OpportunityId	
Product	ProductId	
User	OwnerId	
Account	AccountId	Service Request
Asset	AssetId	
Contact	ContactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Dealer	DealerId	
Product	ProductId	
User	OwnerId	Solution
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	
Product	ProductId	Vehicle
Account	AccountId	
Contact	PrimaryContactId	
CustomObject1	CustomObject1Id	
CustomObject2	CustomObject2Id	
CustomObject3	CustomObject3Id	

Referenced Record Type	Foreign Key	Record Type
Product	ProductId	
Dealer	SellingDealerId	
Dealer	ServicingDealerId	
User	OwnerId	

In addition, the following foreign key fields are common to all record types, and they reference the following user record types:

- CreatedById
- ModifiedById

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

JulianDay

The JulianDay function in Expression Builder returns the number of days that have elapsed since noon Universal Time, January 1, 4713 BC.

Syntax

JulianDay(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianDay(Today())</p>

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

JulianMonth

The JulianMonth function in Expression Builder returns an integer that is equal to:

$$JulianYear * 12 + current_month$$

where *JulianYear* is the year that is returned by the [JulianYear](#) (on page 1524) function, *current_month* is an integer from 1-12, and January is 1.

Syntax

JulianMonth(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianMonth(Today())

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

JulianQtr

The JulianQtr function in Expression Builder returns an integer that is equal to:

$$JulianYear * 4 + current_quarter$$

where *JulianYear* is the year returned by the [JulianYear](#) (on page 1524) function, and *current_quarter* is:

$$(current_month - 1) / 3 + 1$$

rounded down to the next integer.

Syntax

JulianQtr(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianQtr(Today())</p>

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

JulianWeek

The JulianWeek function in Expression Builder returns an integer that is equal to:

$$JulianDay / 7$$

rounded down to the next integer, where *JulianDay* is the day that is returned by the [JulianDay](#) (on page 1521) function.

Syntax

JulianWeek(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianWeek(Today())

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

JulianYear

The JulianYear function in Expression Builder returns an integer that is equal to:

current_year + 4713

Syntax

JulianYear(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
----------	-------------

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianYear(Today())</p>

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Left

The Left function in Expression Builder returns a specified number of characters from the left side of a string.

Syntax

Left(string, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the leftmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to return. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

Examples

If the current user's email address is john.doe@oracle.com, the following example returns the value john:

```
Left(UserValue('<EmailAddr>'), 4)
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Len

The Len function in Expression Builder returns the number of characters in a specified string.

Syntax

Len(string)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are counted. If the string is blank, 0 (zero) is returned. If the string contains Null, Null is returned.

Examples

The following example returns the value 18:

```
Len("Oracle Corporation")
```

The following example returns the value 19 if the field contains a valid timestamp:

```
Len([<CreateDate>])
```

The following example returns the value 19:

```
Len(Timestamp()) returns 19
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

LN

The LN function in Expression Builder returns the natural log of the number passed in the argument.

Syntax

LN(number)

Result Type

Number

Arguments

The following table describes the arguments for the function.

Argument	Description
number	The number for which the natural log is to be returned.

Examples

The following example:

LN(10)

returns the value 2.30.

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Locale

The Locale function in Expression Builder returns the locale code for the signed-in user, for example, ENU.

Syntax

Locale()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

LocaleListSeparator

The LocaleListSeparator function in Expression Builder returns the list separator character for the current locale, for example, a comma (,).

Syntax

LocaleListSeparator()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

LookupName

The LookupName function in Expression Builder finds a row in the List of Values table where all of the following are true:

- The TYPE field matches the type argument.
- The CODE field matches the lang_ind_code argument.
- The LANG_ID field matches the language code of the currently active language.

This function returns the untranslated value (the language independent code) of the display value in the specified List of Values.

TIP: When specifying the parameters for the LookupName function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for a variety of data that the field can hold.)

Syntax

LookupName(type, lang_ind_code)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.
lang_ind_code	The display value.

Example

If CALIFORNIA is the display value and CALIF is the language independent code, both of the following examples return the value CALIF:

```
LookupName('STATE_ABBREV', 'CALIFORNIA')
```

```
LookupName('STATE_ABBREV', 'CALIF')
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)

- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

LookupValue

The LookupValue function in Expression Builder returns a specified picklist value that is translated into the currently active language.

Picklist values are stored in the List of Values table. The LookupValue function returns the value in the VAL column of a row where all of the following are true:

- The TYPE column matches the type argument.
- The CODE column matches the lang_ind_code argument.
- The LANG_ID column matches the language code of the currently active language.

The LookupValue function allows Oracle CRM On Demand to evaluate expressions involving picklist values uniformly across locales. For example, the value *White* in English is evaluated in the same way as the value *Blanc* in French.

TIP: When specifying the parameters for the LookupValue function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for different data that the field can hold.)

NOTE: The Sales Stage field in opportunity records is not a true picklist field. The LookupValue function does not work on this field.

Syntax

LookupValue (type, lang_ind_code)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.
lang_ind_code	The untranslated value in the list of values.

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Mid

The Mid function in Expression Builder returns a specified number of characters from a string.

TIP: To determine the number of characters in a string, use the [Len](#) (on page 1526) function.

Syntax

Mid(string, start, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are returned. If the string contains Null, a blank string is returned.
start	The field name or expression that specifies the character position in the string at which the length count begins. If the value of the start argument is greater than the number of characters in the string, the Mid function returns a blank string.
length	Optional. The field name or expression that specifies the number of characters to return. If this argument is not used, or the length specified is greater than the number of characters that can be returned, all characters from the start position to the end of the string are returned.

Examples

The following example returns seven characters (Builder), beginning with the twelfth character in a string:

```
Mid("Expression Builder is easy!!", 12, 7)
```

The following examples return seven characters, beginning with the twelfth character from a text field that contains the text: *Expression Builder is easy!!*

```
Mid('<TextFieldName>',12, 7)
```

or

```
Mid([<TextFieldName>],12, 7)
```

The following example extracts the domain name from an email address:

```
Mid([<CreatedbyEmailAddress>],FindOneOf([<CreatedbyEmailAddress>], "@") + 1,  
Len([<CreatedbyEmailAddress>]))
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

OrganizationName

The OrganizationName function in Expression Builder returns the organization name of the signed-in user.

Syntax

```
OrganizationName()
```

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

PRE

The PRE function in Expression Builder returns the previous value of the specified field when the field value is modified but before the value is updated in the database.

CAUTION: It is strongly recommended that you do not use the PRE function with workflow rules containing a Wait action, because the Wait action affects the PRE function. Any actions following the Wait action are not performed until the specified wait period has expired. The remaining actions are performed in a different batch operation than the operation where the rule was originally triggered, and the values of the fields on the record prior to the action that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of the field are always considered to be the same.

Syntax

PRE('<fieldname>')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
fieldname	The name of the field that was modified.

The following considerations apply when using the PRE function:

- In conditional expressions, such as workflow conditions and validation statements, when you use the PRE function to retrieve the previous value of a field, remember that the initial value of the field can be blank (that is, a null value). If the initial value is null, any comparison with a non-null value results in unpredictable behavior. To ensure that conditional expressions are evaluated correctly in such cases, use the PRE function with the IfNull function as shown in this example:

```
IfNull([<FieldName>], "Invalid") <> IfNull(PRE('<FieldName>'), "Invalid")
```

In this example, the text string *Invalid* is used to replace the null value, but you can use any string that you want, provided that the string does not exist as a value in the field that is being examined.

- If the PRE function is used in a workflow rule or action that is invoked after a Wait action, the function does not return the previous value of a field. However, you might have a business process that requires such comparisons. In such cases, you can use a workflow rule with the Before Modified Record Saved trigger event to store the previous value of a field in any unused field on the record type. You can then use the stored field value for any comparisons you require in workflow rules that have the Wait action.

When you create the workflow rule to store the previous value of a field in an unused field on the record type, remember that the previous value of the original field might be blank (that is, a null value). Therefore, you must use an expression such as the following to store a default value if a null value is encountered:

```
IfNull([<FieldName>], "Invalid")
```

In this example, the text string *Invalid* is the default value that is used to replace a null value, but you can use any string you want, provided that the string does not exist as a value in the original field.

Example of Creating a Workflow Rule That Sends an Email to the Previous Owner of an Account Record

The following is an example of how to create a workflow rule that sends an email to the previous owner of an account record when the owner of the record is changed.

To create a workflow rule that sends an email to the previous owner of an account record

- 1** Create a workflow rule for the Account record type with the When Modified Record Saved trigger event.
- 2** Save the workflow rule.
- 3** Create an Add an Email action on the workflow rule.
- 4** On the workflow action, do the following:
 - a** In the To field, select Specific Email Address.
 - b** In the To field expression text box, add the following expression:
`JoinFieldValue('<User>', IfNull(PRE('<OwnerId>'), "admin@mycompany.com"), '<EMailAddr>')`
 - c** Add the necessary text in the subject and body of the email.
 - d** Save the workflow action.

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Right

The Right function in Expression Builder returns a specified number of characters from the right side of a string.

Syntax

Right(string, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the rightmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to return. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

Examples

If the current user's email address is john.doe@oracle.com, the following example returns the value oracle.com:

```
Right(UserValue('<EmailAddr>'),  
Len(UserValue('<EmailAddr>'))-InStr(UserValue('<EmailAddr>'),'@'))
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

RowIdToRowNum

The RowIdToRowNum function in Expression Builder converts an alphanumeric Row ID to a numeric format.

NOTE: Row IDs are generated by Oracle CRM On Demand using a proprietary algorithm, and have full referential integrity across the Oracle CRM On Demand database. The algorithm uses Base-36 encoding, a positional numeral system where the radix is 36. Using 36 as the radix allows the digits to be represented by the numbers 0-9 and the letters A-Z, which is an optimized, case-insensitive alphanumeric numeral system, based on ASCII characters.

Syntax

```
RowIdToRowNum('row_id')
```

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
row_id	The string literal, field name, or expression that returns an alphanumeric row ID.

Examples

The following example:

```
RowIdToRowNum('12-6RX8L').
```

returns the value 38-8021253.

The following example:

```
RowIdToRowNum('12-Y09KG')
```

returns the value 38-57119344.

If the <AccountID> field contains '12-Y09KG', the following example:

```
RowIdToRowNum('<AccountID>')
```

returns the value 38-57119344.

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

RowNum

The RowNum function in Expression Builder returns the position of the record within the active set of records.

Syntax

```
RowNum()
```

Result Type

Integer

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Timestamp

The Timestamp function in Expression Builder returns the server date and time converted to the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Timestamp function converts the server time to EDT. The TimeStamp function performs UTC (universal time code) conversion.

NOTE: Arithmetic operations (for example, add or subtract) are not supported with the Timestamp() function.

Syntax

Timestamp()

Result Type

Date Time

Examples

The following example returns the current date and time, in the format month/day/year hours24:minutes:seconds:

```
Timestamp()
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

ToChar

The ToChar function in Expression Builder converts a specified date or numeric expression to a formatted string.

Syntax

ToChar(expression, format)

CAUTION: Do not use both date formats and number formats in an instance of the ToChar function. Doing so can lead to invalid results.

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
expression	An expression or field that returns a date, date and time, or a numeric value.
format	A string that represents the date or number format.

The following table describes the date formats for the function.

Format Code	Description
DD	A two-digit day of month (01-31).
DDDD dddd	The name of the day.
MM	A two-digit month number (01-12 where 01 is JAN). You must use <i>MM</i> in uppercase, because <i>mm</i> in lowercase indicates minutes.
MMMM mmmm	The name of the month. Note that if you use lowercase, you must use <i>mmmm</i> (that is, the letter m in lowercase, four times), because <i>mm</i> (that is, the letter m in lowercase, twice) indicates minutes.
Y	The last digit of the year.
YY	The last two digits of the year.
YYYY	A four-digit year.
hh12	The hour of day in 12-hour format.
hh24	The hour of day in 24-hour format.

Format Code	Description
hh	The hour of the day. You can specify AM or PM to adjust the time accordingly, for example: hh:mm:ss PM If you do not specify AM or PM, the 24-hour format is used by default.
mm	The minutes. Note that mm (that is, the letter m in lowercase, twice) always indicates minutes and cannot be used to specify a two-digit day of the month.
ss	The seconds.

The following table describes the number formats for the function.

Format Code	Example	Description
#	####	Returns the value with the specified number of digits, with a leading minus sign if the value is negative.
0	####.00	Returns leading zeros. Returns trailing zeros.
\$	\$####.00	Returns the value with a leading dollar sign.
,	#,###	Returns a comma in the specified position. A comma cannot appear to the right of the decimal point. The format model must not begin with a comma.
.	###.##	Returns a decimal point in the specified position. Only one decimal point is allowed in the format parameter. If the number of digits specified after the decimal point is less than the number of digits available after the decimal point, the decimal will be rounded up.

Examples Using Number Formats

The following example returns the value 10:

```
ToChar (10, '###.##')
```

The following example returns the value 10:

```
ToChar (10, '##.00')
```

The following example returns the value 10.24:

```
ToChar (10.2388, '##.00')
```

The following example returns the value -10.24

```
ToChar (-10.2388, '###.##')
```

Examples Using Date Formats

The following example converts the value returned by the Timestamp() function into DD/MM/YYYY format:

```
ToChar(Timestamp(), 'DD/MM/YYYY')
```

For example, if the Timestamp() function returns a value of 02/29/2008 10:58:37, the previous expression evaluates to 29/02/2008.

The following examples show how midnight is shown using various formats:

ToChar(Today(), YYYY/MM/DD hh:mm:ss PM) returns 2009/05/22 12:00:00 AM

ToChar(Today(), YYYY/MM/DD hh:mm:ss) returns 2009/05/22 00:00:00

ToChar(Today(), YYYY/MM/DD hh24:mm:ss PM) returns 2009/05/22 00:00:00

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Today

The Today function in Expression Builder returns today's date based on the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Today() function converts the server day to EDT. The Today() function performs UTC (universal time code) conversion.

Syntax

Today()

Result Type

Date

Examples

If the current date is 11/27/2007, the following example:

```
Today() - 30
```

returns the value 10/28/2007.

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

UserValue

The UserValue function in Expression Builder returns the value of a specified attribute for the current user.

The fields on the User Detail view are attributes of the selected user.

Syntax

UserValue('<attribute>')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
attribute	The language-independent name or customized integration tag that corresponds to the display name of the current user attribute.

Examples

Example1: A business process requires that a custom text field called Origin on a service request is to display by default the country of the user who creates the record (the current user) when the record is created.

To implement the business rule, in the Field Setup page for service requests, set the default value for the Origin field to UserValue('<PersonalCountry>'), and select the Post Default check box.

For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 1043).

Example 2: A business process requires that a certain workflow rule is triggered if the owner of an opportunity is not the administrator.

To implement the business rule, set up the following condition on the workflow rule:

UserValue('<EMailAddr>') <> 'administrator@testdata.com'

Attributes

The following table lists the attributes that can be used as arguments in the UserValue function, and their corresponding display names.

Attribute	Display Name	Sample Value
Alias	Alias	Admin
AuthenticationType	Authentication Type	User ID/Password Only
BusinessUnit	Business Unit	Business Unit
BusinessUnitLevel1	Business Unit Level 1	Business Unit L1
BusinessUnitLevel2	Business Unit Level 2	Business Unit L2
BusinessUnitLevel3	Business Unit Level 3	Business Unit L3
BusinessUnitLevel4	Business Unit Level 4	Business Unit L4
CellPhone	Cellular Phone #	+1 555 2368978
CreatedBy	Created By	Oracle CRM On Demand CSR Admin
CreatedById	Not available	1E1263-IZBZ
CreatedDate	Created Date	01/08/2007 21:21:33
CurrencyCode	Currency	USD
Department	Department	Department
Division	Division	Division
EMailAddr	Email	john.doe@oracle.com
EmployeeNumber	Employee Number	12345
EnableTeamContactsSync	Enable Sync of Team Contacts	Y
ExternalIdentifierForSingleSignOn	External Identifier for Single Sign-On	UID=ADMIN,O=ORACLE
ExternalSystemId	External Unique ID	EXTUID123
FirstName	First Name	John
FundApprovalLimit	Fund Approval Limit	50000
IntegrationId	Integration ID	INTUID123
JobTitle	JobTitle	Product Manager
Language	Language	English-American

Attribute	Display Name	Sample Value
LastLoggedIn	Last Sign In	10/31/2007 19:39:01
LastName	Last Name	Doe
LeadLimit	Lead Limit	2345679
Locale	Locale	English - Canada
ManagerFullName	Reports To	John Smith
ManagerId	Not available	1E4763-IZAU
Market	Market	Market
MiddleName	Middle Name	Middle
MiscellaneousNumber1	Miscellaneous Number 1	2312
MiscellaneousNumber2	Miscellaneous Number 2	2312
MiscellaneousText1	Miscellaneous Text 1	DUNS # (Webcat) = 10461
MiscellaneousText2	Miscellaneous Text 2	a7cff064-6566-47a2-8629-8b32d92de222
ModifiedBy	Modified By	John Doe
ModifiedById	Not available	1E1263-IZBZ
ModifiedDate	Modified Date	10/31/2007 19:32:58
MrMrs	Mr./Ms.	Mr.
NeverCall	Never Call	Y
NevereMail	Never Email	Y
NeverMail	Never Mail	Y
PasswordState	Password State	Active
PersonalCity	City	Toronto
PersonalCountry	Country	Canada
PersonalPostalCode	Postal Code	M4C2C3
PersonalProvince	Province	Ontario
PersonalState	State/Province	CA
PersonalStreetAddress	Street	555 Main Avenue
PersonalStreetAddress2	Address 2	Suite 17
PersonalStreetAddress3	Address 3	Scarborough

Attribute	Display Name	Sample Value
PhoneNumber	Work Phone #	+1 555 2365555
PrimaryGroup	Primary Group	User Group A
Region	Region	My Region
Role	Role	Field Sales Rep
RoleId	Role Id	1E1263-IYG1
SecondaryEmail	Secondary Email	john.doe2@oracle.com
ShowWelcomePage	Show Welcome Page on Sign In	N
Status	Status	Active
SubMarket	Submarket	My submarket
SubRegion	Subregion	My sub region
TempPasswordFlag	Email Temporary Password When I Click Save	Y
TimeZoneName	Time Zone	(GMT-05:00) Eastern Standard Time (US & Canada)
UserId	Row Id	1E1263-IZAU
UserLoginId	Row Id	1E1263-IZAU
UserSignInId	User Sign In ID	PTE169-14/ADMIN
WorkFax	Work Fax #	+1 555 2365556

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

UtcConvert

The UtcConvert function in Expression Builder converts the specified date and time from the current user's time zone setting, and returns the date and time in the specified time zone.

Syntax

UtcConvert(utc_date_time, time_zone)

Result Type

Time

Arguments

The following table describes the arguments for the function.

Argument	Description
utc_date_time	The date and time according to the current user's time zone setting in the format: MM/DD/YYYY HH24:MI:SS
time_zone	The name of a time zone

Examples

If the current user's time zone setting is (GMT-05:00) Eastern Time (US & Canada), the following example:

```
UtcConvert('12/14/2007 17:07:05', 'Pacific Standard Time')
```

returns the following value:

12/14/2007 12:07:05

If the current user's time zone setting is (GMT+05:30) Calcutta, Chennai, Mumbai, New Delhi, the following example:

```
UtcConvert('12/14/2007 15:07:05', 'Eastern Standard Time')
```

returns the following value:

12/14/2007 04:37:05

The following examples show how to get the corresponding UTC time for Western European Time:

```
UtcConvert(Timestamp(), "(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna")
```

```
UtcConvert(Timestamp(), "W. Europe Daylight Time")
```

```
UtcConvert(Timestamp(), "W. Europe Standard Time")
```

The following examples show how to get the corresponding UTC time for South African Time:

```
UtcConvert(Timestamp(), "(GMT+02:00) Harare, Pretoria")
```

```
UtcConvert(Timestamp(), "South Africa Daylight Time")
```

```
UtcConvert(Timestamp(), "South Africa Standard Time")
```

If the name of a time zone contains a special character, such as a single quotation mark (') or a comma (,), you must enclose the name of the time zone, or the special character, in double quotation marks. For example:

```
%%UtcConvert('08/03/2009 12:01:33', "(GMT+13:00) Nuku" + "'" + "alofo")%%
```

```
%%UtcConvert('08/03/2009 12:01:33', "(GMT+13:00) Nuku'alofa")%%
```

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

Expression Builder Examples

In Expression Builder, you can use the sample expressions in the following table.

Expression Builder Sample Expressions	
Update the field Opportunity Margin	
Description	Update the field Opportunity Margin
Syntax	[<OpportunityMargin>] = [<OpportunityRevenue>] - [<OpportunityCost>]
Validate small deals	
Description	Field Validation. 'Small Deal' cannot have revenue greater than 1,000,000
Syntax	<= IIf (FieldValue('<OpportunityCategory>') = 'Small Deal', 1000000, [<Revenue>])
Assign a newly-created Service Request to the creator	
Description	Whenever a Service Request is created, set UserId as the default for the Service Request field 'Owned By Id'.
Syntax	[<OwnerId>] = UserValue('<UserId>')
Check if the values of specified fields have changed	
Description	Check for changes in field values
Syntax	(PRE('<ActualCost>') <> [<ActualCost>]) OR (PRE('<BudgetedCost>') <> [<BudgetedCost>])
Trigger a workflow based on a close date	
Description	If the close date is modified by more than a month, execute the workflow.

Syntax	<code>([<CloseDate>] - PRE('<CloseDate>')) > 30</code>
Trigger a workflow if an opportunity reaches a certain stage without a contact	
Description	If an opportunity reaches the Closed/Won sales stage without having a contact, execute the workflow.
Syntax	<code>FieldValue('<SalesStage>') = "Closed/won" AND PRE('<SalesStage>') <> [<SalesStage>] AND [<KeyContactId>] = "No Match Row Id"</code>
Trigger a workflow when a check box is selected	
Description	If the custom Ready for Review check box field is selected, execute the workflow.
Syntax	<code>FieldValue('<bReady_for_Review_ITAG>') = 'Y' AND (PRE('<bReady_for_Review_ITAG>') = 'N' OR IfNull(bReady_for_Review_ITAG, 'Y') = 'Y')</code>
Trigger an email when Activity workflow is created by someone other than the owner	
Description	Trigger an email to the activity owner when an Activity workflow is created by someone other than the owner
Syntax	<code>[<OwnerId>] <> UserValue('<UserId>')</code>
Trigger an email when Account type is changed	
Description	Trigger an email when Account type is changed from "Prospect" to "Customer"
Syntax	<code>PRE('<AccountType>') = "Prospect" AND FieldValue('<AccountType>') = "Customer"</code>
Exclude a specific channel from a workflow	
Description	Do not execute a workflow for an online record
Syntax	<code>PRE('<CampaignType>') = "Advertisement" AND ExcludeChannel("Online")</code>

Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 1486)
- [Using Expression Builder](#) (on page 1487)
- [Expression Builder Functions](#) (on page 1499)

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