ORACLE CRM On Demand

Configuration Guide for Oracle CRM On Demand Financial Services Edition

Release 20

June 2012

Contents

1 What’s New in This Release

What’s New in Configuration Guide for Oracle CRM On Demand Financial Services Edition, Release 20

Table 1 lists changes in this version of the guide to support this release of the software.

Table 1. What’s New in Configuration Guide for Oracle CRM On Demand Financial Services Edition, Release 20

Topic	Description
“Setting Up Access Profiles for Financial Services Roles” on page 74	Updated topic. It now includes custom objects for financial accounts.

2 Configuration Overview of Oracle CRM On Demand Financial Services Edition

This chapter provides an overview of configuring Oracle CRM On Demand Financial Services Edition. It includes the following topics:

- About Oracle CRM On Demand Industry Editions on page 9
- About Configuring Oracle CRM On Demand Financial Services Edition on page 9

About Oracle CRM On Demand Industry Editions

Oracle CRM On Demand provides industry-specific capabilities for the following industries:

- Automotive
- Financial services (for example, banking, wealth management, and insurance)
- High technology
- Life sciences

These capabilities help customers to meet industry-specific business needs.

About Configuring Oracle CRM On Demand Financial Services Edition

If your company wants to use Oracle CRM On Demand Financial Services Edition, you must first contact Customer Care and request that the industry-specific functionality is set up for your company. This initial setup process, which is referred to as *provisioning*, is performed by Customer Care. The provisioning process for Oracle CRM On Demand Financial Services Edition exposes Web pages, features, and fields, which can differ from the standard application, but are relevant to your business.

As part of the provisioning process for Oracle CRM On Demand Financial Services Edition, Customer Care creates the Financial Administrator role, and assigns it to your company administrator. This role gives company administrators the privileges and access options that they must allow to configure the application, create other roles, and grant the same privileges and access options to those other roles, as required. These tasks are described in "Configuring Oracle CRM On Demand Financial Services Edition" on page 11.

Customer Care can also set up other features in your application, including the following:

- Custom objects and company branding
- How your company accesses Oracle CRM On Demand

- How your company manages large volumes of data

This guide describes the tasks that are typically performed to configure Oracle CRM On Demand Financial Services Edition. The configuration settings described in this guide are suggested settings for Oracle CRM On Demand Financial Services Edition. Your company requirements might differ from the suggested settings.

This guide describes only those tasks that are specific to the configuration of Oracle CRM On Demand Financial Services Edition. For information about configuring and setting up the standard edition of Oracle CRM On Demand Financial Services Edition, the *Oracle CRM On Demand Online Help*.

3 Configuring Oracle CRM On Demand Financial Services Edition

This chapter describes how to configure Oracle CRM On Demand Financial Services Edition, and set up a typical role in Oracle CRM On Demand Financial Services Edition. The chapter includes the following topics:

As part of the process of provisioning Oracle CRM On Demand Financial Services Edition, Customer Care creates the Financial Administrator role, and assigns it to your company administrator. The Financial Administrator role gives company administrators the privileges and access options that they must allow to configure Oracle CRM On Demand Financial Services Edition, create other roles, and grant the same privileges and access options to the other roles, as required.

The configuration settings described in this chapter are the suggested settings for Oracle CRM On Demand Financial Services Edition and for a typical role defined in Oracle CRM On Demand Financial Services Edition (the Financial Advisor role). Your company requirements might differ from the settings suggested in this chapter. Before you start to configure Oracle CRM On Demand Financial Services Edition, determine the fields, page layouts, access profiles, and roles that you must configure to support your company's business needs.

Process of Configuring Oracle CRM On Demand Financial Services Edition

To configure Oracle CRM On Demand Financial Services Edition, perform the following tasks:

1. If you have not already done so, contact Customer Care, and ask a service representative to provision your application to use Oracle CRM On Demand Financial Services Edition.

   When Customer Care tells you that your application has been provisioned, go to Step 2.

2. Log in to Oracle CRM On Demand.

3. Configure the field setup.

   For more information, see "Configuring Field Setup for Oracle CRM On Demand Financial Services Edition" on page 13.

4. Configure the cascading picklists.

   For more information, see "Configuring Field Setup for Oracle CRM On Demand Financial Services Edition" on page 13.

5. Set up the page layouts for each role that you plan to create for Oracle CRM On Demand Financial Services Edition.

   For more information, see "Setting Up Page Layouts for Oracle CRM On Demand Financial Services Edition" on page 53.

6. Modify the search layouts.

   For more information, see "Modifying Search Layouts for Oracle CRM On Demand Financial Services Edition" on page 67.

7. Modify the sales stages.

   For more information, see "Modifying Sales Stages for Oracle CRM On Demand Financial Services Edition" on page 73.

8. Set up the access profiles for the roles that you plan to create.

   For more information, see "Setting Up Access Profiles for Financial Services Roles" on page 74.

9. Create the roles for Oracle CRM On Demand Financial Services Edition.

   For more information, see "Creating Financial Services Roles" on page 78.

10. (Optional) Configure custom objects for the Policy record.

    For more information, see "Configuring Custom Objects for Policies" on page 81.

11. (Optional) Configure books.

    For more information, see "Configuring Books" on page 82.

12. (Optional) Configure My Team Policies List.

    For more information, see "Configuring My Team Polices List" on page 83.

Configuring Field Setup for Oracle CRM On Demand Financial Services Edition

In Oracle CRM On Demand Financial Services Edition, there are 14 record types for insurance and financial services that have preconfigured fields for use in financial services industries. You can use these fields to add additional custom fields. You can configure these record types only if it is required for your company's specific needs. The 14 record types are:

- Insurance
  - Broker Profile
  - Claim
  - Coverage
  - Damage
  - Insurance Property
  - Involved Party
  - Policy
  - Policy Holder
- Financial Services
  - Financial Account
  - Financial Account Holders
  - Financial Account Holdings
  - Financial Plan
  - Financial Product
  - Financial Transaction

For information about each of these record types, see *Oracle CRM On Demand Online Help*.

This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

To configure field setup for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to Admin and then Application Customization.
2. In the Record Type Setup section, click the link for the required record type, for example, Contact.
3. In the Field Management section, click the required Field Setup link, for example, Contact Field Setup.
4. On the Fields page, click New Field, Rename Fields, the Edit link or the Edit Picklist link, as necessary, and set up the fields as required to support your business processes.

For more information about field types and additional properties, see *Oracle CRM On Demand Online Help*.

Record Types for Oracle CRM On Demand Financial Services Edition

In the Oracle CRM On Demand Financial Services Edition, it is recommended you configure the field setup for the following record types:

- Activity
- Appointment
- Broker Profile
- Claim
- Contact
- Contact Interests
- Coverage
- Financial Account
- Financial Plan
- Financial Products
- Financial Transactions
- Household
- Insurance Property
- Involved Party
- Lead
- Opportunity
- Policy
- Policy Holder
- Service Request

For more information about configuring the record types listed, see "Configuring Field Setup for Oracle CRM On Demand Financial Services Edition" on page 13.

Activity Record Type

The Activity record type allows insurance professionals to capture additional information about activities such as call results and the type of call.

CAUTION: If you make a field required in the Activity Fields page, that field will be required for both the Task and Appointment record types. If you want to make a field required for Task but not Appointment, leave the field as not required in the Activity Fields page, and in step 2 of the Task Page Layout wizard, set the field as required. This ensures that the field is required for the Task record type, but not for the Appointment record type.

Table 2 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 2. Activity Record Type Fields

Field Name	Action
Call Result	Add picklist values: ■ No Reach ■ Appointment ■ Stay in Touch ■ Dead File ■ Not Applicable
Type	Add picklist values: ■ Birthday Call ■ Referral Call ■ Review Call ■ Lunch

Appointment Record Type

The Appointment record type allows insurance professionals to capture additional information about appointments, such as new opportunities or the number of referrals.

Table 3 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 3. Appointment Record Type Fields

Field Name	Action
Appointment Rescheduled	Create a new check box field.
New Fact Finder	Create a new check box field.
New Opportunity	Create a new check box field.
Closing Interview	Create a new check box field.
Number of Referrals	Create a new Integer field.

Broker Profile Record Type

The Broker Profile record type allows insurance professionals to capture demographic information about the broker such as broker name, address, phone numbers, fax number, Web site, description of business, and so on.

Table 4 shows the fields values that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 4. Broker Profile Record Type Fields

Field Name	Action
Sub Channel	Add picklist values: ■ Globals ■ Locals ■ Nationals ■ Regionals ■ Wholesalers
Segmentation	Add picklist values: ■ Commercial ■ Growth ■ Retail

Table 4. Broker Profile Record Type Fields

Field Name	Action
Broker Profile Year	Add picklist values: ■ 2000 ■ 2001 ■ 2002 ■ 2003 ■ 2004 ■ 2005 ■ 2006 ■ 2007 ■ 2008 ■ 2009 ■ 2010 ■ 2011 ■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020

Contact Record Type

Table 5 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 5. Contact Record Type Fields

Field Name	Action
Annual Revenue	Create a new currency type field.
Assets Under Management	Create a new currency type field.
Best times to call	Create a new multiselect picklist field with the following values: ■ Early afternoon ■ Early morning ■ Evening ■ Later afternoon ■ Mid-morning ■ Noon ■ Saturday ■ Sunday ■ Weekend
Customer Since	Create a new date type field.
Employer	Create a new text (short) type field.
Goal - Priority 1	Create a new picklist field with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation

Table 5. Contact Record Type Fields

Field Name	Action
Goal - Priority 2	Create a new picklist field with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation
Goal - Priority 3	Create a new picklist field with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation

Table 5. Contact Record Type Fields

Field Name	Action
Goal - Priority 4	Create a new picklist field with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation
Goal - Priority 5	Create a new picklist field with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation
Investable assets	Create a new currency type field.

Table 5. Contact Record Type Fields

Field Name	Action
Investment mix	Create a new multiselect picklist field with the following values: ■ Agencies ■ Alternatives ■ Bonds ■ Currencies ■ Equities ■ Futures ■ Hedge funds ■ Limited partnerships ■ Managed futures ■ Money markets ■ Mutual funds ■ Options ■ Structured products ■ Treasuries
Potential Revenue	Create a new currency type field.
Total Life Insurance	Create a new currency type field.
Status	Add the picklist values with: ■ Active ■ Quiet Filed ■ Dead Filed
Account	Rename to Business Account.
Call Frequency	Edit the picklist values as follows: ■ Annually ■ Bi-monthly ■ Monthly ■ Quarterly ■ Semi-annually

Table 5. Contact Record Type Fields

Field Name	Action
Contact Type	Edit the picklist values as follows: ■ Center of Influence ■ Client ■ Customer ■ Colleague ■ Dead End ■ Friend ■ Lead ■ Prospect
Customer ID	Rename to Contact ID.
Experience Level	Rename to Investing Experience. Edit the picklist values as follows: ■ Expert ■ Limited ■ None ■ Professional ■ Proficient
Investment Horizon	Edit the picklist values as follows: ■ Less than 5 Years ■ 5 to 10 Years ■ 10 to 15 Years ■ 15 to 20 Years ■ More than 20 Years

Table 5. Contact Record Type Fields

Field Name	Action
Lead Source	Rename to Source. Edit the picklist values as follows: ■ Advertisement ■ Direct Mail ■ Email ■ Event - Client Appreciation ■ Event - Other ■ Event - Seminar ■ Event - Trade Show ■ List - Purchased ■ List - Rented ■ Other ■ Referral - Client ■ Referral - External ■ Referral -Other ■ Web Site
Primary Group	Rename to Advisor Team
Risk Profile	Rename to Risk Tolerance. Edit the picklist values as follows: ■ Aggressive ■ Conservative ■ Moderate
Tier	Rename to Book Segment. Edit the picklist values as follows: ■ Diamond ■ Platinum ■ Gold ■ Silver ■ Unassigned
Total Net Worth	Rename to Net Worth.

Contact Interests Record Type

Table 6 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 6. Contact Interests Record Type Fields

Field Name	Action
Interests	Rename to Category. Edit the picklist values as follows: ■ Culture ■ Food and Wine ■ Hobby ■ Investments ■ Physical Fitness ■ Professional Sports ■ Public Service ■ Travel

Table 6. Contact Interests Record Type Fields

Field Name	Action
Category	Rename to Interests. Edit the picklist values as follows: ■ Aerobics ■ Alternative Investments ■ Backpacking ■ Ballet ■ Baseball ■ Basketball ■ Cabernet ■ Chardonnay ■ Charity Work ■ Church Board ■ Community Government ■ Domestic Travel ■ Equities ■ Film ■ Fine Art ■ Fixed Income ■ Food Bank Volunteer ■ Football ■ French Food ■ Gelato ■ Horseback Riding ■ Horse Racing ■ International Travel ■ Local Arts Board ■ Mexican Food

Table 6. Contact Interests Record Type Fields

Field Name	Action
Category (continued)	■ Model Airplanes ■ Modern Dance ■ Mutual Funds ■ NASCAR ■ Numismatics ■ Opera ■ Philately ■ Pinot Noir ■ Port ■ Private Equity ■ Real Estate ■ Running ■ Soccer ■ Structured Products ■ Symphony ■ Tennis ■ Theatre ■ Weight Lifting

Claim Record Type

The claim record types allow insurance professionals to view the claims created by contacts, households, and business accounts. Insurers can also use the claim record type to quickly record critical information regarding the first notice of loss and accurately route the claim to the appropriate personnel.

Table 7 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 7. Claim Record Type Fields

Field Name	Action
Ability to Work	Add picklist values: ■ No ■ Partial ■ Yes
At Fault	Add picklist values: ■ Insured Driver ■ NA ■ Other Driver ■ Unknown
Category of Loss	Add picklist values: ■ Dwelling ■ Other Structures ■ Personal Property
Class of Employee	Add picklist values: ■ Clerical ■ Management ■ Supervisor
Kind of Loss	Add picklist values: ■ Fire ■ Injury ■ Theft
Liability Source	Add picklist values: ■ Injured Employee ■ Property of Employee Damaged ■ Property of Private Person

Table 7. Claim Record Type Fields

Field Name	Action
Line of Business	Add picklist values: ■ Auto ■ General Liability ■ Life ■ Property
Location of Loss	Add picklist values: ■ Adverse Claimants Home Address ■ Business Address ■ Other Location
Loss Code	Add picklist values: ■ 100 ■ 101 ■ 102
Loss Type	Add picklist values: ■ Collision ■ Injury
Medical Injury Code	Add picklist values: ■ IDC-9 ■ IDC-10
Part of Body Injured	Add picklist values: ■ Head Injury ■ Left Shoulder ■ Right Shoulder
Place of Injury	Add picklist values: ■ Factory ■ Office ■ Warehouse

Table 7. Claim Record Type Fields

Field Name	Action
Relationship to Insured	Add picklist values: ■ Colleague ■ Employer ■ Supervisor
Reported By	Add picklist values: ■ Agent ■ Driver of Insured Vehicle ■ Named Insured
State	Add picklist values: ■ AZ ■ CA ■ CO
Status	Add picklist values: ■ Loss Report ■ Open ■ Reviewed
Type of Injury	Add picklist values: ■ Burn ■ Fracture ■ Sprain

Coverage Record Type

The coverage record type allows you to track what is covered under policies and what coverage is used in claims. It includes information such as type of coverage, individual limit, total limit, and deductible.

Table 8 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 8. Coverage Record Type

Field Name	Action
Coverage	Add picklist values: ■ Collision ■ Comprehensive ■ Bodily Injury ■ Medical Payment
Coverage Status	Add picklist values: ■ Active ■ Closed ■ Inactive ■ Pending

Financial Account Record Type

The Financial Account record type enables financial institutions to move from Financial Account centric relationships to Contact, Household and Business centric relationships. With the new ability to create, update, and track any type of Financial Accounts and to model all financial account structures, hierarchies and portfolios, Oracle CRM On Demand Financial Services Edition enables relationship centricity across Activities, Opportunities, Service Requests, and Calendar.

Table 9 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 9. Financial Account Record Type Fields

Field Name	Action
Type	Add picklist values: ■ Checking ■ Commercial ■ Investment ■ Mortgage ■ Savings ■ Trust

Financial Account Holder Record Type

The Financial Account Holder record type allows financial institutions to create, manage, and leverage the complex relationships between financial accounts, contacts, households, and businesses. Within Financial Account Holders, you can model any and all relationships with specific roles, status, type, and dates. With household management and the new financial account holder solution, bankers and financial advisors can track all of their relationships in a contact, household, and business centric view.

Table 10 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 10. Financial Account Holder Record Type Fields

Field Name	Action
Role	Add picklist values: ■ External Advisor ■ Executive Assistance ■ Full Access ■ Guardian ■ Influencer ■ Legal ■ Owner

Financial Plan Record Type

All Financial Plans must be assembled, managed and communicated throughout the plan's lifecycle. A very important part of that life is the interactions with the contacts, households, and businesses that are part of the financial plan. The financial plan record types allow relationship integration of the relationship so that financial advisors have access to financial plans for financial accounts, contacts, households, and businesses.

Table 11 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 11. Financial Plan Record Type Fields

Field Name	Action
Status	Add picklist values: ■ Active - Signed ■ Approved by Manager ■ Draft in Process ■ Presented to Client
Type	Add picklist values: ■ Education ■ Family ■ Household ■ Portfolio ■ Retirements ■ Savings ■ Trust ■ Wealth Creation ■ Wealth Protection

Financial Products Record Type

The financial product record type allows bankers and financial advisors to know what financial products a contact, household, or a business is interested in, holds, or is transacting. Oracle CRM On Demand Financial Services Edition allows financial services customers to track all financial product details and structures to understand the relationships related to the financial products.

Table 12 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

NOTE: It is recommended that you use the following Financial Product structure and hierarchy in descending order: Type, Category, Class, Sub-class, Financial Product A and then Child Financial Products A.1, A.2 and so on.

Table 12. Financial Products Record Type Fields

Field Name	Action
Category	Add picklist values: ■ Industry ■ Segment ■ Region **NOTE:** This field is used in a cascading picklist as the Child to the Type field. Add the values in a single list. When you later set up the cascading picklist, you will specify the relationship between the values in the Issue field and the values in the Type field.
Class	Add picklist values: ■ Government ■ Technology ■ North America ■ EMEA ■ APAC **NOTE:** This field is used in a cascading picklist as the Child to the Category field. Add the values in a single list. When you later set up the cascading picklist, you will specify the relationship between the values in the Issue field and the values in the Category field.

Financial Transaction Record Type

The financial transaction record type allows bankers and financial advisors to view and track summary information about transactions.

Table 13 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 13. Financial Transaction Record Type Fields

Field Name	Action
Transaction Type	Add picklist values: ■ Big Ticket ■ Buy ■ Failed ■ Out of Compliance ■ Pending ■ Redemption ■ Sell

Household Record Type

Table 14 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

NOTE: Displaying the Total Net Worth and Last Activity fields impacts performance since these fields are contingent on the number of contacts. If required, these fields can be removed.

Table 14. Household Record Type Fields

Field Name	Action
Annual Revenue	Create a new currency type field.
Assets Under Management	Create a new currency type field.
Investable Assets	Create a new currency type field.

Table 14. Household Record Type Fields

Field Name	Action
Goal - Priority 1	Create a new picklist field, with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation
Goal - Priority 2	Create a new picklist field, with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation

Table 14. Household Record Type Fields

Field Name	Action
Goal - Priority 3	Create a new picklist field, with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation
Goal - Priority 4	Create a new picklist field, with the following values: ■ Asset Preservation ■ New Home ■ Predictable Income ■ Retirement ■ Risk Management ■ Saving for College ■ Tax Sheltering ■ Vacation Home ■ Wealth Accumulation
Potential Revenue	Create a new currency type field.
Risk Tolerance	Create a new picklist field, with the following values: ■ Conservative ■ Moderate ■ Aggressive
Tax Bracket	Create a new currency type field.
Total Life Insurance	Create a new currency type field.
Contact	Rename to Address.
Primary Group	Rename to Advisor Team.

Table 14. Household Record Type Fields

Field Name	Action
Total Net Worth	Rename to Net Worth.
Type	Rename to Household Type.

Insurance Property Record Type

The insurance property record type allows insurance professionals to track what properties are covered under certain Policies and also manage property information for all types of properties such as make, model, construction year, and license number.

Table 15 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 15. Insurance Property Record Type Fields

Field Name	Action
Type	Add picklist values: ■ Motorcycle ■ Motor Home ■ Private Passenger

Involved Party Record Type

The involved party record type allows insurance professionals to track the relationship between contacts and claims and capture the role of the contacts in the claim such as the claimant, the insured driver, or the lawyer.

Table 16 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 16. Involved Party Record Type Fields

Field Name	Action
Location	Add picklist values: ■ In Involved Vehicle ■ In Uninvolved Vehicle ■ Pedestrian
Role	Add picklist values: ■ Adverse Claimant ■ Claimant ■ Witness
Role in accident	Add picklist values: ■ Driver ■ Passenger ■ Pedestrian

Lead Record Type

Table 17 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 17. Lead Record Type Fields

Field Name	Action
Investable Assets	Create a new currency type field.
Needs	Create a new, multiselect picklist field, with the following values: ■ Financial Planning ■ Retirement Planning ■ Education Planning ■ Life Insurance ■ Investment Management ■ Risk Management ■ Estate Planning
Billing	Rename to Address.

Table 17. Lead Record Type Fields

Field Name	Action
Sales Person	Rename to Financial Advisor.
Source	Add the following value to the picklist: ■ Referral ■ Client

Opportunity Record Type

Table 18 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 18. Opportunity Record Type Fields

Field Name	Action
Potential Commission	Create a new currency field.
Account	Edit the field as follows: ■ Rename to Business Account. ■ Deselect the Required check box in the Additional Information section of the Opportunity Field Edit page. **NOTE:** You must also deselect the Required check box for the Account field on the opportunity page layout for each role in the Financial Services edition. For more information on setting up page layouts, see "Setting Up Page Layouts for Oracle CRM On Demand Financial Services Edition" on page 53.
Close Date	Deselect the Required check box.
Opportunity Type	Edit the picklist values as follows: ■ Product ■ Service **NOTE:** This field is used in a cascading picklist with the Product or Service field.

Table 18. Opportunity Record Type Fields

Field Name	Action
Reason Won/Lost	Edit the picklist values as follows: ■ Control Issues ■ Hired Personal Referral ■ Fees too High ■ Lack of Experience ■ Did Not Perceive Value ■ Do-It-Yourselfer ■ Lost to Competition ■ Lost to No Decision ■ Other ■ Relationship ■ Track Record ■ Referral ■ Existing Relationship
Revenue	Rename to Potential Revenue.

Policy Record Type

The Policy record type allows you to track and view all types of insurance policies that are integrated to your policy systems. The policy record type enables insurance professionals to view policy portfolios held by contacts, households, and business accounts.

Table 19 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 19. Policy Record Type Fields

Field Name	Action
Policy # Policy #	■ Rename to Policy Number.
Billing Status	Add picklist values: ■ Billed ■ Lapse ■ Paid

Table 19. Policy Record Type Fields

Field Name	Action
Policy Pay Method	Add picklist values: ■ Cash ■ Charged ■ Check
Policy Type	Add picklist values: ■ Auto ■ General Liability ■ Property
Rate Plan	Add picklist values: ■ 01 ■ 02
Rate State	Add picklist values: ■ AZ ■ CA ■ CO
Referral Source	Add picklist values: ■ Internet ■ Direct Mail ■ Magazine Ad
Status	Add picklist values: ■ In Force ■ New Business ■ Pending
Sub-Status	Add picklist values: ■ Broker Review ■ Cancelled ■ Not Submitted

Policy Holder Record Type

The policy holders record type allows insurance professionals to manage all roles, relationship types, and the history of a policy holder including the insured, driver, and beneficiary, across the client, household, and business relationships.

Table 20 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 20. Policy Holder Record Type Fields

Field Name	Action
Role	Add picklist values: ■ Beneficiary ■ Driver ■ Executive Assistance ■ External Advisor ■ Full Access ■ Guardian ■ Influencer ■ Insured ■ Legal ■ Owner

Service Request Record Type

Table 21 shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

Table 21. Service Request Record Type Fields

Field Name	Action
Area	Create a new picklist field with the following values: ■ Claim ■ Distributions ■ Financial Account Services ■ Financial Products ■ Financial Plan ■ Forms ■ Holdings ■ Households ■ Online Access ■ Policy ■ Profile ■ Transactions ■ Other **NOTE:** This field is used in a cascading picklist with the Type field (renamed Issue).
Preferred Contact Method	Create a new picklist field with the following values: ■ Home Phone ■ Work Phone ■ Cell Phone ■ Email
Account	Rename to Business Account.

Table 21. Service Request Record Type Fields

Field Name	Action

Type	Rename to Issue. Edit the picklist values as follows:
	■ Financial Account options:
	  ■ Checking
	  ■ Commercial
	  ■ Investment
	  ■ Mortgage
	  ■ Savings
	  ■ Trust

Type	■ Household option: ■ Household Type

Type	■ Financial Account Holdings options:
	  ■ External Advisor
	  ■ Executive Assistance
	  ■ Full Access
	  ■ Guardian
	  ■ Influencer
	  ■ Legal
	  ■ Owner

Type	■ Financial Product options:
	  ■ Bond
	  ■ Equity
	  ■ Mutual Fund
	  ■ Debt

Table 21. Service Request Record Type Fields

Field Name	Action
Type	■ Financial Plan options: ■ Education ■ Family ■ Household ■ Portfolio ■ Retirements ■ Savings ■ Trust ■ Wealth Creation ■ Wealth Protection
Type	■ Financial Transaction options: ■ Big Ticket ■ Buy ■ Failed ■ Out of Compliance ■ Pending ■ Redemption ■ Sell
Type	■ Policy options: ■ Auto ■ General Liability ■ Property

Table 21. Service Request Record Type Fields

Field Name	Action
Type	■ Claim options: ■ Auto ■ General Liability ■ Life ■ Property
Type	■ Forms options: ■ IRA Distribution ■ IRA Beneficiary Designation Accounts options: ■ Name Change ■ Address Change ■ Phone Number Change ■ Enable Margin ■ Enable Options Trading Profile options: ■ Risk Profile Change ■ Financial Situation Change ■ Marital Status Change ■ Objectives Change ■ Online Access options: ■ Forgot Username/Password ■ Enable Online Trading ■ Distribution options: ■ IRA Distribution ■ Send Check ■ Other options: ■ Other **NOTE:** This field is used in a cascading picklist with the Area field. Add the values in a single list. When you later set up the cascading picklist, you will specify the relationship between the values in the Issue field and the values in the Area field.

Configuring Cascading Picklists for Oracle CRM On Demand Financial Services Edition

To set up the cascading picklist fields, perform the steps in the following procedure.

This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

For more information about example configuration picklists, see "Example Configuration Picklists" on page 47.

To configure a cascading picklist for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Application Customization view.
2. In the Record Type Setup section, click the link for the required record type, for example, Contact.
3. In the Cascading Picklists section, click the required Cascading Picklists link, for example, Contact Interests Cascading Picklists.
4. In the Cascading Picklists page, do one of the following:
   - Click Edit or Copy to modify an existing cascading picklist definition.
   - Click New to create a new cascading picklist definition.

   The Cascading Picklists Wizard opens.
5. Select the parent picklist field and the related picklist field.

   NOTE: In a cascading picklist, the value that the user selects in the parent field determines which value the user can see in the list in the related field.
6. In the wizard, go to step 2 (Select Values), and specify the values that are to be displayed in the list on the related field when the user selects a value in the parent field.
7. Click a value in the parent field, and use the directional arrows to move the corresponding values for the related field from the Related Picklists Available Values list to the Related Picklist Displayed Values list.
8. In the wizard, go to Step 3, review your field configuration, and then click Finish to complete the setup.

Example Configuration Picklists

You can use the following tables as example configurations for cascading picklists:

- Contact Interest
- Service Request

- Financial Products
- Activity Type

Contact Interests

Table 22 shows an example configuration for cascading picklists for Contact Interests in Oracle CRM On Demand.

Table 22. Contact Interests Cascading Picklists

Parent Picklist Value	Related Picklist Value
Interest	**Category**
Culture	■ Ballet ■ Film ■ Fine Art ■ Modern Dance ■ Opera ■ Symphony ■ Theatre
Food and Wine	■ Cabernet ■ Chardonnay ■ French Food ■ Gelato ■ Mexican Food ■ Pinot Noir ■ Port
Hobby	■ Backpacking ■ Horseback Riding ■ Model Airplanes ■ Numismatics ■ Philately

Table 22. Contact Interests Cascading Picklists

Parent Picklist Value	Related Picklist Value
Investments	■ Alternative Investments ■ Equities ■ Fixed Income ■ Mutual Funds ■ Private Equity ■ Real Estate ■ Structured Products
Physical Fitness	■ Aerobics ■ Backpacking ■ Horseback Riding ■ Running ■ Tennis ■ Weight Lifting
Professional Sports	■ Baseball ■ Basketball ■ Football ■ Horse Racing ■ NASCAR ■ Soccer
Public Service	■ Charity Work ■ Church Board ■ Community Government ■ Food Bank Volunteer ■ Local Arts Board
Travel	■ Backpacking ■ Domestic Travel ■ International Travel
Other	Other

Service Requests

Table 23 shows an example configuration for cascading picklists for Service Requests in Oracle CRM On Demand.

Table 23. Service Requests Cascading Picklists

Parent Picklist Value	Related Picklist Value
Area	**Type**
Forms	■ IRA Distribution ■ IRA Beneficiary Designation
Financial Account Services	■ Name Change ■ Address Change ■ Phone Number Change ■ Enable Margin ■ Enable Options Trading
Profile	■ Risk Profile Change ■ Financial Situation Change ■ Marital Status Change ■ Objectives Change
Online Access	■ Forgot Username/Password ■ Enable Online Trading
Distributions	■ IRA Distribution ■ Send Check
Other	Other

Financial Products

Table 24 shows an example configuration for cascading picklists for Financial Products in Oracle CRM On Demand.

Table 24. Financial Products Cascading Picklists

Parent Picklist Value	Related Picklist Value
Area	**Type**
Industry	■ Government ■ Technology ■ North America ■ EMEA ■ APAC
Technology	■ Hardware ■ Software
Referral Call	■ Bond ■ Equity ■ Mutual Fund ■ Debt

Activity Type

Table 25 shows an example configuration for cascading picklists for Activity Type and its corresponding Call Result in Oracle CRM On Demand.

Table 25. Activity Type Cascading Picklists

Parent Picklist Value	Related Picklist Value
Area	**Type**
Birthday Call	■ No Reach ■ Appointment ■ Stay in Touch ■ Dead File

Table 25. Activity Type Cascading Picklists

Parent Picklist Value	Related Picklist Value
Review Call	■ No Reach ■ Appointment ■ Stay in Touch ■ Dead File
Referral Call	■ No Reach ■ Appointment ■ Stay in Touch ■ Dead File

Setting Up Page Layouts for Oracle CRM On Demand Financial Services Edition

It is recommended that you set up page layouts for each role that you intend to create in Oracle CRM On Demand Financial Services Edition.

When setting up a page layout, you can create a new layout, or you can copy or edit an existing layout. You can add fields to the page layout as well as to the sections within the page, and you can also expose the related information in the page layout.

In Oracle CRM On Demand Financial Services Edition, there are 14 record types that have preconfigured fields for common industry use. The following record types have many of the page layouts created for you:

- Broker Profile
- Claim
- Coverage
- Damage
- Financial Account
- Financial Account Holder
- Financial Account Holdings
- Financial Plan
- Financial Product
- Financial Transaction
- Insurance Property
- Involved Party
- Policy
- Policy Holder

Company administrators typically set up the page layouts for the following record types for each role in Oracle CRM On Demand Financial Services Edition:

- Activity
- Appointment
- Campaign
- Contact
- Household
- Lead
- Opportunity
- Service Request

The tables in this procedure show the details of the page layouts and related information sections that company administrators typically set up for Oracle CRM On Demand Financial Services Edition.

This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

To set up a page layout for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Application Customization view.
2. In the Record Type Setup section, click the link for the required record type, for example, Contact.
3. In the Page Layout Management section, click the link for the required page layout type, for example, Contact Page Layout.
4. If you want to create a copy of an existing layout, or to create a new layout, perform the following steps:
   a. On the *record type* Page Layout page, click the Copy link next to a layout to create a new layout that is based on an existing layout, or click New Layout on the title bar to create an entirely new layout.

      The Page Layout wizard opens.
   b. In Step 1 of the wizard, enter a name for the layout and (optionally) a description.
   c. Click Finish to save the layout.

   NOTE: You will return later to the Page Layout wizard to finish setting up the page layout.

5 On the *record type* Page Layout page, click the Edit Sections link for the layout that you want to configure.

The Section Names Setup page opens.

6 Enter the labels for any new sections that you want to set up on the page layout.

The following table shows the sections that company administrators typically set up for page layouts for each role in Oracle CRM On Demand Financial Services Edition.

Page Layout	Existing Section Name	Rename To
Contact	Contact Detail Information	Personal Profile
	Additional Information	Financial Profile
	Available Section	Investment Profile
	Available Section	Additional Information
Household	Available Section	Household Financial Profile
	Available Section	Household Investment Profile
	Available Section	Additional Information
Appointment	Available Section	Appointment Result

7 Click Save.

8 On the *record type* Page Layout page, click the Edit link next to the layout that you want to configure.

The Page Layout wizard opens.

9 In the wizard, go to Step 2 (Field Setup), and specify the field setup for the page layout. For each available field, select either the Required or Read-Only check box, as necessary to support your business processes.

NOTE: You must deselect the Required check box for the Business Account field (that is, the renamed Account field) and the Close Date field on the opportunity page layout for each role in Oracle CRM On Demand Financial Services Edition.

See the table in Step 10 of this procedure for details about the fields in the suggested page layouts and sections for Oracle CRM On Demand Financial Services Edition.

10 In the wizard, go to Step 3 (Field Layout), and configure the field layout for the page.

The following table shows the page layouts that are typically configured for each role in the Financial Service edition. Use the directional arrows to add fields to the various page sections, and remove any fields that are not needed, by moving them from the page sections to the Available Fields list.

Record Type	Field on Left Side of Page	Field on Right Side of Page
Appointment	**Key Appointment Information**	**Key Appointment Information**
	Subject	Start Time
	Type	End Time
	Location	Private
	Related Items	**Related Items**
	Primary Contact	Campaign
	Opportunity	Account
	Appointment Result	**Appointment Result**
	Appointment Rescheduled	New Opportunity
	New Fact Finder	Closing Interview
	Number of Referral	Not applicable
	Additional Information	**Additional Information**
	Created By	Delegated By

Record Type	Field on Left Side of Page	Field on Right Side of Page
Activity	**Key Call Information**	**Key Call Information**
	Subject	Lead Name
	Type	Contact Name
	Status	Priority
	Call Result	Due Date
	Description	Not applicable
	Related Items	**Related Items**
	Primary Contact	Campaign
	Opportunity	Account
	Additional Information	**Additional Information**
	Created By	Delegated By
Campaign	**Key Campaign Information**	**Key Campaign Information**
	Campaign Name	Start Date
	Campaign Type	End Date
	Objective	Campaign Currency
	Source Code	End Day
	Audience	Not applicable
	Offer	Not applicable
	Campaign Plan Information	**Campaign Plan Information**
	Revenue Target	Actual Cost
	# Targeted	Not applicable
	Additional Information	**Additional Information**
	Owner	Modified By
	Created By	General Notes

Record Type	Field on Left Side of Page	Field on Right Side of Page
Contact	**Key Contact Information**	**Key Contact Information**
	Mr./Mrs.	Work Phone #
	First Name	Cellular Phone #
	Middle Name	Home Phone #
	Last Name	Email
	Business Account	Employer
	Contact Type	Self-Employed
	Book Segment	Job Title
	Contact ID	Profession
	Status	Qualified Date
	Date	Not applicable
	Personal Profile	**Personal Profile**
	Goals	Last Call Date
	Client Since Date	Call Frequency
	Demographic	Next Call Date
	Date of Birth	Best Times to Call
	Age	Referred By
	Gender	Source
	Marital Status	Last Activity Date

Record Type	Field on Left Side of Page	Field on Right Side of Page
	Financial Profile	**Financial Profile**
	Assets Under Management	Total Assets
	Investable Assets	Total Liabilities
	Total Income	Net Worth
	Total Expenses	Total Life Insurance
	Annual Revenue	Credit Score
	Potential Revenue	Tax Bracket
	Not applicable	Contact Currency
	Investment Profile	**Investment Profile**
	Risk Tolerance	Goal-Priority 1
	Investing Experience	Goal-Priority 2
	Investment Horizon	Goal-Priority 3
	Investment Mix	Goal-Priority 4
	Additional Information	**Additional Information**
	Advisor Team	Modified By
	General Notes	Not applicable
	Owner	Created

Record Type	Field on Left Side of Page	Field on Right Side of Page
Household	**Key Household Information**	**Key Household Information**
	Household Name	Primary Contact
	Household Type	Primary Contact Phone
	Segment	Risk Tolerance
	Assets Under Management	Investment Horizon
	Net Worth	Not applicable
	Household Financial Profile	**Household Financial Profile**
	Assets Under Management	Total Assets
	Investable Assets	Total Liabilities
	Total Income	Net Worth
	Total Expenses	Total Life Insurance
	Annual Revenue	Tax Bracket
	Potential Revenue	Household Currency
	Household Investment Profile	**Household Investment Profile**
	Goal-Priority 1	Goal-Priority 3
	Goal-Priority 2	Goal-Priority 4
	Additional Information	**Additional Information**
	Advisor Team	Modified By
	Owner	Last Activity Date
	General Notes	Not applicable

Record Type	Field on Left Side of Page	Field on Right Side of Page
Lead	**Key Lead Information**	**Key Lead Information**
	Mr./Ms.	Job Title
	First Name	Profession
	Last Name	Work Phone #
	Address	Cellular Phone #
	Email	Home Phone #
	Referred By	Approximate Income
	Profession	Age
	Date of Birth	Not applicable
	Opportunity Related Information	**Opportunity Related Information**
	Status	Source
	Rating	Campaign
	Needs	Investable Assets
	Estimated Close Date	Potential Revenue
	Additional Information	**Additional Information**
	Financial Advisor	Reassign Owner
	Created	Owner
	Modified	Not applicable
	General Notes	Not applicable
Opportunity	**Key Opportunity Information**	**Key Opportunity Information**
	Opportunity Name	Potential Revenue
	Primary Contact Last Name	Potential Commission
	Business Account	Close Date
	Sales Stage	Not applicable
	Opportunity Type	Not applicable
	Product or Service	Not applicable
	Sales Detail Information	**Sales Detail Information**

Record Type	Field on Left Side of Page	Field on Right Side of Page
	Status	Probability
	Priority	Reason Won/Lost
	Additional Information	**Additional Information**
	Owner	Modified By
	General Notes	Not applicable
Service Request	**Contact Information**	**Contact Information**
	SR Number	Work Phone #
	Contact	Cell Phone #
	Business Account	Home Phone #
	Preferred Contact Method	Email
	Service Detail Information	**Service Detail Information**
	Area	Priority
	Issue	Status
	Source	Opened Time
	Modified By	Closed Time
	Created By	Owner
	SR Currency	Reassign Owner
	Additional Information	**Additional Information**
	Subject	Not applicable
	Description	Not applicable

11 In the wizard, go to Step 4 (Related Information), and move the Related Information items to the Displayed Information or Available Information sections, as required.

The following table lists the related information sections that company administrators typically expose (that is, move to the Displayed Information section) in the page layouts for each role in Oracle CRM On Demand Financial Services Edition.

Page Layout	Related Information
Campaign	Open Activities
	Completed Activities
	Leads
	Financial Accounts
	Financial Plans
	Policies
	Notes
	Attachments
	Recipients
Contacts	Households
	Contact Interests
	Contact Relationships
	Financial Account Holders
	Policy Holders
	Contact Team
	Opportunities
	Referrals
	Notes
	Service Requests
	Campaigns
	Attachments
	Open Activities
	Completed Activities
	Addresses
	Claims
	Policies

Page Layout	Related Information
Household	Contacts
	Opportunities
	Notes
	Leads
	Service Requests
	Household Team
	Attachments
	Open Activities
	Completed Activities
	Portfolios
Lead	Lead Qualification Scripts
	Open Activities
	Completed Activities
	Attachments
Opportunity	Contacts
	Product Revenues
	Notes
	Open Activities
	Completed Activities
	Opportunity Partners
	Opportunity Competitors
	Leads
	Attachments
Policy	Attachments
	Books
	Custom Objects
	Open Activities
	Completed Activities
	Policy Holders
	Coverages
	Insurance Properties
	Claims

Page Layout	Related Information
Claims	Involved Parties
	Damages
	Open Activities
	Completed Activities
Portfolios	Portfolios
	Contacts
	Open Activities
	Completed Activities
	Portfolio Team
Service Request	Open Activities
	Completed Activities
	Notes
	Audit Trail
	Attachments
Activity	Outlook Calendar. For an example, see Adding an Outlook Web Applet to a Task Detail Page as Related Information on page 66.
Partner	Partner Relationship
	Addresses
	Application
	Lead
	MDF Request
	Broker Profile
	Notes
	Books
	Partner Organization Books
	Business Plans
	Campaigns

12 Click Finish.

Adding an Outlook Web Applet to a Task Detail Page as Related Information

You can embed external Web content, such as Microsoft Outlook, by creating a custom Web applet that appears as a related information section in your task detail page.

To perform this procedure, your role must include the Customize Application and Manage Custom Web Applets privileges.

To add a Microsoft Outlook Web applet to a task detail page as related information

1. In the upper-right corner of any page, click the Admin global link.
2. Click Application Customization.
3. Click Activity.
4. In the Application Setup section, click Global Web Applets, then click New.
5. In the Custom Web Applet page, complete the following fields, and click Save.

Field	Comments
Name	Enter Outlook Calendar.
Location	Select Detail Page.
Type	Select HTML.
Web Applet HTML	Add the following code: `<script src="http://www.gmodules.com/ig/ifr?url=http://hosting.gmodules.com/ig/gadgets/file/118137453981720645697/MSOutlookWidget.xml&up_DefaultView=Inbox&synd=open&w=800&h=500&title=Microsoft+Outlook&border=http%3A%2F%2Fwww.gmodules.com%2Fig%2Fimages%2F&output=js"></script>` **NOTE:** To change the size of the Microsoft Outlook gadget, modify the numbers highlighted in the previous string. The first number (w=800) is the width and the second number (h=500) is the height, both in pixels.

Making the Web Applet Visible

Complete the following procedure to make the Microsoft Outlook Web applet visible.

To make the Web applet visible

1. In the upper-right corner of any page, click the Admin global link.
2. Click Application Customization, then click Activity.

3. In the Application Setup section, click My Homepage Layout.
4. In the Page Layout Management section, click Task Page Layout.
5. In the Task Page Layout list, click Edit to modify your existing layout.

   The Page Layout Wizard is displayed and guides you through the process.
6. In Step 4 Related Information:
   a. Move the new Outlook Calendar 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.

Displaying the Calendar

Complete the procedure to display the calendar.

To display the calendar

1. Open Microsoft Outlook and navigate to the calendar.
2. To display the weekly calendar, select the Weekly tab in Microsoft Outlook first before it displays in the Microsoft Outlook Calendar Web applet.

If you want to display the Calendar, open Outlook and navigate to the Calendar. If you want to display the weekly Calendar, select the weekly tab in your Outlook first before it displays in the Outlook Calendar web applet.

Modifying Search Layouts for Oracle CRM On Demand Financial Services Edition

Complete the steps in the following procedure to modify the search layout for the record types.

Company administrators typically modify the search layout for the Insurance Property record type for each role in the Financial Services edition.

This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

To modify a search layout for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Application Customization view.
2. In the Record Type Setup section, click the link for the Insurance Property record type.
3. In the Search Layout Management section, click the Insurance Property Search Layout.

4 In Insurance Property Search Layout page, click the Copy link next to a layout to create a new layout that is based on an existing layout, or click New Layout on the title bar to create an entirely new layout.

   The Page Layout wizard opens.

5 In Step 1 of the wizard, enter a name for the layout and (optionally) a description and click Next.

6 In Step 2 Specify Targeted Search Field, select fields from the available Fields list and use the up and down arrows next to the Selected Fields list to organize the search fields in the order you want, or you can leave the default field in this step.

7 In Step 3 Define Search Result Layout, select fields from the available Fields list and put the fields in the Lookup Window and Search Results Fields section. For example to help search the Insurance property, the administrator can select: Policy, Type, Make, Model, Amount fields to be put in the Lookup Window and Search Results Fields section.

8 Deselect the Configure Lookup window with default fields check box.

9 Click Finish to save the layout.

Enabling a Search Layout for Oracle CRM On Demand Financial Services Edition

Now you must enable the search layout you configured in the previous procedure for each role in Oracle CRM On Demand Financial Services Edition.

To enable a search layout for Oracle CRM On Demand Financial Services Edition

1 In Oracle CRM On Demand, navigate to Admin, User Management and Access Controls, and then the Role Management view.

2 Click the edit link next to the role that you want to enable in the Search Layout.

   The Role Management wizard opens.

3 Go to Step 7 of the wizard, Search Layout Assignment and on the Insurance Property record type, select the search layout name that you configured in the previous procedure.

4 Click Finish.

Setting Up Related Information Page Layouts for Oracle CRM On Demand Financial Services Edition

It is recommended that you set up related information page layouts for each role that you intend to create in Oracle CRM On Demand Financial Services Edition.

When setting up a related information page layouts, you can create a new layout, or you can copy or edit an existing layout. You can add fields to the related page layout as well as to the sections within the page, and you can also expose the related information in the page layout.

In Oracle CRM On Demand Financial Services Edition, there are 13 record types that have preconfigured fields for common industry use. These objects have many of the related information layouts created for you, but you can make additions as necessary.

Company administrators typically set up the related information layouts for the following record types for each role in the Financial Services edition:

- Contact
- Financial Account
- Financial Product
- Policy

The tables after this procedure show the details of the page layouts and related information sections that company administrators typically set up for Oracle CRM On Demand Financial Services Edition.

This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

To set up a related information page layout for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Application Customization view.
2. In the Record Type Setup section, click the link for the required record type.
3. In the Page Layout Management section, click the Related Information Page Layout.
4. In the Related Information Setup section, select the related information type 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.

   If you want to create a copy of an existing layout, or to create a new layout, perform the following steps:

5 On the record type Page Layout page, click the Copy link next to a layout to create a new layout that is based on an existing layout, or click New Layout on the title bar to create an entirely new layout.

The Page Layout wizard opens.

6 In Step 1 of the wizard, enter a name for the layout and (optionally) a description and click Next.

7 In Step 2 Field Setup, select fields from the available Fields list and use the up and down arrows next to the Selected Fields list to organize the fields in the order you want.

NOTE: For more information on field setup, see "Configuring Field Setup for Oracle CRM On Demand Financial Services Edition" on page 13.

8 Click Finish to save the layout.

Table 26 shows the sections that company administrators typically set up for related information page layouts for each role in Oracle CRM On Demand Financial Services Edition.

Table 26. Related Information Setup for Contacts

Related Information Setup	Field Setup
Financial Account Holders	Financial Account Holder Name
	Financial Account
	Role
	Financial Account Type
	Balance
	Joint
	Held Away
	Primary Account
	Open Date
Financial Transactions	Financial Product Name
	Transaction Type
	Quantity
	Value
	Transaction Price
	Transaction Date Time
	Transaction Period
	Transaction ID
	Transaction Source

Table 26. Related Information Setup for Contacts

Related Information Setup	Field Setup
Involved Party	Involved Party Name
	Claim Number
	Status
	Loss Code
	Loss Type
	Reported by
	Role
	Role in Accident
	Injury Summary

Table 27 shows the sections that company administrators typically set up for related information page layouts for each financial account in Oracle CRM On Demand Financial Services Edition.

Table 27. Related Information Setup for Financial Account

Related Information Setup	Field Setup
Financial Account Holders	Financial Account Holder Name
	Financial Account Holder: First Name
	Financial Account Holder:
	Role
	Financial Account Holder: Email
	Primary Account
	Joined Date

Table 28 shows the sections that company administrators typically set up for related information page layouts for each financial product in Oracle CRM On Demand Financial Services Edition.

Table 28. Related Information Setup for Financial Product

Related Information Setup	Field Setup
Financial Transactions	Financial Account Number
	Transaction Type
	Quantity
	Value
	Transaction Price
	Transaction Date Time
	Transaction Period
	Transaction ID
	Transaction Source

Table 29 shows the sections that company administrators typically set up for related information page layouts for each policy in Oracle CRM On Demand Financial Services Edition.

Table 29. Related Information Setup for Policy

Related Information Setup	Field Setup
Policy Holder	Policy Holder Name
	Contact Holder
	Contact Holder: First Name
	Contact Holder: Last Name
	Role
	Insured Type
	Effective Date
	Holder Percentage
	Contact Holder: Email

Table 29. Related Information Setup for Policy

Related Information Setup	Field Setup
Claim	Claim Number
	Status
	Loss Code
	Loss Type
	Report Number
	Reported by
	Report Date
Coverage	Coverage
	Individual Limit
	Total Limit
	Deductible
Policy Attachment	Attachment Name
	Size
	Type
	Created By
	Modified By
	Last Modified

Modifying Sales Stages for Oracle CRM On Demand Financial Services Edition

Complete the steps in the following procedure to modify the sales stages. This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

To modify the sales stages for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Data Rules & Assignment view.
2. In the Sales Methodology section, click the Sales Processes link.
3. On the Sales Process List page, click the Sales Process Name link.
4. In the Sales Stage title bar, click New, or in the row for an existing sales stage, click Edit.
5. On the Sales Stage Edit page, enter a name for the sales stage or edit the name for an existing one.

6 On the Sales Stage Edit page, enter a number in the Order field for the sales stage, or edit the Order # (number) for an existing one.

Order # (number) corresponds to the position of the sales stage in the picklist.

7 Click Save.

Repeat these steps for each sales stage that you want to add or edit.

Table 30 shows the suggested sales stages for Oracle CRM On Demand Financial Services Edition:

Table 30. Sales Stages for Oracle CRM On Demand Financial Services Edition

Sales Stage	Default Probability	Order
New Opportunity	10	1
Initial Communication	20	2
Discovery	30	3
Opportunity Analysis	40	4
Solution Development	50	5
Solution Presentation	60	6
Client/Prospect Evaluation	70	7
Commitment to Buy	80	8
Paperwork Signed	90	9
Closed/Won	100	10
Closed/Lost	0	11

Setting Up Access Profiles for Financial Services Roles

You must set up two profiles for each financial services role:

- **Default access profile.** Sets the access levels for records not owned by the user (or by the user's group).
- **Owner access profile.** Sets the access levels for the records owned by the user, by the user's group, or by someone who reports to the user (if manager visibility is enabled).

Complete the steps in the following procedure for each of the required access profiles. This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

To set up the default access and owner access profiles for a financial services role

1 In Oracle CRM On Demand, navigate to the Admin screen, User Management and Access Controls, and then the Access Profiles view.

2 Click the Copy link on the appropriate profile, as follows:

- If you are setting up a default access profile, click the Copy link on a default access profile that is similar to the one you want to set up.

  For example, to create the default access profile for a financial advisor, click the Copy link on the Field Sales Rep Default Access Profile.

- If you are setting up an owner access profile, click the Copy link on an owner access profile that is similar to the one you want to set up.

  For example, to create the owner access profile for a financial advisor, click the Copy link on the Field Sales Rep Owner Access Profile.

The Access Profile Wizard opens.

3 In Step 1 of the wizard, enter a name for the access profile (for example, Financial Advisor Default Access Profile or Financial Advisor Owner Access Profile).

4 In the wizard, go to Step 2 (Specify Access Levels), and change the access settings for the role, as necessary.

For example, the following table lists the access settings that company administrators typically configure for a financial advisor role.

Record Type	Related Information	Default Access	Owner Access
Claim	Claim	Read/Edit/Delete	Read/Edit/Delete
Claim	Activities	View	View
Claim	Damages	View	View
Claim	Involved Parties	View	View
Claim	Service Requests	View	View
Contact	Contact Interests	Full	Full
Contact	Contact Relationships	Read/Create	Full
Contact	Households	Full	Full
Contact	Portfolios	Full	Full
Contact	Referrals	View	View
Coverage	Coverage	Read/Edit/Delete	Read/Edit/Delete
Damage	Damage	Read/Edit/Delete	Read/Edit/Delete
Financial Account	Financial Account	Read/Edit/Delete	Read/Edit/Delete

Record Type	Related Information	Default Access	Owner Access
Financial Account	Activities	View	View
Financial Account	Books	Full	Full
Financial Account	Custom Objects (All)	Full	Full
Financial Account	Financial Account	View	View
Financial Account	Financial Account Holders	View	View
Financial Account	Financial Account Holdings	View	View
Financial Account	Financial Plans	View	View
Financial Account	Financial Transactions	View	View
Financial Account	Leads	View	View
Financial Account	Opportunities	View	View
Financial Account	Policies	View	View
Financial Account	Service Requests	View	View
Financial Account	Financial Account Holder	Read/Edit/ Delete	Read/Edit/Delete
Financial Account	Financial Account Holdings	Read/Edit/ Delete	Read/Edit/Delete
Financial Plan	Financial Plan	Read/Edit/ Delete	Read/Edit/Delete
Financial Plan	Activities	View	View
Financial Plan	Books	Full	Full
Financial Plan	Leads	View	View
Financial Plan	Opportunities	View	View
Financial Plan	Service Requests	View	View
Financial Product	Financial Product	Read/Edit/ Delete	Read/Edit/Delete
Financial Product	Coverages	View	View
Financial Product	Financial Account Holdings	View	View
Financial Product	Financial Products	View	View
Financial Product	Financial Transactions	View	View
Financial Product	Financial Transaction	Read/Edit/ Delete	Read/Edit/Delete

Record Type	Related Information	Default Access	Owner Access
Financial Transaction	Financial Transactions	View	View
Financial Transaction	Service Requests	View	View
Household	Household	Read/Edit/Delete	Read/Edit/Delete
Household	Attachments	Read-Only	Read-Only
Household	Completed Activities	Read-Only	Read-Only
Household	Contacts	Full	Full
Household	Household Team	Full	Full
Household	Leads	Read-Only	Read-Only
Household	Notes	Read-Only	Read-Only
Household	Open Activities	Read-Only	Read-Only
Household	Opportunities	Read-Only	Read-Only
Household	Portfolios	Read-Only	Read-Only
Household	Service Requests	Read-Only	Read-Only
Insurance Property	Insurance Property	Read/Edit/Delete	Read/Edit/Delete
Insurance Property	Coverages	View	View
Insurance Property	Damages	View	View
Policy	Policy	Read/Edit/Delete	Read/Edit/Delete
Policy	Activities	View	View
Policy	Policy Attachment	Read/Edit/Delete	Read/Edit/Delete
Policy	Books	Full	Full
Policy	Claims	View	View
Policy	Coverages	View	View
Policy	Custom Objects (All)	Full	Full
Policy	Insurance Properties	View	View
Policy	Leads	View	View
Policy	Opportunities	View	View
Policy	Policies	View	View
Policy	Policy Holders	View	View

Record Type	Related Information	Default Access	Owner Access
Policy	Service Requests	View	View
Policy	Policy Holder	Read/Edit/ Delete	Read/Edit/Delete
Portfolio	Portfolio	Read/Edit	Read/Edit/Delete
Portfolio	Completed Activities	View	View
Portfolio	Contacts	Full	Full
Portfolio	Open Activities	View	View
Portfolio	Portfolio Sub-Accounts	View	View
Portfolio	Team	Full	Full

5 Click Finish.

Creating Financial Services Roles

Complete the steps in the following procedure to create a financial services role. This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

To create a financial services role

1 In Oracle CRM On Demand, navigate to Admin, User Management and Access Controls, and then the Role Management view.

2 Click the Copy link on an existing role that is similar to the role you want to create.

For example, to create the Financial Advisor role, copy the Field Sales Rep role.

The Role Management wizard opens.

3 In Step 1 of the wizard, enter the role name (for example, Financial Advisor) and description.

4 In the wizard, go to Step 2 (Record Type Access), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services settings that company administrators typically configure for a financial advisor role.

Record Type	Has Access	Can Create	Can Read All Records
Contact	Selected	Selected	Not Selected
Household	Selected	Selected	Not Selected
Portfolio	Selected	Selected	Not Selected

Record Type	Has Access	Can Create	Can Read All Records
Claim	Selected	Selected	Not Selected
Coverage	Selected	Selected	Not Selected
Damage	Selected	Selected	Not Selected
Financial Account	Selected	Selected	Not Selected
Financial Account Holders	Selected	Selected	Not Selected
Financial Plan	Selected	Selected	Not Selected
Financial Product	Selected	Selected	Not Selected
Financial Transaction	Selected	Selected	Not Selected
Financial Holdings	Selected	Selected	Not Selected
Insurance Property	Selected	Selected	Not Selected
Involved Party	Selected	Selected	Not Selected
Policy	Selected	Selected	Not Selected
Policy Holder	Selected	Selected	Not Selected

5 In the wizard, go to Step 3 (Access Profiles), and select the access profiles that you created earlier for the role.

6 In the wizard, go to Step 4 (Privileges), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services privileges that company administrators typically configure for a financial advisor role.

Role	Category	Privilege	Assign
Financial Advisor	CRM	Manage Contact Interest Access	Not Selected
	CRM	Manage Extended Contact and Account Relationship Access	Not Selected
	CRM: Sales	Manage Referrals	Not Selected
	Industry-Specific: Financial Services	Manage Households Access	Not Selected
	Industry-Specific: Financial Services	Manage Portfolios Access	Not Selected
	Industry-Specific: Financial Services	Manage Banking Custom Objects	Selected
	Industry-Specific: Financial Services	Manage Insurance Custom Objects	Selected

7 In the wizard, go to Step 5 (Tab Access & Order), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services settings that company administrators typically configure for a financial advisor role.

Role	Tab	Move To
Financial Advisor	Households	Selected Tabs
	Portfolios	Selected Tabs
	Claim	Selected Tabs
	Coverage	Selected Tabs
	Damage	Selected Tabs
	Financial Account	Selected Tabs
	Financial Account Holders	Selected Tabs
	Financial Plan	Selected Tabs
	Financial Product	Selected Tabs
	Financial Transaction	Selected Tabs
	Financial Holdings	Selected Tabs
	Insurance Property	Selected Tabs
	Involved Party	Selected Tabs
	Policy	Selected Tabs
	Policy Holder	Selected Tabs

8 In the wizard, go to Step 6 (Page Layout Assignment), and assign a page layout to each record type.

9 In the wizard, go to Step 7 (Search Layout Assignment), and assign a search layout to each record type.

For information about setting up search layouts, see *Oracle CRM On Demand Online Help*.

10 In the wizard, go to Step 8 (Homepage Layout Assignment), and assign a homepage layout to each record type.

For information about setting up homepage layouts, see *Oracle CRM On Demand Online Help*.

11 Click Finish.

Configuring Custom Objects for Policies

This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

You can associate custom objects 1-40 with the Policy record. Custom objects 1-40 can be customized for data specific to insurance policies.

The relationship between the Policy record type and Custom Objects is one-to-many. You can create many-to-many relationships for custom object record types by using another custom object record type as an intersection table. For more information about custom objects and many-to-many relationships, see *Oracle CRM On Demand Online Help*.

To configure custom objects:

- Verify that the administrator's role is set up for the custom objects
- Add the Custom Objects to the Policy record type page layout

Complete the steps in the following procedure to verify the administrator's role is set up for custom objects.

Verifying the administrator's role is set up for custom objects

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 User Management and Access Controls link.
3. In the Access Profile Management section, click the Access Profiles link.
4. On the Access Profiles page, click the Edit link for the role that you would like to edit, and do the following:
   a. Navigate to Step 2 (Specify Access Levels) and click the Related Information next to the Policy object.
   b. On the Related Information page, find Custom Objects, and select View for the Access Level.
   c. Click Finish.

Complete the steps in the following procedure to add custom objects to the Policy record type page layout.

To add the custom objects to the Policy record type page 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 Record Types Setup section, click the link for the Policy record type.
4. In the Page Layout Management section, click the Related Information Layout link.
5. On the Related Information Layout page, click the Edit link next to a layout.

   The Related Information Layout wizard opens.

6 In the wizard, go to Step 4 (Related Information), and use the directional arrows to add Custom Objects option to the Available section.

7 Click Finish to save the record.

Configuring Books

This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

Books are an efficient method of organizing and segregating records, so that users can collaborate without being team members for each record.

You can configure books for the following records:

- Policy
- Financial Account
- Financial Plan

A book can be associated with a record in two ways:

- By adding the book to the Book related information list on a Policy record.
- Automatically, through a workflow rule or batch assignment.

For more information about book management, see *Oracle CRM On Demand Online Help*.

Complete the steps in the following procedure to verify the administrator's role is set up for books.

Verifying the administrators role is set up 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 of the Admin Homepage, click the User Management and Access Controls link.

3 In the Access Profile Management section, click the Access Profiles link.

4 On the Access Profiles page, click the Edit link for the Administrator Default Access Profile, and do the following:

   a Navigate to Step 2 (Specify Access Levels) and click the Related Information next to the record type object.

   b On the Related Information page, find Books, and select Full for the Access Level.

   c Click Finish.

5 On the Access Profiles page, click the Edit link for the Administrator Owner Access Profile, and do the following:

   a Navigate to Step 2 (Specify Access Levels) and click the Related Information next to the record type object.

   b On the Related Information page, find Books, and select Full for the Access Level.

c. Click Finish.

Complete the steps in the following procedure to add books to the record type page layout.

To add the book to page 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 Record Types Setup section, click the link for the record type.
4. In the Page Layout Management section, click the record type Page Layout link.
5. On the Policy Page Layout page, click the Edit link next to a layout.

   The Page Layout wizard opens.
6. In the wizard, go to Step 4 (Related Information), and use the directional arrows to add the Books option to the Available section.
7. Click Finish to save the record.

For more information about creating books, see *Oracle CRM On Demand Online Help*.

Configuring My Team Polices List

This task is a step in "Process of Configuring Oracle CRM On Demand Financial Services Edition" on page 12.

Insurance agent managers can configure the My Team Policies List in the Policy List page to show all the policies owned by their subordinates. For more information about creating lists, see *Oracle CRM On Demand Online Help*.

Complete the steps in the following procedure to add the My Team Policies list to the Policy List page.

To configure My Team Polices list

1. Navigate to the Policy Homepage.
2. In the Policy List page, click the Manage Lists link.
3. Manage Policy Lists page, Click on New List
4. In the Search In section, select the All records I or my subordinates own option, and then click Save.
5. In the List Name field, enter My Team Policies.
6. For List Accessibility, select one of the following options based on your user role:
   - 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.

7 Click Save and Run.

4 Configuring Workflows for the Producer Success Model

This chapter describes how to configure workflow rules to support the Producer Success Model in Oracle CRM On Demand Financial Services Edition. It includes the following topics.

About Configuring Workflows for 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 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.

To support the Producer Success Model, you configure a set of workflow rules and actions. The workflow rules that are specific to the Producer Success Model include:

- A workflow rule that creates a task to call the lead on the next working day every time a new Lead record is created. For more information about this workflow rule, see "Workflow Rule for Creating a Referral Call When a New Lead is Created" on page 87.
- Workflow rules that create a followup task to call a lead, based on the value in the Call Result field in the Task Detail page. For more information about these workflow rules, see "Workflow Rules for Creating Followup Calls Based on Call Results" on page 88.
- Workflow rules that create tasks to help producers to keep in regular contact with clients. For more information about these workflow rules, see "Workflow Rules for Scheduling Calls with Clients" on page 106.

For more information about Producer Success Model workflows, see 1272000.1 (Article ID) on My Oracle Support or from Oracle CRM On Demand — Training and Support Center.

Configuring Workflow Rules and Actions for the Producer Success Model

The following procedures describe the workflow rules and actions that you must create to support the Producer Success Model:

- "Workflow Rule for Creating a Referral Call When a New Lead is Created" on page 87
- "Workflow Rules for Creating Followup Calls Based on Call Results" on page 88
- "Workflow Rules for Scheduling Calls with Clients" on page 106

To create a workflow rule, complete the following procedure.

To create a workflow rule

1. In Oracle CRM On Demand, click Admin.
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 Name field, enter a unique name.
5. To make the workflow rule active, select the Active option.
6. In the Record Type menu, select the appropriate record type.
7. In the Trigger Event menu, select the appropriate trigger event.
8. (Optional) In the Workflow Rule Condition section of the Workflow Rule Detail page, click the *fx* icon and add an expression.
9. Save the rule.

Creating a Workflow Action

To create a workflow action, complete the following procedure.

To create a workflow action

1. In the Workflow Rule Detail page, in the Actions title bar, click Menu and select Create Task.
2. In the Workflow Action Edit page, enter a name for the action.
3. If you want to enable the action, select the Active check box.
4. In the Owner menu, select Relative User on Record, and then select the appropriate task owner.
5. In the Type menu, select the appropriate task type.
6. In the Due Date menu, enter the expression that evaluates to the appropriate 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.

7 In the Subject field, enter the subject.

8 Save the action.

Repeat these procedures until you have configured all of the necessary workflow rules and actions.

For more information about configuring workflow rules and actions, see *Oracle CRM On Demand Online Hel*p.

Workflow Rule for Creating a Referral Call When a New Lead is Created

This topic provides details of the workflow rule and action that you must configure so that a task is automatically created when a lead record a saved for the first time. A referral call is created. It is scheduled on the next working day after the lead is created. For example, if the lead is created on a Friday or Saturday, the call is scheduled for the following Monday. The owner of the task is the owner of the lead record.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is a Lead record.

Trigger Event

The trigger event is When New Record Saved.

Rule Condition

Not applicable. Leave this section blank.

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Referral Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0
* JulianDay(Today()+1)/7, 8, 1), "0")="7"),Today()+3,Today()+2),Today()+1)
```

Subject

The subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Referral Call")%%%-
%%%JoinFieldValue('<Lead>',[<LeadId>],'<LeadFullName>')%%%
```

Workflow Rules for Creating Followup Calls Based on Call Results

This topic provides details of the workflow rules and actions that you must configure so that a followup task is created 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**. Referral calls are calls that producers must make to follow up on leads.
- **Birthday calls**. Birthday calls are calls that producers make to existing leads or clients on their birthday.
- **Review calls**. Review calls are calls that producers make to leads or clients when it has been six months since the last call with the lead.

The 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 producer selects this value if the lead is unreachable.
- **Stay In Touch**. The producer selects this value if the lead or contact does not want to talk today but the lead wants the producer to stay in touch.

- **Dead File**. The producer selects this value if the lead does not want to talk today and does not want to be contacted again
- **Appointment**. The producer selects this value if the lead or client is ready for an appointment.

The workflow rules in this topic create a followup task for calls that result in the No Reach value or the Stay in Touch value. The type of the followup task depends on the type of the original task.

- **Call result value is No Reach.** If the Call Result value is No Reach, the workflow rule schedules a followup task for the next working day for the lead or client record owner.
- **Call result value is Stay in Touch.** If the Call Result value is Stay in Touch, the workflow rule schedules a followup task to call the lead six months from now or one week prior to the lead's or client's birthday, whichever occurs first.

Followup Calls for Referral Calls Where the Result Is No Reach

This workflow rule is triggered when a producer calls a lead through a referral call and then updates the Call Result field in the Task edit page to No Reach. The workflow rule creates a referral call followup task for the following workday.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Referral Call") AND
[<CallResult>]=LookupValue("OD_CALL_RESULT", "No Reach") AND PRE('<CallResult>') IS
NULL
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Referral Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0
* JulianDay(Today()+1 )/7, 8, 1), "0")="7"),Today()+3,Today()+2),Today()+1)
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Referral Call")%%%-
%%%JoinFieldValue('<Lead>',[<LeadId>],'<LeadFullName>')%%%
```

Followup Calls for Review Calls Where the Result Is No Reach

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to No Reach. The workflow rule creates a review call followup task for the following workday.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity Record.

Trigger Event

The trigger event is When Modified Record Saved

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Review Call") AND
[<CallResult>]=LookupValue("OD_CALL_RESULT", "No Reach") AND PRE('<CallResult>') IS
NULL
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0
* JulianDay(Today()+1 )/7, 8, 1), "0")="7"),Today()+3,Today()+2),Today()+1)
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-%%%IIf([<PrimaryContactId>] <> "No Match Row Id",JoinFieldValue('<Contact>',[<PrimaryContactId>],'<ContactFullName>'),JoinFieldValue('<Lead>',[<LeadId>],'<LeadFullName>'))%%%
```

Followup Calls for Birthday Calls Where the Result Is No Reach

This workflow rule is triggered when a producer calls a lead or client through a birthday call and then updates the Call Result field in the Task edit page to No Reach. The workflow rule creates a review call followup task for the following workday.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity record.

Trigger Event

The trigger event is when Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Birthday Call") AND [<CallResult>]=LookupValue("OD_CALL_RESULT", "No Reach") AND PRE('<CallResult>') IS NULL
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0
* JulianDay(Today()+1 )/7, 8, 1), "0")="7"),Today()+3,Today()+2),Today()+1)
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-%%%IIf([<PrimaryContactId>] <> "No
Match Row
Id",JoinFieldValue('<Contact>',[<PrimaryContactId>],'<ContactFullName>'),JoinField
Value('<Lead>',[<LeadId>],'<LeadFullName>'))%%%
```

Followup Calls for Referral or Review Calls Where the Result Is Stay in Touch and the Birthday Is Not in the Current Week and Is Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a referral call or a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client does not occur during the current week but does occur within six months, the workflow rule creates a birthday call followup task to call the lead or client a week before the birthday.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type in an Activity record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
([<Type>]=LookupValue("TODO_TYPE", "Referral Call") OR
[<Type>]=LookupValue("TODO_TYPE", "Review Call")) AND [<PrimaryContactId>] = "No
Match Row Id" AND [<CallResult>]=LookupValue("OD_CALL_RESULT", "Stay In Touch") AND
PRE('<CallResult>') IS NULL AND JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>')
IS NOT NULL AND
JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,
6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,6)+To
Char(Today()+Duration("P1Y"),'YYYY'),
Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,6)+ToChar(Today(),'YYYY'
)))>JulianDay(Today()+7) AND
JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,
6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,6)+To
Char(Today()+Duration("P1Y"),'YYYY'),
Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,6)+ToChar(Today(),'YYYY'
)))<=JulianDay(Today()+Duration("P6M"))
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Birthday Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
Today()+JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,6)+IIf
(JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,6)+ToChar(Tod
ay(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-JulianDay(Today())-
(IIf(IfNull(Mid(1.0*(JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirt
h>'),1,6)+IIf(JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,
6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-7)/
7,8,1),"0")>="7",(IIf(IfNull(Mid(1.0*(JulianDay(Mid(JoinFieldValue('<Lead>',[<Lead
Id>],'<DateofBirth>'),1,6)+IIf(JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<
DateofBirth>'),1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-7)/7,8,1),"0")="7",5,6)),7))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Birthday Call")%%%-
%%%JoinFieldValue('<Lead>',[<LeadId>],'<LeadFullName>')%%%
```

Followup Calls for Birthday Calls Where the Result Is Stay in Touch and the Birthday Is Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a birthday call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is more than six months away, the workflow rule creates a review call followup task to call the lead or client six months from now.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Birthday Call") AND
[<CallResult>]=LookupValue("OD_CALL_RESULT", "Stay In Touch") AND
PRE('<CallResult>') IS NULL AND ([<PrimaryContactId>] <> "No Match Row Id" OR
[<LeadId>] <> "No Match Row Id")
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P
6M"))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-%%%IIf([<PrimaryContactId>] <> "No
Match Row
Id",JoinFieldValue('<Contact>',[<PrimaryContactId>],'<ContactFullName>'),JoinField
Value('<Lead>',[<LeadId>],'<LeadFullName>'))%%%
```

Followup Calls for Review Calls where the Result is Stay in Touch and the Birthday is Within the Current Week or Unknown

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is not known or the birthday is within the current week, the workflow rule creates a review call followup task to call the lead or client six months from now.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
([<Type>]=LookupValue("TODO_TYPE","Review Call") OR
[<Type>]=LookupValue("TODO_TYPE","Referral Call")) AND [<PrimaryContactId>] = "No
Match Row Id" AND [<CallResult>]=LookupValue("OD_CALL_RESULT", "Stay In Touch") AND
PRE('<CallResult>') IS NULL AND
IIf(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>') IS NOT
NULL,(JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth
>'),1,6)+ToChar(Today(),'YYYY'))<JulianDay(Today()),Mid(JoinFieldValue('<Lead>',[<
LeadId>],'<DateofBirth>'),1,6)+ToChar(Today()+Duration("P1Y"),'YYYY'),
Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,6)+ToChar(Today(),'YYYY'
)))<=JulianDay(Today()+7)),[<LeadId>]<>"No Match Row Id")
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P
6M"))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-
%%%JoinFieldValue('<Lead>',[<LeadId>],'<LeadFullName>')%%%
```

Followup Calls for Review Calls Where the Result Is Stay in Touch and the Birthday Is Not Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is more than six months from now, the workflow rule creates a review call followup task to call the lead or client six months from now.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity record.

Trigger Event

The trigger event is When Modified Record Saved

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
([<Type>]=LookupValue("TODO_TYPE","Review Call") OR
[<Type>]=LookupValue("TODO_TYPE","Referral Call")) AND [<PrimaryContactId>] = "No
Match Row Id" AND [<CallResult>]=LookupValue("OD_CALL_RESULT", "Stay In Touch") AND
PRE('<CallResult>') IS NULL AND JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>')
IS NOT NULL AND
JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,
6)+ToChar(Today(),'YYYY'))<JulianDay(Today()),Mid(JoinFieldValue('<Lead>',[<LeadId
>],'<DateofBirth>'),1,6)+ToChar(Today()+Duration("P1Y"),'YYYY'),
Mid(JoinFieldValue('<Lead>',[<LeadId>],'<DateofBirth>'),1,6)+ToChar(Today(),'YYYY'
)))>JulianDay(Today()+Duration("P6M"))
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P
6M"))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-
%%%JoinFieldValue('<Lead>',[<LeadId>],'<LeadFullName>')%%%
```

Followup Calls for Review Calls Where the Result Is Stay in Touch and the Birthday Is Not in the Current Week and Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is not in the current week and is not more than six months from now, the workflow rule creates a review call followup task to call the lead or client a week before the birthday.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Review Call") AND
[<CallResult>]=LookupValue("OD_CALL_RESULT", "Stay In Touch") AND
PRE('<CallResult>') IS NULL AND
JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBirth>') IS NOT NULL AND
JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<Date
ofBirth>'),1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBir
th>'),1,6)+ToChar(Today()+Duration("P1Y"),'YYYY'),
Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBirth>'),1,6)+ToChar(T
oday(),'YYYY')))>JulianDay(Today()+7) AND
JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<Date
ofBirth>'),1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBir
th>'),1,6)+ToChar(Today()+Duration("P1Y"),'YYYY'),
Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBirth>'),1,6)+ToChar(T
oday(),'YYYY')))<=JulianDay(Today()+Duration("P6M"))
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Birthday Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
Today()+JulianDay(Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBirt
h>'),1,6)+IIf(JulianDay(Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<Date
ofBirth>'),1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-JulianDay(Today())-
(IIf(IfNull(Mid(1.0*(JulianDay(Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>]
,'<DateofBirth>'),1,6)+IIf(JulianDay(Mid(JoinFieldValue('<Contact>',[<PrimaryConta
ctId>],'<DateofBirth>'),1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-7)/
7,8,1),"0")>="7",(IIf(IfNull(Mid(1.0*(JulianDay(Mid(JoinFieldValue('<Contact>',[<P
rimaryContactId>],'<DateofBirth>'),1,6)+IIf(JulianDay(Mid(JoinFieldValue('<Contact
>',[<PrimaryContactId>],'<DateofBirth>'),1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-7)/7,8,1),"0")="7",5,6)),7))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Birthday Call")%%%-
%%%JoinFieldValue('<Contact>',[<PrimaryContactId>],'<ContactFullName>')%%%
```

Followup Calls for Review Calls Where the Result Is Stay in Touch and the Birthday Is Not in the Current Week or Is Unknown

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is not in the current week or the birthday is not known, the workflow rule creates a Review Call followup task to call the lead or client six months from now.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE","Review Call") AND
[<CallResult>]=LookupValue("OD_CALL_RESULT","Stay In Touch") AND
PRE('<CallResult>') IS NULL AND
IIf(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBirth>') IS NOT
NULL,JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'
<DateofBirth>'),1,6)+ToChar(Today(),'YYYY'))<JulianDay(Today()),Mid(JoinFieldValue
('<Contact>',[<PrimaryContactId>],'<DateofBirth>'),1,6)+ToChar(Today()+Duration("P
1Y"),'YYYY'),Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBirth>'),
1,6)+ToChar(Today(),'YYYY')))<=JulianDay(Today()+7),[<PrimaryContactId>]<>"No
Match Row Id")
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P
6M"))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-
%%%JoinFieldValue('<Contact>',[<PrimaryContactId>],'<ContactFullName>')%%%
```

Followup Calls for Review Calls Where the Result Is Stay in Touch and the Birthday Is Not Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client more than six months from now, the workflow rule creates a review call followup task to call the lead or client six months from now.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is an Activity record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE","Review Call") AND
[<CallResult>]=LookupValue("OD_CALL_RESULT","Stay In Touch") AND
PRE('<CallResult>') IS NULL AND
```

```
JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBirth>') IS NOT NULL AND
JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<Date
ofBirth>'),1,6)+ToChar(Today(),'YYYY'))<JulianDay(Today()),Mid(JoinFieldValue('<Co
ntact>',[<PrimaryContactId>],'<DateofBirth>'),1,6)+ToChar(Today()+Duration("P1Y"),
'YYYY'),Mid(JoinFieldValue('<Contact>',[<PrimaryContactId>],'<DateofBirth>'),1,6)+
ToChar(Today(),'YYYY')))>JulianDay(Today()+Duration("P6M"))
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P
6M"))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-
%%%JoinFieldValue('<Contact>',[<PrimaryContactId>],'<ContactFullName>')%%%
```

Workflow Rules for Scheduling Calls with Clients

When a lead decides to purchase a product, the producer converts the lead to a contact and sets the contact type field to Client. The producer must keep in regular touch with the new client by having review calls or birthday calls scheduled for the client. When the producer creates the contact record for the client, the producer sets the Call Frequency field to 1-2 Times/Year. When the Call Frequency field is updated, the following workflow rules create a Review Call or Birthday Call followup task to call the client either six months from now or one week before the birthday, whichever occurs first.

Schedule Calls with Clients Where the Birthday Is Not in the Current Week and Is Within Six Months

This workflow rule is triggered when a producer updates the Call Frequency field on the contact (client) record to 1-2 Times/Year. If the birthday of the client is not within the current week and is not more than six months from now, the workflow rule creates a birthday call task to call the client a week before the birthday.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is a Contact record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<CallFrequency>] <> IfNull(PRE('<CallFrequency>'),"Invalid") AND
[<CallFrequency>]=LookupValue('PROF_CALL_CLASS','1-2 Times/Year') AND
[<DateofBirth>] IS NOT NULL AND (JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1, 6)
+ ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>], 1, 6) +
ToChar(Today()+Duration("P1Y"),'YYYY'),Mid([<DateofBirth>],1, 6) + ToChar(Today(),
'YYYY'))) <= JulianDay(Today()+Duration("P6M"))) AND
(JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) <
JulianDay(Today()), Mid([<DateofBirth>], 1, 6) +
ToChar(Today()+Duration("P1Y"),'YYYY'),Mid([<DateofBirth>],1, 6) + ToChar(Today(),
'YYYY'))) > JulianDay(Today()+7))
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Birthday Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
Today()+JulianDay(Mid([<DateofBirth>],1,6)+IIf(JulianDay(Mid([<DateofBirth>],1,6)+
ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-JulianDay(Today())-
(IIf(IfNull(Mid(1.0*(JulianDay(Mid([<DateofBirth>],1,6)+IIf(JulianDay(Mid([<Dateof
Birth>],1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-7)/
7,8,1),"0")>="7",(IIf(IfNull(Mid(1.0*(JulianDay(Mid([<DateofBirth>],1,6)+IIf(Julia
nDay(Mid([<DateofBirth>],1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-7)/7,8,1),"0")="7",5,6)),7))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Birthday Call")%%%-
%%%FieldValue('<ContactFullName>')%%%
```

Schedule Calls with Clients Where the Birthday Is Unknown, Is in the Current Week, or Is Not Within Six Months

This workflow rule is triggered when a producer updates the Call Frequency field on the contact (client) record to 1-2 Times/Year. If the birthday of the client is not known, or is within the current week, or is more than six months from now, the workflow rule creates a review call task to call the contact six months from now.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is a Contact record.

Trigger Event

The trigger event is When Modified Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<CallFrequency>] <> IfNull(PRE('<CallFrequency>'),"Invalid") AND
[<CallFrequency>]=LookupValue('PROF_CALL_CLASS','1-2 Times/Year') AND
IIf([<DateofBirth>] IS NOT NULL, ((JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1,
6) + ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>], 1, 6) +
ToChar(Today()+Duration("P1Y"),'YYYY'),Mid([<DateofBirth>],1, 6) + ToChar(Today(),
'YYYY'))) > JulianDay(Today()+Duration("P6M"))) OR
(JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) <
JulianDay(Today()), Mid([<DateofBirth>],1,6) +
ToChar(Today()+Duration("P1Y"),'YYYY'),Mid([<DateofBirth>],1, 6) + ToChar(Today(),
'YYYY'))) <= JulianDay(Today()+7))),1)
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P
6M"))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-
%%%FieldValue('<ContactFullName>')%%%
```

Schedule Calls with Clients Where the Birthday Is Within Six Months and Is Not in the Current Week

This workflow rule is triggered when a producer updates the Call Frequency field on the contact (client) record to 1-2 Times/Year. If the birthday of the client is not more than six months from now and is not within the current week, the workflow rule creates a birthday call task to call the client one week before the birthday.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is a Contact record.

Trigger Event

The trigger event is When New Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<CallFrequency>]=LookupValue('PROF_CALL_CLASS','1-2 Times/Year') AND
[<DateofBirth>] IS NOT NULL AND (JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1, 6)
+ ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>], 1, 6) +
ToChar(Today()+Duration("P1Y"),'YYYY'),Mid([<DateofBirth>],1, 6) + ToChar(Today(),
'YYYY'))) <= JulianDay(Today()+Duration("P6M"))) AND
(JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) <
JulianDay(Today()), Mid([<DateofBirth>], 1, 6) +
ToChar(Today()+Duration("P1Y"),'YYYY'),Mid([<DateofBirth>],1, 6) + ToChar(Today(),
'YYYY'))) > JulianDay(Today()+7))
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Birthday Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
Today()+JulianDay(Mid([<DateofBirth>],1,6)+IIf(JulianDay(Mid([<DateofBirth>],1,6)+
ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-JulianDay(Today())-
(IIf(IfNull(Mid(1.0*(JulianDay(Mid([<DateofBirth>],1,6)+IIf(JulianDay(Mid([<Dateof
Birth>],1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-7)/
7,8,1),"0")>="7",(IIf(IfNull(Mid(1.0*(JulianDay(Mid([<DateofBirth>],1,6)+IIf(Julia
```

```
nDay(Mid([<DateofBirth>],1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY')))
-7)/7,8,1),"0")="7",5,6)),7))
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Birthday Call")%%%
%%%FieldValue('<ContactFullName>')%%%
```

Schedule Tasks for Calls to Clients where the Birthday is in the Current Week or is Not Within Six Months

The workflow rule described in this section is triggered when a producer updates the Call Frequency field on the contact (client) record to 1-2 Times/Year. If the birthday of the client is within the current week or is more than six months from now, the workflow rule creates a review call task to call the contact six months from now.

NOTE: The expressions in this topic appear across several lines due to length. All expressions in this topic must be entered in fields and the expression builder as one line and cannot contain any spaces.

Workflow Rule Details

This topic describes the details of the workflow rule.

Record Type

The record type is a Contact record.

Trigger Event

The trigger event is When New Record Saved.

Rule Condition

The Rule Condition field contains the workflow rule condition.

Enter the following expression in the Rule Condition field:

```
[<CallFrequency>]=LookupValue('PROF_CALL_CLASS','1-2 Times/Year') AND
IIf([<DateofBirth>] IS NOT NULL, ((JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1,
6) + ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>], 1, 6) +
ToChar(Today()+Duration("P1Y"),'YYYY'),Mid([<DateofBirth>],1, 6) + ToChar(Today(),
'YYYY'))) > JulianDay(Today()+Duration("P6M"))) OR
(JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) <
JulianDay(Today()), Mid([<DateofBirth>],1,6) +
ToChar(Today()+Duration("P1Y"),'YYYY'),Mid([<DateofBirth>],1, 6) + ToChar(Today(),
'YYYY'))) <= JulianDay(Today()+7))),1)
```

Workflow Action Details

This topic describes the details of the workflow action.

Action Type

The action type is Create Task.

Task Type

The task type is a Review Call.

Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1),
"0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P6M")
)
```

Subject

The Subject field contains the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.

CAUTION: In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into the expression builder. When percent signs are pasted into the expression builder, the expression builder displays an internal error.

For more information about expressions, see *Oracle CRM On Demand Online Help*.

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-
%%%FieldValue('<ContactFullName>')%%%
```

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