ORACLE® CRM On Demand

Configuration Guide for Oracle CRM On Demand Life Sciences Edition

Release 20

June 2012

Contents

1 What's New in This Release

What's New in Configuration Guide for Oracle CRM On Demand Life Sciences Edition, Release 20

This guide is for company administrators using Oracle CRM On Demand Life Sciences Edition. Company administrators use Oracle CRM On Demand to manage the company profile, global defaults, users, access controls, data loads, and custom page layouts, in addition to other tasks.

Table 1 lists the changes that were made in this version of the documentation to support this release of the software.

Table 1. What's New in Configuration Guide for Oracle CRM On Demand Life Sciences Edition, Release 20

Topic	Description
"Record Types for Oracle CRM On Demand Life Sciences Edition" on page 15	Modified topic. The following objects have been added to the list of record types: ■ Blocked Products ■ Order ■ Order Item ■ Sample Request ■ Sample Request Item You can provision for Oracle CRM On Demand Life Sciences Edition with these record type.
"Custom Page Layouts" on page 20	Modified topic. The following record types now support custom page layout: ■ Attendee Call ■ MedEd Invitee ■ Order ■ Order Item ■ Sample Request ■ Sample Request Item

Table 1. What's New in Configuration Guide for Oracle CRM On Demand Life Sciences Edition, Release 20

Topic	Description
"Page Layouts for the LS Field Sales Rep Role" on page 23	Modified topic. The following page layouts can now be customized to support the LS Field Sales Rep role: ■ Attendee Call Page Layout ■ MedEd Invitee Page Layout ■ Order Page Layout ■ Order Item ■ Sample Request ■ Sample Request Item
"Field Setup and Layout for the LS Field Sales Rep Role Page Layouts" on page 24	Modified topic. You can now customize the field setup and layout for the following page layouts: ■ LS Attendee Call Page Layout ■ LS MedEd Invitee Page Layout ■ LS Order Page Layout ■ Order Item ■ Sample Request ■ Sample Request Item The following field has been added to the LS Contact Page Layout: Blocked Reason Code.

Table 1. What's New in Configuration Guide for Oracle CRM On Demand Life Sciences Edition, Release 20

Topic	Description
"Related Information Sections for the LS Field Sales Rep Role Page Layouts" on page 43	Modified topic. ■ You can display Invitees for the LS MedEd Event Page Layout. ■ You can display Order Items for the LS Order Page Layout. ■ You can display Blocked Products for the LS Contact Page Layout. ■ You can display related information sections for the following page layouts: LS Attendee Call Page Layout LS MedEd Invitee Page Layout LS Order Page Layout LS Sample Request Page Layout LS Sample Request Item Page Layout ■ You can display Custom Object 01-15, as required, for the following page layouts: LS Allocation Page Layout LS Inventory Period Page Layout LS MedEd Event Page Layout LS MedEd Invitee Page Layout LS Order Page Layout LS Order Item Page Layout LS Sample Inventory Page Layout LS Sample Lot Page Layout LS Sample Request Page Layout LS Sample Request Item Page Layout LS Sample Transaction Page Layout LS Transaction Item Page Layout ■ You can display Sample Requests for the following page layouts: LS Account Call Page Layout LS Contact Call Page Layout LS Attendee Call Page Layout

Table 1. What's New in Configuration Guide for Oracle CRM On Demand Life Sciences Edition, Release 20

Topic	Description
"Access Levels for the LS Field Sales Rep Role" on page 51	Modified topic. Top-level profile access levels have been added for the following record types: ■ Blocked Products ■ Order ■ Order Item ■ Sample Request ■ Sample Request Item The access level to Custom Object 01-15 has been added for the following record types: ■ Allocation ■ Inventory Period ■ MedEd Event ■ MedEd Invitee ■ Order ■ Order Item ■ Sample Inventory ■ Sample Lot ■ Sample Request ■ Sample Request Item ■ Sample Transaction ■ Transaction Item The access level to Blocked Products has been added for the Contact record type.
"Record Type Access for the LS Field Sales Rep Role" on page 57	Modified topic. Record type access has been added for the following: ■ Blocked Products ■ Custom Object 01-15 ■ Order ■ Order Item ■ Sample Request ■ Sample Request Item

Table 1. What's New in Configuration Guide for Oracle CRM On Demand Life Sciences Edition, Release 20

<table>
<tr><th>Topic</th><th>Description</th></tr>
<tr><td>“Privileges for the LS Field Sales Rep Role” on page 59</td><td>Modified topic. The following privileges must now be configured:
CRM Sales: Enable Order Access
NOTE: This privilege is required to access and use the following record types: Sample Request and Sample Request Item.
Industry Specific Life Sciences: Manage MedEd Events Access</td></tr>
<tr><td>“Tab Access and Order for the LS Field Sales Rep Role” on page 60</td><td>Modified topic. Added tab access information for the following:
Custom Object 01-15
Order
Order Item
Sample Request
Sample Request Item</td></tr>
<tr><td>“Page Layout Assignment for the LS Field Sales Rep Role” on page 61</td><td>Modified topic. The following page layout assignments are available for the LS Field Sales Rep role:
LS Attendee Call Page Layout
LS MedEd Invitee Page Layout
LS Order Page Layout
LS Order Item Page Layout
LS Sample Request Page Layout
LS Sample Request Item Page Layout</td></tr>
<tr><td>“Creating a Business Process to Lock Validated Address Records” on page 75</td><td>New topic. Describes how to lock validated address records so that after an address record is created and validated, it cannot be modified.</td></tr>
</table>

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

Topic	Description
“Creating a Business Process to Lock Records in General” on page 76	New topic. Describes how to create a business process to generically lock the following record types: ■ Account ■ Business Plan ■ Contact ■ Lead ■ Objective ■ Opportunity ■ Service Request
Chapter 8, “Key Account Management for Oracle CRM On Demand Life Sciences Edition”	New chapter. Describes how to set up key account management for business planning, budgeting, and marketing, so that pharmaceutical sales representatives can manage medical event budgets, fund requests, market development funds, and associated costs.

2 Getting Started with Oracle CRM On Demand Life Sciences Edition

This chapter describes the initial tasks that must be completed before you can configure and start using Oracle CRM On Demand Life Sciences Edition. This chapter includes the following topics:

About This Guide

This guide describes the tasks that are performed to configure Oracle CRM On Demand Life Sciences Edition. It provides details of the suggested page layouts and roles that you can set up to support the management of life sciences information and the pharmaceutical sales process.

The configuration settings in this guide are suggested settings for the Oracle CRM On Demand Life Sciences Edition. Your company requirements might differ from the suggested settings.

This guide also provides examples of tasks and processes that users perform in Oracle CRM On Demand Life Sciences Edition. For information about configuring and setting up the standard edition of Oracle CRM On Demand, see *Oracle CRM On Demand Online Help*.

About Oracle CRM On Demand Industry Editions

Oracle CRM On Demand Industry Editions provide capabilities for the following industries. These capabilities help customers to meet industry-specific business needs.

- Automotive
- Financial services

  NOTE: See *Configuration Guide for Oracle CRM On Demand Financial Services Edition*.

- High technology
- Life sciences

  NOTE: See *Configuration Guide for Oracle CRM On Demand Life Sciences Edition* (this guide).

For customers to use Oracle CRM On Demand Industry Editions (Oracle CRM On Demand Financial Services Edition or Oracle CRM On Demand Life Sciences Edition), the functionality that is specific to a particular industry such as financial services, life sciences, automotive, or high technology, must be provisioned.

Provisioning refers to the process of setting up Oracle CRM On Demand for a company and the company's employees. Provisioning is performed by Customer Care on behalf of individual customer companies. For example, if a customer is using Oracle CRM On Demand Life Sciences Edition, then Customer Care makes the appropriate pages available to users and sets up the life sciences administrator role as described in *Oracle CRM On Demand Provisioning Guide*. When the role is set up, life sciences administrators can start to configure Oracle CRM On Demand Life Sciences Edition. For more information, see "Process of Configuring Oracle CRM On Demand Life Sciences Edition" on page 16.

About Oracle CRM On Demand Life Sciences Edition

Your company can customize the tasks and processes to support your business requirements. Using Oracle CRM On Demand Life Sciences Edition, you can manage the following:

- Account management
- Activity management (Contact Call and Account Call Activity)
- Business planning
- Contact management
- Medical education event management
- Personalized content delivery
- Samples management

For more information about administering order and sample request management using Oracle CRM On Demand, see *Oracle CRM On Demand Online Help*.

About Provisioning Oracle CRM On Demand Life Sciences Edition

If your company plans to use Oracle CRM On Demand Life Sciences Edition, your first task is to contact Customer Care and ask them to set up your company to use Oracle CRM On Demand Life Sciences Edition. The initial setup process, which is referred to as *provisioning*, makes available Web pages, features, and fields, which can differ from the standard edition of Oracle CRM On Demand, but are relevant to your business.

When Customer Care provisions Oracle CRM On Demand Life Sciences Edition for your company, they add a number of life sciences record types to your application. For more information about these life sciences record types, see "Process of Configuring Oracle CRM On Demand Life Sciences Edition" on page 16 and "Record Types for Oracle CRM On Demand Life Sciences Edition" on page 15.

Customer Care also creates the access profiles for Oracle CRM On Demand Life Sciences Edition and the life sciences role, and assigns this role to your company administrator. This role gives company administrators the privileges and access options that they require to configure the application, create other roles, and grant the same privileges and access options to other roles. The configuration tasks are described in the following chapters.

Customer Care can also set up other features in Oracle CRM On Demand Life Sciences Edition, including the following:

- Custom record types
- How your company accesses Oracle CRM On Demand
- How your company manages large volumes of data
- How your company handles record locking for certain life sciences record types, in order to meet regulatory guidelines to enhance data integrity and data quality

Record Types for Oracle CRM On Demand Life Sciences Edition

In Oracle CRM On Demand Life Sciences Edition, the following record types for life sciences have preconfigured fields for use in life sciences industries. You can use these fields to add additional custom fields. You configure these life sciences record types only if it is required for your company's specific needs.

When Customer Care provisions Oracle CRM On Demand Life Sciences Edition for your company, they add the following life sciences record types to your application:

- Account
- Activity
- Allocation
- Business Plan
- Blocked Products
- Contact
- Contact Best Time
- Contact State License
- Inventory Audit Report
- Inventory Period
- MedEd Event
- Messaging Plan
- Messaging Plan Item
- Messaging Plan Item Relations
- Message Response
- Order
- Order Item
- Objective

- Plan Accounts
- Plan Contact
- Plan Opportunity
- Sample Disclaimer
- Sample Inventory
- Sample Lot
- Sample Request
- Sample Request item
- Sample Transaction
- Signature
- Smart Call
- Solution
- Transaction Item

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

Process of Configuring Oracle CRM On Demand Life Sciences Edition

To configure Oracle CRM On Demand Life Sciences Edition, perform the following tasks:

1. If you have not already done so, contact Customer Care, and ask them to provision your application to use Oracle CRM On Demand Life Sciences Edition.
2. Sign in to Oracle CRM On Demand.
3. Configure the field setup.

   For more information, see "Configuring the Fields for Oracle CRM On Demand Life Sciences Edition" on page 17.
4. Set up the page layouts for each role that you plan to create for Oracle CRM On Demand Life Sciences Edition.

   For more information, see "Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition" on page 21.
5. Set up the access profiles for the roles that you plan to create.

   For more information, see "Setting Up Access Profiles for Life Sciences Roles" on page 49.
6. Create roles for Oracle CRM On Demand Life Sciences Edition.

   For more information, see "Creating Life Sciences Roles" on page 56.

7 Configure record locking for Oracle CRM On Demand Life Sciences Edition.

For more information, see "Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition" on page 63.

8 If your company plans to use samples management functionality, load the seed data for the following:

- Product Categories
- Product
- Sample Lot
- Users
- Inventory Period
- Allocation
- Sample Inventory

For more information, see Chapter 6, "Initial Data Loading for Oracle CRM On Demand Life Sciences Edition."

Configuring the Fields for Oracle CRM On Demand Life Sciences Edition

Use the following procedure to configure the fields for Oracle CRM On Demand Life Sciences Edition. This task is a step in "Process of Configuring Oracle CRM On Demand Life Sciences Edition" on page 16.

To configure the fields for Oracle CRM On Demand Life Sciences Edition

1 In Oracle CRM On Demand, click Admin, and then Application Customization.

2 In the Record Type Setup section, click the link for the required record type, for example, Allocation.

3 In the Field Management section, click the required Field Setup link, for example, Allocation Field Setup.

4 On the Fields page, click New Field, Rename Field, the Edit link or the Edit Picklist link, as necessary, and configure the fields as required to support your business processes.

See the following for more information about configuring fields, including custom fields, for Oracle CRM On Demand Life Sciences Edition:

- "About Sample Transaction Field Setup" on page 18
- "About Account Contact Field Setup" on page 18
- "About Call Type Picklist Setup for Account and Contact" on page 18
- "About Required Fields for Account Call and Contact Call" on page 18

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

About Sample Transaction Field Setup

For Sample Transaction Field Setup, it is recommended that you do not customize or change the following order of the Type picklist as the cascading picklist functionality may be affected.

- Transfer Out
- Samples Lost
- Inventory Adjustment
- Disbursement
- Transfer In

About Account Contact Field Setup

For Account Contact Field Setup, any custom fields that you create must not be required for the Account Contact object; that is, the Required checkbox must not be selected.

About Call Type Picklist Setup for Account and Contact

Because of specialized coding, customizing the Activity: Call Type is not supported. The predefined Call Type values are Attendee, Account, Professional, and General, and they must not to be altered.

About Required Fields for Account Call and Contact Call

If using the Auto Call functionality, then the page layout for Account Call and the page layout for Contact Call must not contain any additional required fields. The fields that are currently required for Account Call and Contact Call are automatically seeded in the Auto Call process, and it is not recommended that you add any additional fields that are required.

3 Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition

This chapter describes how to set up page layouts for life sciences record types in Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

Page Layouts in Oracle CRM On Demand Life Sciences Edition

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

Generic Page Layouts

In Oracle CRM On Demand Life Sciences Edition, the following record types have preconfigured fields that can be used in all industries (life sciences, financial services, automotive, and high technology) and have many of the page layouts created for you:

- Blocked Products
- Contact Best Time
- Contact State License
- Inventory Audit Report
- Messaging Plan Item
- Messaging Plan Item Relations
- Message Response
- Plan Accounts
- Plan Contact
- Plan Opportunity
- Sample Disclaimer
- Signature
- Smart Call

Custom Page Layouts

It is recommended that company administrators set up custom page layouts for the following record types for each role in Oracle CRM On Demand Life Sciences Edition:

- Account (Account, Account Relationship, Account Contact)
- Activity (Account Call, Contact Call, Smart Call, Attendee Call)
- Allocation
- Business Plan
- Contact (Contact, Contact Relationship)
- Inventory Period
- MedEd Event
- MedEd Invitee
- Messaging Plan
- Order
- Order Item
- Objective
- Sample Inventory
- Sample Lot
- Sample Request
- Sample Request Item
- Sample Transaction
- Solution
- Transaction Item

Dynamic Page Layouts

Administrators can set up dynamic page layouts for the following record types for each role in Oracle CRM On Demand Life Sciences Edition:

- Activity
- Allocation
- Business Plan
- Contact
- Inventory Audit Report
- MedEd Event
- Messaging Plan
- Objective

- Sample Transaction
- Solution

Setting Up Page Layouts for Oracle CRM On Demand Life Sciences 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 make available the related information in the page layout.

Complete the steps in the following procedure for each page layout that you want to set up in Oracle CRM On Demand Life Sciences Edition. The information cross referenced in this procedure shows the details of the custom page layouts and related information sections that company administrators set up for the Oracle CRM On Demand Life Sciences Edition.

This task is a step in "Process of Configuring Oracle CRM On Demand Life Sciences Edition" on page 16.

To set up a page layout for Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and navigate to Application Customization.
2. In the Record Type Setup section, click the link for the required record type, for example, click the Account record type.
3. In the Page Layout Management section, click the link for the required page layout type, for example, click the link for Account Page Layout.
4. Perform the following steps:
   a. On the *Record Type* Page Layout page, click Copy (the 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.

      NOTE: *Record Type* is a placeholder for the name of the Page Layout page.

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

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

   For information about the page layouts that can be customized for the LS Field Sales Rep role, see "Page Layouts for the LS Field Sales Rep Role" on page 23.
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.

   NOTE: *Record Type* is a placeholder for the name of the Page Layout page.

6 In the Section Names Setup page, enter the labels for any new sections that you want to set up on the page layout or edit the display name of the default sections as required, then click Save.

For information about the page sections in the custom page layouts for the LS Field Sales Rep role, see "Page Sections for the LS Field Sales Rep Role Page Layouts" on page 24.

7 On the *Record Type* Page Layout page, click the Edit link next to the layout that you want to configure.

NOTE: *Record Type* is a placeholder for the name of the Page Layout page.

8 In the Page Layout wizard, go to Step 2 (Field Setup), and specify the field setup for the page layout.

For each field, select the Required or Read-only check box, as necessary to support your business processes. For information about the field setup in the custom page layouts for the LS Field Sales Rep role, see "Field Setup and Layout for the LS Field Sales Rep Role Page Layouts" on page 24.

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

Click the 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. For information about the field layout in the custom page layouts for the LS Field Sales Rep role, see "Field Setup and Layout for the LS Field Sales Rep Role Page Layouts" on page 24.

10 In the Page Layout wizard, go to Step 4 (Related Information), and configure the related information that is available on the page.

Click the arrows to move the Related Information items to the Displayed Information or Available Information sections, as required. For information about the related information sections in the custom page layouts for the LS Field Sales Rep role, see "Related Information Sections for the LS Field Sales Rep Role Page Layouts" on page 43.

11 Click Finish.

Page Layout Configurations for the LS Field Sales Rep Role

This topic describes the recommended page layout modifications that life sciences administrators configure for the LS Field Sales Rep role. It contains the following information:

- "Page Layouts for the LS Field Sales Rep Role" on page 23
- "Page Sections for the LS Field Sales Rep Role Page Layouts" on page 24
- "Field Setup and Layout for the LS Field Sales Rep Role Page Layouts" on page 24
- "Related Information Sections for the LS Field Sales Rep Role Page Layouts" on page 43

Page Layouts for the LS Field Sales Rep Role

Table 2 shows examples of the page layouts that you can customize to support the LS Field Sales Rep role. Recommendations include, for example, that you copy the Account Page Standard Layout (belonging to the Account record type) and rename it to LS Account Page Layout. For information about the steps involved in configuring page layouts, see "Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition" on page 21.

Table 2. Page Layouts for the LS Field Sales Rep Role

Record Type	Page Layout Type	Copy Existing Layout	Rename to
Account	Account Page Layout	Account Page Standard Layout	LS Account Page Layout
Account	Account Relationship Page Layout	Account Relationship Page Standard Layout	LS Account Relationship Page Layout
Account	Account Contact Page Layout	Account Contact Page Standard Layout	LS Account Contact Page Layout
Activity	Account Call Page Layout	Call Page Standard Layout	LS Account Call Page Layout
Activity	Contact Call Page Layout	Call Page Standard Layout	LS Contact Call Page Layout
Activity	Smart Call Page Layout	Call Page Standard Layout	LS Smart Call Page Layout
Activity	Attendee Call Page Layout	Call Page Standard Layout	LS Attendee Call Page Layout
Allocation	Allocation Page Layout	Allocation Page Standard Layout	LS Allocation Page Layout
Business Plan	Business Plan Page Layout	Business Plan Page Standard Layout	LS Business Plan Page Layout
Contact	Contact Page Layout	Contact Page Standard Layout	LS Contact Page Layout
Contact	Contact Relationship Page Layout	Contact Relationship Page Standard Layout	LS Contact Relationship Page Layout
Inventory Period	Inventory Period Page Layout	Inventory Period Page Standard Layout	LS Inventory Period Page Layout
MedEd Event	MedEd Page Layout	MedEd Event Page Standard Layout	LS MedEd Event Page Layout
MedEd Event	MedEd Invitee Page Layout	MedEd Invitee Page Standard Page Layout	LS MedEd Invitee Page Layout

Table 2. Page Layouts for the LS Field Sales Rep Role

Record Type	Page Layout Type	Copy Existing Layout	Rename to
Messaging Plan	Messaging Plan Page Layout	Messaging Plan Page Standard Layout	LS Messaging Plan Page Layout
Objective	Objective Page Layout	Objective Page Standard Layout	LS Objective Page Layout
Order	Order Page Layout	Order Page Standard Layout	LS Order Page Layout
Order Item	Order Item Page Layout	Order Item Page Standard Layout	LS Order Item Page Layout
Sample Inventory	Sample Inventory Page layout	Sample Inventory Page Standard Layout	LS Sample Inventory Page Layout
Sample Lot	Sample Lot Page Layout	Sample Lot Page Standard Layout	LS Sample Lot Page Layout
Sample Request	Sample Request Page Layout	Sample Request Page Standard Layout	LS Sample Request Page Layout
Sample Request Item	Sample Request Item Page Layout	Sample Request Item Page Standard Layout	LS Sample Request Item Page Layout
Sample Transaction	Sample Transaction Page Layout	Sample Transaction Page Standard Layout	LS Sample Transaction Page Layout
Solution	Solution Page Layout	Solution Page Standard Layout	LS Solution Page Layout
Transaction Item	Transaction Item Page Layout	Transaction Item Page Standard Layout	LS Transaction Item Page Layout

Page Sections for the LS Field Sales Rep Role Page Layouts

Rename the page sections for the custom page layouts that support the LS Field Sales Rep role only if your company has a requirement to change the section names. For information about the steps involved in configuring page layouts, see "Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition" on page 21.

Field Setup and Layout for the LS Field Sales Rep Role Page Layouts

Table 3 shows the field setup and layout that company administrators configure for the custom page layouts that support the LS Field Sales Rep role. Recommendations include, for example, that you set up the (required, read-only, or optional) field layout as shown in Table 3 for the following page sections in the LS Account Page Layout:

- Key Account Information
- Account Sales Information
- Additional Information

For information about the steps involved in configuring page layouts, see "Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition" on page 21.

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Account	LS Account Page Layout	**Key Account Information**	
		Account Name	Required
		Location	Optional
		Parent Account	Optional
		Main Phone Number (#)	Optional
		Main Fax Number (#)	Optional
		Web Site	Optional
		Account Currency	Optional
		Account Sales Information	
		Account Type	Optional
		Priority	Optional
		Industry	Optional
		Public Company	Optional
		Region	Optional
		Reference	Optional
		Reference as of	Optional
		Annual Revenues	Optional
		Number of Employees	Optional
		Primary Contact	Optional
		Additional Information	
		Billing	Optional
		Owner	Optional
		Shipping	Optional
		Modified External	Read-only
		Created External	Read-only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Account	LS Account Contact Page Layout	Contact Name	Required
		Primary Contact	Read-only
		Last Name	Read-only
		First Name	Read-only
		Job Title	Read-only
		Contact Role	Read-only
		Work Phone #	Read-only
		Email	Read-only
Account	LS Account Relationship Page Layout	**Key Relationship Information**	
		Related Account	Required
		Role	Required
		Reverse Role	Required
		Relationship Detail Information	
		Start Date	Optional
		End Date	Optional
		Status	Optional
		Comments	Optional

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Activity	LS Account Call Page Layout	**Key Call Information**	
		Subject	Required
		Primary Contact	Optional
		Account	Required
		Address	Optional
		Smart Call	Optional
		Status	Optional
		Activity Currency	Optional
		Objective	Optional
		Start Time	Required
		Duration	Read-only
		End Time	Required
		Type	Required
		Ref Number (#)	Optional
		Additional Information	
		Cost	Optional
		Owner	Required
		Modified External	Read-only
		Paper Sign	Optional
		Private	Optional
		Created External	Read-only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Activity	LS Contact Call Page Layout	**Key Call Information**	
		Subject	Required
		Primary Contact	Required
		Account	Required
		Address	Optional
		Smart Call	Optional
		Status	Optional
		Activity Currency	Optional
		Objective	Optional
		Start Time	Required
		Duration	Read-only
		End Time	Required
		Type	Required
		Ref Number (#)	Optional
		Additional Information	
		Cost	Optional
		Owner	Required
		Modified External	Read-only
		Paper Sign	Optional
		Private	Optional
		Created External	Read-only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Activity	LS Smart Call Page Layout	**Key Smart Call Information**	
		Subject	Required
		Primary Contact	Optional
		Account	Optional
		Address	Optional
		Smart Call	Optional
		Status	Optional
		Activity Currency	Optional
		Objective	Optional
		Start Time	Required
		Duration	Read-only
		End Time	Required
		Type	Required
		Ref Number (#)	Optional
		Additional Information	
		Cost	Optional
		Owner	Required
		Modified External	Read-only
		Paper Sign	Optional
		Private	Optional
		Created External	Read-only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Activity	LS Attendee Call Page Layout	**Key Call Information**	
		Subject	Required
		Primary Contact	Required
		Account	Read-Only
		Address	Optional
		Smart Call	Optional
		Status	Optional
		Activity Currency	Optional
		Objective	Optional
		Start Time	Required
		End Time	Required
		Duration	Read-Only
		Type	Required
		Ref Number (#)	Optional
		Additional Information	
		Owner	Required
		Book	Optional
		Paper Sign	Optional
		Private	Optional

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Allocation	LS Allocation Page Layout	**Key Allocation Information**	
		Allocation Type	Required
		Active	Read-only
		Owner	Required
		Sample	Required
		Max Qty	Optional
		Allocation Qty	Optional
		Max Qty Per Customer	Optional
		Sample: Description	Read-Only
		Id	Read-Only
		Start Date	Required
		End Date	Optional
		Owner: First Name	Read-Only
		Owner: Last Name	Read-Only
		Stop Sampling	Optional
		Order By	Optional
		User Detail	Read-Only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Business Plan	LS Business Plan Page Layout	**Key Plan Information**	
		Plan Name	Required
		Period	Required
		Period: Start Date	Read-only
		Period: End Date	Read-only
		Type	Required
		Status	Required
		Owner	Optional
		Description	Optional
		Product Name	Optional
		Plan Revenue	Optional
		Currency	Optional
		Exchange Date	Optional
		SWOT Analysis	
		Strengths	Optional
		Weakness	Optional
		Opportunities	Optional
		Threats	Optional

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Contact	LS Contact Page Layout	**Key Contact Information**	
		Title (Mr, or Ms)	Optional
		First Name	Required
		Middle Name	Optional
		Last Name	Required
		Account	Optional
		Time Zone	Optional
		Work Phone Number (#)	Optional
		Work Fax Number (#)	Optional
		Cellular Phone Number (#)	Optional
		Email	Optional
		Job Title	Optional
		Contact Detail Information	
		Contact Type	Optional
		Department	Optional
		Manager	Optional
		Lead Source	Optional
		Contact Currency	Optional
		Assistant name	Optional
		Assistant Phone Number (#)	Optional
		Private	Optional
		Never Email	Optional
		Blocked Reason Code	Read-only
		Additional Information	
		Account	Optional
		Owner	Optional
		Contact	Optional
		Modified External	Read-only
		Created External	Read-only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Contact	LS Contact Relationship Page Layout	**Key Contact Relationship Information**	
		Related Contact	Required
		Role	Required
		Reverse Role	Required
		Relationship Detail Information	
		Start Date	Optional
		End Date	Optional
		Status	Optional
		Description	Optional
Inventory Period	LS Inventory Period Page Layout	**Inventory Period Information**	
		Start Date	Required
		End Date	Optional
		Active	Required
		Owner	Required
		Created	Read-only
		Modified	Read-only
		Inventory Period Misc Info	
		Reconciled	Required

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
MedEd Event	LS MedEd Event Page Layout	**MedEd Event Detail Information**	
		Name	Required
		Location	Optional
		Start Date	Required
		End Date	Required
		Confirm Date	Optional
		Status	Optional
		Type	Optional
		Budget	Optional
		Max Attendees	Optional
		Product	Optional
		Product Category	Optional
		CME Credit	Optional
		Additional Information	
		Owner	Optional
		Modified	Read-only
MedEd Event	LS MedEd Invitee Page Layout	**Key Invitee Information**	
		Contact Name	Required
		Session Detail	Optional
		Comments	Optional
		Invitee Status	Required
		Additional Information	
		Created	Read-only
		Modified External	Read-only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Messaging Plan	LS Messaging Plan Page Layout	**Key Message Plan Information**	
		Name	Required
		Type	Required
		Product	Required
		Status	Required
		Verify	Read-only
		Code	Optional
		Segment	Optional
		Owner	Required
		Start Date	Optional
		Expiration Date	Optional
		Release Date	Optional
		Lock Sequence	Required
		Disclosure Mandatory	Required
		Enable Followup	Required
		Additional Message Plan Information	
		Audience	Optional
		Comment	Optional
		Description	Optional

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Objective	LS Objective Page Layout	**Key Objective Information**	
		Objective Name	Required
		Plan Name	Optional
		Type	Required
		Status	Required
		Period Name	Read-only
		Period: Start Date	Read-only
		Period: End Date	Read-only
		Account Name	Optional
		Contact Name	Optional
		Product Name	Optional
		Target	
		Objective Revenue	Optional
		Currency	Optional
		Exchange Date	Optional
		Target Audience	Optional
		Objective Target	Optional
		Objective Units	Optional
		Additional Information	
		Description	Optional
		Owner	Optional

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Order	LS Order Page Layout	**Key Order Information**	
		Order Number	Read-only
		Account	Required
		Opportunity	Required
		Contact	Required
		Order Created	Read-only
		Order Creation Status	Read-only
		External Unique Id	Read-only
		Shipping Address	Required
		Billing Address	Optional
		Order Status	Read-only
		Order Type	Required
		Order Sub Type	Required
		Order Integration Message	Optional
		Additional Information	
		Owner	Read-only
		Description	Optional
Order Item	LS Order Item Page Layout	**Key Order Item Information**	
		Order Item Number	Read-Only
		Currency	Optional
		Product	Required
		Quantity	Required
		Order	Read-Only
		Additional Information	
		Created: Date	Read-Only
		Modified: Date	Read-Only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Sample Inventory	LS Sample Inventory Page Layout	**Key Inventory Information**	
		Sample	Required
		Lot Number (#)	Optional
		Opening Balance	Required
		Last Physical Count	Read-only
		Physical Count	Optional
		Difference	Read-only
		Lot Number: Expiration Date	Read-only
		Lot Number: CutOffDate	Read-only
		Created	Read-only
		Modified	Read-only
Sample Lot	LS Sample Lot Page Layout	**Key Lot Information**	
		Lot Number	Required
		Sample	Required
		Start Date	Optional
		Expiration Date	Required
		Short Days	Optional
		Cut Off Date	Read-Only
		Status	Read-only
		Inventory by Lot	Optional
		Sample Part Number	Read-only
		Created	Read-only
		Modified	Read-only
		Orderable	Required
		Description	
		Owner	Required
		Description	Optional

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Sample Request	LS Sample Request Page Layout	**Key Sample Request Information**	
		Order Number	Read-Only
		Order Created	Read-Only
		Additional Information	
		Owner	Read-Only
		Created	Read-Only
		Description	Optional
		Modified	Read-Only
Sample Request Item	LS Sample Request Item Page Layout	**Key Sample Request Item Information**	
		Order Item Number	Read-Only
		Currency	Optional
		Product	Required
		Quantity	Required
		Order	Required
		Additional Information	
		Created: Date	Read-Only
		Modified: Date	Read-Only

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Sample Transaction	LS Sample Transaction Page Layout	**Key Transaction Information**	
		Name	Read-only
		Date	Required
		Type	Required
		Status	Read-only
		Expected Delivery Date	Optional
		Tracking Number (#)	Optional
		Number (#) of Packages Sent	Optional
		Transfer To	Optional
		Transfer From	Read-only
		Inventory Period: Start Date	Read-only
		Inventory Period: End Date	Read-only
		Adjustment Reasons	Optional
		Comments	Optional

Table 3. Field Setup and Layout for LS Field Sales Rep Role Custom Page Layouts

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Solution	LS Solution Page Layout	**Solution Detail Information**	
		Solution ID	Read-only
		Title	Required
		Status	Optional
		Solution Currency	Optional
		Published	Optional
		Solution Rating	Read-only
		Created External	Read-only
		Modified External	Read-only
		Additional Information	
		Expiration Date	Optional
		Number of Ratings	Read-only
		PCD Attainment Type	Optional
		Related Thumbnail Image	Optional
		Release Date	Optional
		Verification Status	Optional
		Legal Approval	Optional
		Marketing Approval	Optional
		Multi-file Asset	Optional
Transaction Item	LS Transaction Item Page Layout	**Key Transaction Item Information**	
		Line Number	Required
		Sample	Required
		Lot Number	Optional
		Quantity	Required
		Shipped Quantity	Optional
		Transaction Number	Required
		Owner	Owner

Related Information Sections for the LS Field Sales Rep Role Page Layouts

Table 4 shows the related information sections, specific to life sciences, that company administrators make available (that is, move to the Displayed Information section) in the custom page layouts that support the LS Field Sales Rep role. Other general information sections (such as Campaigns, Leads, Opportunities, and Contacts), which are relevant to all industry editions, must also be made available.

For information about the steps involved in configuring page layouts, see "Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition" on page 21.

Table 4. Related Information Sections for the LS Field Sales Rep Role Page Layouts

Record Type	Page Layout	Displayed Information
Account	LS Account Page Layout	Account Relationship
		Account Team
		Account Survey
		Addresses
		Calls
		Contacts
		Objectives
		Plan Accounts
		Revenues
Activity	LS Account Call Page Layout **NOTE:** It is recommended that you display Attendee Call instead of Contacts (but not both) on the LS Account Call Page. It is recommended that you display either Available Products for Detailing or Products Detailed, either Available Promotional Items for Drop or Promotional Items, and either Available Samples for Drop or Samples Dropped (each pair of applets contains similar information), but you can display all six applets if required and in any combination.	Activity Assessment
		Attendee Call or Contacts
		Available Message Plans
		Available Products for Detailing *or* Products Detailed
		Available Promotional Items for Drop *or* Promotional Items
		Available Samples for Drop *or* Samples Dropped
		Contacts
		Message Responses
		Sample Requests
		Sample Transactions
		Signature
		Solutions

Table 4. Related Information Sections for the LS Field Sales Rep Role Page Layouts

Record Type	Page Layout	Displayed Information
Activity	LS Contact Call Page Layout **NOTE:** It is recommended that you display either Available Products for Detailing or Products Detailed, either Available Promotional Items for Drop or Promotional Items, and either Available Samples for Drop or Samples Dropped (each pair of applets contains similar information), but you can display all six applets if required and in any combination.	Activity Assessment
		Available Message Plans
		Available Products for Detailing *or* Products Detailed
		Available Promotional Items for Drop *or* Promotional Items
		Available Samples for Drop *or* Samples Dropped
		Contacts
		Message Responses
		Sample Requests
		Sample Transactions
		Signature
		Solutions
Activity	LS Attendee Call Page Layout **NOTE:** It is recommended that you display either Available Products for Detailing or Products Detailed, either Available Promotional Items for Drop or Promotional Items, and either Available Samples for Drop or Samples Dropped (each pair of applets contains similar information), but you can display all six applets if required and in any combination.	Activity Assessment
		Available Message Plans
		Available Products for Detailing *or* Products Detailed
		Available Promotional Items for Drop *or* Promotional Items
		Available Samples for Drop *or* Samples Dropped
		Contacts
		Message Responses
		Sample Requests
		Sample Transactions
		Signature
		Solutions
Activity	LS Smart Call Page Layout	Products Details
		Promotional Items
		Samples Dropped

Table 4. Related Information Sections for the LS Field Sales Rep Role Page Layouts

Record Type	Page Layout	Displayed Information
Allocation	LS Allocation Page Layout	Books
		Custom Objects 01-15 (as required)
Business Plan	LS Business Plan Page Layout	Activities
		Books
		Business Plan
		Business Plan Assessment
		Business Plan Teams
		Objective
		Plan Account
		Plan Contact
		Plan Opportunity
Contact	LS Contact Page Layout	Accounts
		Addresses
		Calls
		Contact Best Times
		Contact Relationships
		Contact State Licenses
		Contact Team
		MedEd Event
		Message Responses
		Objectives
		Plan Contacts
		Blocked Products
		Referrals
		Revenues
		Signature

Table 4. Related Information Sections for the LS Field Sales Rep Role Page Layouts

Record Type	Page Layout	Displayed Information
Inventory Period	LS Inventory Period Page Layout	Books
		Custom Objects 01-15 (as required)
		Inventory Audit Reports
		Sample Inventory
		Sample Transactions
MedEd Event	LS MedEd Event Page Layout	Books
		Completed Activities
		Custom Objects 01-15 (as required)
		Invitees
		Open Activities
MedEd Event	LS MedEd Invitee Page Layout	Custom Objects 01-15 (as required)
Messaging Plan	LS Messaging Plan Page Layout	Books
		Message Responses
		Messaging Plan Items
Objective	LS Objective Page Layout	Activities
		Books
		Objective
		Objective Assessment
		Objective Team
		Opportunities
Order	LS Order Page Layout	Order Items
		Custom Objects 01-40 (as required)
SampleInventory	LS Sample Inventory Page Layout	Custom Objects 01-15 (as required)
Sample Lot	LS Sample Lot Page Layout	Books
		Custom Objects 01-15 (as required)

Table 4. Related Information Sections for the LS Field Sales Rep Role Page Layouts

Record Type	Page Layout	Displayed Information
Sample Transaction	LS Sample Transaction Page Layout	Books
		Custom Objects 01-15 (as required)
		Transactions Items
Solution	LS Solution Page Layout **NOTE:** Make sure that Service Requests is removed from Displayed Information.	Books
		Messaging Plans
		Messaging Plan Items
		Messaging Plan Item Relations
		Related Solutions
Transaction Item	LS Transaction Item Page Layout	Custom Objects 01-15 (as required)

4 Setting Up Access Profiles for Oracle CRM On Demand Life Sciences Edition

This chapter describes how to set up a typical role in Oracle CRM On Demand Life Sciences Edition, and access profiles for life sciences roles. It includes the following topics:

Setting Up Access Profiles for Life Sciences Roles

You must set up two access profiles for each life sciences role:

- **Default access profile.** Sets the access levels for records that are 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 Life Sciences Edition" on page 16.

To set up the default access and owner access profiles for a life sciences role

1. In Oracle CRM On Demand, click the Admin link, and navigate to User Management and Access Controls, then 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 (for example, LS Administrator Default Access Profile), which is similar to the one you want to set up.
   - If you are setting up an owner access profile, click the Copy link on an owner access profile (for example, LS Administrator Owner Access Profile), which is similar to the one you want to set up.

   For information about typical access profiles for the LS Field Sales Rep role, see "Access Profiles for the LS Field Sales Rep Role" on page 50.
3. In Step 1 (Access Profile Name) of the Access Profile wizard, do the following:
   a. Enter a name for the access profile.

      For example, enter LS Field Sales Rep Default Access Profile or LS Field Sales Rep Owner Access Profile.

b If required, select the Grantable to Team Members check box.

If you select this check box, then the access profile settings for each life sciences role must be configured with child access as shown in Table 6 on page 51 and Table 7 on page 52.

4 In Step 2 (Specify Access Levels) of the Access Profile wizard, change the access settings for the top-level profile and the related information settings for the life sciences role, as necessary.

For information about typical access settings for the LS Field Sales Rep role, see "Access Levels for the LS Field Sales Rep Role" on page 51.

5 Click Finish.

Access Profile Settings for the LS Field Sales Rep Role

This topic shows the access profile settings or access levels that are suggested for the LS Field Sales Rep role. These access profile settings must be used in every access profile for a life sciences role, especially for access profiles that have the Grantable to Team Members check box selected.

This topic contains the following information:

- "Access Profiles for the LS Field Sales Rep Role" on page 50
- "Access Levels for the LS Field Sales Rep Role" on page 51

For information about the steps involved in setting up a default access and owner access profile for a life sciences role, see "Setting Up Access Profiles for Life Sciences Roles" on page 49.

Access Profiles for the LS Field Sales Rep Role

For the LS Field Sales Rep role, you create a copy of the access profiles used for the life sciences administrator role. Table 5 shows the names of the access profiles that life sciences administrators configure for the LS Field Sales Rep role. For information about the steps involved in setting up a default access or owner access profile for a life sciences role, see "Setting Up Access Profiles for Life Sciences Roles" on page 49.

Table 5. Access Profiles for the LS Field Sales Rep Role

Copy	Name of New Access Profile
LS Administrator Default Access Profile	LS Field Sales Rep Default Access Profile
LS Administrator Owner Access Profile	LS Field Sales Rep Owner Access Profile

Access Levels for the LS Field Sales Rep Role

Table 6 shows the access levels for the top-level profile that life sciences administrators configure for the LS Field Sales Rep role. For example, specify Read-only as the default access level and as the Owner Access level for the Allocation record type.

NOTE: All access profiles that are *Grantable to Team Members* (that is, have the Grantable to Team Members check box selected), must be configured with the top-level profile and child access level settings shown in Table 6 on page 51 and Table 7 on page 52 respectively.

For information about the steps involved in setting up a default access or owner access profile for a life sciences role, see "Setting Up Access Profiles for Life Sciences Roles" on page 49.

Table 6. Access Levels for Top-Level Profile for the LS Field Sales Rep Role

Record Type	Default Access	Owner Access
Account	Read-only	Read, Edit, or Delete
Activity	Read-only	Read, Edit, or Delete
Allocation	Read-only	Read, Edit, or Delete
Business Plan	Read-only	Read, Edit, or Delete
Blocked Products	Read-only	Read-only
Campaign	Read-only	Read, Edit, or Delete
Contact	Read-only	Read, Edit, or Delete
Contact State License	Read-only	Read, Edit, or Delete
Forecast	Read-only	Read, Edit, or Delete
Inventory Audit Report	Read-only	Read or Edit
Inventory Period	Read-only	Read or Edit
MedEd Event	Read-only	Read, Edit, or Delete
Messaging Plan	Read-only	Read-only
Messaging Plan Item	Read-only	Read-only
Messaging Plan Item Relations	Read-only	Read-only
Message Response	Read-only	Read, Edit, or Delete
Objective	Read-only	Read, Edit, or Delete
Opportunity	Read-only	Read, Edit, or Delete
Order	Read-only	Read, Edit, or Delete
Order Item	Read-only	Read, Edit, or Delete
Period	Read-only	Read-only
Plan Account	Read-only	Read, Edit, or Delete

Table 6. Access Levels for Top-Level Profile for the LS Field Sales Rep Role

Record Type	Default Access	Owner Access
Plan Contact	Read-only	Read, Edit, or Delete
Plan Opportunity	Read-only	Read, Edit, or Delete
Sample Disclaimer	Read-only	Read-only
Sample Inventory	Read-only	Read, Edit, or Delete
Sample Lot	Read-only	Read-only
Sample Request	Read-only	Read, Edit, or Delete
Sample Request Item	Read-only	Read, Edit, or Delete
Sample Transaction	Read-only	Read, Edit, or Delete
Signature	Read-only	Read-only
Smart Call	Read-only	Read, Edit, or Delete
Solution	Read-only	Read-only
Transaction Item	Read-only	Read, Edit, or Delete

To set the access levels for the related items, click the Related Information link next to a record type. Table 7 shows the access levels for the related information items that life sciences administrators configure for the LS Field Sales Rep role. For information about the steps involved in setting up a default access or owner access profile for a life sciences role, see "Setting Up Access Profiles for Life Sciences Roles" on page 49.

Table 7. Access Levels for Related Information for the LS Field Sales Rep Role

Record Type	Related Information	Default Access	Owner Access
Account	Account Relationships	Full	Full
	Account Survey	Read-only	Full
	Account Team	Full	Full
	Addresses	Full	Full
	Calls	View	View
	Contacts	View	View
	Objectives	View	View
	Plan Accounts	Full	View
	Revenues	Read-only	Read-only
Allocation	Books	Read-Only	Full
	Custom Objects 01-15	Read-Only	Full

Table 7. Access Levels for Related Information for the LS Field Sales Rep Role

Record Type	Related Information	Default Access	Owner Access
Activity	Activity Assessment	Read-Only	Full
	Available Message Plans	Read-Only	Full
	Available Products for Detailing	Read-only	Full
	Available Promotional Items for Drop	Read-only	Full
	Available Samples for Drop	Read-only	Full
	Message Responses	View	View
	Product Detailed	Read-only	Full
	Promotional Items Dropped	Read-only	Full
	Samples Dropped	Read-only	Full
	Sample Transactions	View	View
	Signature	Read-only	Full
	Solutions	View	View
Business Plan	Activities	Inherit Primary	Inherit Primary
	Books	Read-Only	Full
	Business Plan Teams	Read-only	Full
	Business Plans	View	View
	Business Plans Assessments	Read-only	Full
	Objectives	Inherit Primary	Inherit Primary
	Plan Accounts	Inherit Primary	Inherit Primary
	Plan Contacts	Inherit Primary	Inherit Primary
	Plan Opportunities	Inherit Primary	Inherit Primary

Table 7. Access Levels for Related Information for the LS Field Sales Rep Role

Record Type	Related Information	Default Access	Owner Access
Contact	Accounts	View	View
	Addresses	Read-only	Full
	Blocked Products	Read-only	Read-only
	Calls	View	View
	Contact Best Times	Read-only	Full
	Contact Relationships	Read-only	Full
	Contact State Licenses	View	View
	Contact Team	Read-only	Full
	MedEd Event	Read-only	Read-only
	Objectives	View	View
	Plan Contacts	Read-only	Full
	Referrals	No Access	No Access
	Revenues	No Access	No Access
	Signature	No Access	No Access
Inventory Audit Report	Books	Read-only	Full
	Sample Inventory	Read-Only	Full
Inventory Period	Books	Read-Only	Full
	Custom Objects 01-15	Read-Only	Full
	Inventory Audit Reports	View	View
	Sample Inventory	Read-Only	Full
	Sample Transactions	View	View
MedEd Event	Books	Full	Full
	Completed Activities	View	View
	Custom Objects 01-15	Read-Only	Full
	Invitees	Full	Full
	Open Activities	View	View
MedEd Invitee	Custom Objects 01-15	Read-Only	Full
Messaging Plan	Books	Read-only	Read-only
	Message Responses	View	View
	Messaging Plan Items	Inherit Primary	Full

Table 7. Access Levels for Related Information for the LS Field Sales Rep Role

Record Type	Related Information	Default Access	Owner Access
Messaging Plan Item	Message Responses	View	View
	Messaging Plan Item Relations	Read-only	Full
Objective	Activities	Inherit Primary	Inherit Primary
	Books	Read-Only	Full
	Objective Teams	Read-only	Full
	Objectives	Inherit Primary	View
	Objective Assessments	Read-Only	Full
	Opportunities	Inherit Primary	Inherit Primary
Opportunity	Plan Opportunities	Read-only	Full
Order	Order Items	Read-Only	Full
	Custom Objects 01-40	Read-Only	Full
Order Item	Custom Objects 01-40	Read-Only	Full
Period	Business Plans	View	View
	Messaging Plans	View	View
	Objectives	View	View
Sample Inventory	Custom Objects 01-15	Read-Only	Full
Sample Lot	Books	Read-Only	Full
	Custom Objects 01-15	Read-Only	Full
Sample Transaction	Books	Read-Only	Full
	Custom Objects 01-15	Read-Only	Full
	Transaction Items	Inherit Primary	Inherit Primary
Smart Call	Books	Read-only	Read, Edit, or Delete
	Products Detailed	Read-only	Read or Create
	Promotional Items Dropped	Read-only	Read or Create
	Samples Dropped	Read-only	Read or Create

Table 7. Access Levels for Related Information for the LS Field Sales Rep Role

Record Type	Related Information	Default Access	Owner Access
Solution	Books	View	Full
	Messaging Plans	View	View
	Messaging Plan Items	View	Full
	Messaging Plan Item Relations	View	Full
	Related Solutions	Read-only	View
	Solution Product	View	View
Transaction Item	Custom Objects 01-15	Read-Only	Full

Creating Life Sciences Roles

Complete the steps in the following procedure to create a life sciences role. This task is a step in "Process of Configuring Oracle CRM On Demand Life Sciences Edition" on page 16.

To create a life sciences role

1. In Oracle CRM On Demand, click the Admin link, and navigate to User Management and Access Controls, then 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 LS Field Sales Rep role, copy the life sciences administrator role. The Role Management wizard opens.
3. In Step 1 of the wizard, enter the role name (for example, LS Field Sales Rep) and description.
4. In the wizard, go to Step 2 (Record Type Access), and adjust the settings for the role, as necessary.

   For information about the record type access settings for the LS Field Sales Rep role, see "Record Type Access for the LS Field Sales Rep Role" on page 57.
5. In the wizard, go to Step 3 (Access Profiles), and select the access profiles that you created earlier for the life sciences role.
6. In the wizard, go to Step 4 (Privileges), and adjust the settings for the role, as necessary.

   For information about privilege settings for the LS Field Sales Rep role, see "Privileges for the LS Field Sales Rep Role" on page 59.
7. In the wizard, go to Step 5 (Tab Access & Order), and adjust the settings for the role, as necessary.

   For information about tab settings for the LS Field Sales Rep role, see "Tab Access and Order for the LS Field Sales Rep Role" on page 60.

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

For information about page layout assignment for the LS Field Sales Rep role, see "Page Layout Assignment for the LS Field Sales Rep Role" on page 61.

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

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

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

11 Click Finish.

Role Settings for the LS Field Sales Rep Role

This topic describes the typical role settings for the LS Field Sales Rep role. It contains the following information:

Record Type Access for the LS Field Sales Rep Role

Table 8 shows the record type access that life sciences administrators configure for the LS Field Sales Rep role. For example, select the Has Access and Can Create check boxes for the Account record type, but do not select the Can Read All Records check box. For information about the steps involved in creating a life sciences role, see "Creating Life Sciences Roles" on page 56.

Table 8. Record Type Access for the LS Field Sales Rep Role

Record Type	Has Access	Can Create	Can Read All Records
Account	Selected	Selected	Not selected
Activity	Selected	Selected	Not selected
Allocation	Selected	Not selected	Not selected
Blocked Products	Selected	Not selected	Not selected
Book	Selected	Not selected	Not selected

Table 8. Record Type Access for the LS Field Sales Rep Role

Record Type	Has Access	Can Create	Can Read All Records
Business Plan	Selected	Selected	Not selected
Campaign	Selected	Selected	Not selected
Contact	Selected	Selected	Not selected
Contact State License	Selected	Selected	Selected
Custom Object 01-15	Selected (for custom objects as needed)	Selected (for custom objects as needed)	Selected (for custom objects as needed)
Forecast	Selected	Selected	Not selected
Inventory Audit Report	Selected	Selected	Not selected
Inventory Period	Selected	Selected	Not selected
MedEd Event	Selected	Selected	Not selected
Message Response	Selected	Selected	Not selected
Messaging Plan	Selected	Not selected	Not selected
Messaging Plan Item	Selected	Not selected	Selected
Messaging Plan Item Relations	Selected	Not selected	Selected
Objective	Selected	Selected	Not selected
Order	Selected	Selected	Not Selected
Order Item	Selected	Selected	Not Selected
Period	Selected	Not selected	Selected
Plan Accounts	Selected	Selected	Selected
Plan Contact	Selected	Selected	Selected
Plan Opportunity	Selected	Selected	Selected
Sample Disclaimer	Selected	Not selected	Selected
Sample Inventory	Selected	Selected	Not selected
Sample Lot	Selected	Not selected	Selected
Sample Request	Selected	Selected	Not Selected
Sample Request Item	Selected	Selected	Not Selected
Sample Transaction	Selected	Selected	Not selected
Signature	Selected	Selected	Not selected
Smart Call	Selected	Selected	Selected

Table 8. Record Type Access for the LS Field Sales Rep Role

Record Type	Has Access	Can Create	Can Read All Records
Solution	Selected	Not selected	Not selected
Transaction Item	Selected	Selected	Not selected

Privileges for the LS Field Sales Rep Role

Table 9 shows the privilege settings that life sciences administrators configure for the LS Field Sales Rep role. For example, assign the Enable Basic Samples Operation privilege in the Industry Specific: Life Sciences category (that is, select the Assign check box) for the LS Field Sales Rep Role. For information about the steps involved in creating a life sciences role, see "Creating Life Sciences Roles" on page 56.

Table 9. Privileges for the LS Field Sales Rep Role

Category	Privilege	Assign
CRM: Sales	Manage Business Planning Access	Selected
CRM: Sales	Enable Order Access **NOTE:** If you cannot see this privilege, contact Customer Care and ask them to turn on this privilege for you.	Selected
Industry Specific: Life Sciences	Calls: Calendar Planned Calls	Selected
Industry Specific: Life Sciences	Calls: Enable Call Detailing	Selected
Industry Specific: Life Sciences	Enable Basic Samples Operation	Selected
Industry Specific: Life Sciences	Enable Samples Adjustment	Selected
Industry Specific: Life Sciences	Manage MedEd Events Access	Selected
Industry Specific: Life Sciences	Manage Personalized Content Delivery (PCD)	Selected
Industry Specific: Life Sciences	Manage Pharmaceutical Access	Selected
Customization: Data	Customize Application - Manage Custom Object 01	Selected
Customization: Data	Customize Application - Manage Custom Object 02	Selected
Customization: Data	Customize Application - Manage Custom Object 03	Selected
Customization: Data	Customize Application - Manage Custom Object 04-10	Selected

Table 9. Privileges for the LS Field Sales Rep Role

Category	Privilege	Assign
Customization: Data	Customize Application - Manage Custom Object 11-15	Selected
Customization: Data	Customize Application - Manage Custom Object 16-20	Selected
Customization: Data	Customize Application - Manage Custom Object 21-25	Selected
Customization: Data	Customize Application - Manage Custom Object 26-30	Selected
Customization: Data	Customize Application - Manage Custom Object 31-35	Selected
Customization: Data	Customize Application - Manage Custom Object 36-40	Selected

Tab Access and Order for the LS Field Sales Rep Role

Table 10 shows the tab access and order settings that life sciences administrators configure for the LS Field Sales Rep roles. For example, move Allocations to Selected Tabs, Contact State License to Available Tabs, Messaging Plan Item to Not Available Tab, and so on. Use the up and down arrows to order your tabs in the Selected Tabs box. For information about the steps involved in creating a life sciences role, see "Creating Life Sciences Roles" on page 56.

Table 10. Tab Access and Order for the LS Field Sales Rep Role

Tab	Move To
Allocations	Selected Tabs
Business Plan	Selected Tabs
Contact State License	Available Tabs
Custom Object 01-15 (as required)	Available Tabs
Inventory Periods	Selected Tabs
MedEd Event	Selected Tabs
Messaging Plan	Selected Tabs
Messaging Plan Item	Not Available Tab
Messaging Plan Item Relations	Not Available Tab
Objective	Selected Tabs
Order	Selected Tab
Order Item	Not Available Tab

Table 10. Tab Access and Order for the LS Field Sales Rep Role

Tab	Move To
Plan Account	Not Available Tab
Plan Contact	Not Available Tab
Plan Opportunity	Not Available Tab
Sample Disclaimer	Selected Tabs
Sample Inventory	Selected Tabs
Sample Lot	Not Available Tab
Sample Request	Selected Tab
Sample Request Item	Not Available Tab
Sample Transaction	Selected Tabs
Transaction Item	Not Available Tab

Page Layout Assignment for the LS Field Sales Rep Role

Table 11 shows the page layout assignment that life sciences administrators configure for the LS Field Sales Rep roles. For example, select LS Account Page Layout for the Account record type, LS Account Call Page for the Account Call record type, and so on. For information about the steps involved in creating a life sciences role, see "Creating Life Sciences Roles" on page 56.

Table 11. Page Layout Assignment for the LS Field Sales Rep Role

Record Type	Page Layout Name
Account	LS Account Page Layout
	LS Account Relationship Page Layout
	LS Account Contact Page Layout
Account Call (Activity record type)	LS Account Call Page Layout
Allocation	Allocation Page Standard Layout
Attendee Call	LS Attendee Call Page Layout
Business Plan	LS Business Plan Page Layout
Contact	LS Contact Page Layout
	LS Contact Relationship Page Layout
Contact Best Time	Contact Best Time Page Standard Layout
Contact Call (Activity record type)	LS Contact Call Page Layout
Contact State License	Contact State License Page Standard Layout

Table 11. Page Layout Assignment for the LS Field Sales Rep Role

Record Type	Page Layout Name
Inventory Audit Report	Inventory Audit Report Page Standard Layout
Inventory Period	LS Inventory Period Page Layout
MedEd Event	LS MedEd Event Page Layout
MedEd Invitee	LS MedEd Invitee Page Layout
Messaging Plan	LS Messaging Plan Page Layout
Messaging Plan Item	Messaging Plan Item Page Standard Layout
Messaging Plan Item Relations	Messaging Plan Item Relations Page Standard Layout
Message Response	LS Message Response Page Layout
Objective	LS Objective Page Layout
Order	LS Order Page Layout
Order Item	LS Order Item Page Layout
Plan Accounts	Plan Account Page Standard Layout
Plan Contact	Plan Contact Page Standard Layout
Plan Opportunity	Plan Opportunity Page Standard Layout
Sample Disclaimer	Sample Disclaimer Page Standard Layout
Sample Inventory	LS Sample Inventory Page Standard Layout
Sample Lot	LS Sample Lot Page Standard Layout
Sample Request	LS Sample Request Page Layout
Sample Request Item	LS Sample Request Item Page Layout
Sample Transaction	LS Sample Transaction Page Layout
Signature	Signature Page Standard Layout
Smart Call (Activity record type)	LS Smart Call Page Layout
Solution	LS Solution Page Layout
Transaction Item	LS Transaction Item Page Standard Layout

5 Setting Up a Business Process to Lock Records for Oracle CRM On Demand Life Sciences Edition

This chapter describes how to set up a business process to lock records in Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition

A number of record types can be locked in Oracle CRM On Demand Life Sciences Edition. This task is a step in "Process of Configuring Oracle CRM On Demand Life Sciences Edition" on page 16.

To set up a business process to lock records in Oracle CRM On Demand Life Sciences Edition

1. Ask your company administrator to enable the Process Administration privilege for your role, as shown in the following table.

   This privilege allows you to define role-based business processes with conditional state transitions and dynamic access controls.

Category	Privilege	Assign
Customization: Business Rules	Process Administration	Selected

   It is recommended that only Oracle CRM On Demand administrators have the authority to create, edit, and delete business rules. Sales representatives must not have this privilege enabled.

2. Create a business process to lock records for each life sciences record type that you want to lock.

   Each business process must define the primary values, transition states, and field setup for the record type as required. See the following topics for more information:

- "Creating a Business Process to Lock Call Activity Records" on page 64
- "Creating a Business Process to Lock Sample Transaction Records" on page 68
- "Creating a Business Process to Lock Messaging Plan Records" on page 71
- "Creating a Business Process to Lock Solution Records" on page 72
- "Creating a Business Process to Lock Validated Address Records" on page 75 "Creating a Business Process to Lock Records in General" on page 76

  This business process applies to the following record types: Account, Business Plan, Contact, Lead, Objective, Opportunity, and Service Request.

3. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Creating a Business Process to Lock Call Activity Records

You can create a business process to lock call activity records (of type Account Call, Attendee Call, and Professional Call) so that when the status of the call activity changes to a given value, the call activity record and all associated child records (Sample Dropped, Products Detailed, and Promotional Items Dropped) are locked; that is, you cannot delete or modify them.

The following conditions apply to Account, Attendee, and Professional (Contact) Call activity record types:

- When the call activity status is set to In Progress, you can add, update, and delete records of the type Samples Dropped, Products Detailed, and Promotional Items Dropped to the call activity.
- When the call activity status is set to Signed or Submitted, you cannot add, update, or delete records of the type Samples Dropped, Products Detailed, or Promotional Items Dropped to the call activity.
- When the call activity status is set to Signed, you cannot delete the call activity record or update the following fields in the call activity record because they are locked: Primary Contact, Account, Start Time, Duration, and End Time.

Use the following procedure to create a business process to lock call activity records in Oracle CRM On Demand Life Sciences Edition that satisfy these conditions. This task is a step in "Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition" on page 63.

NOTE: This procedure is for illustrative purposes only; configuring a business process to lock call activity records will vary according to Oracle CRM On Demand installation and is dependent on the customer's business rules for locking data.

To create a business process to lock call activity records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and navigate to Process Administration.
2. Click New on the Process List page and on the Process Edit page:

a. Enter a name for the process in the Process Name field, for example, *Locking a Call Activity Record*.

b. In the Object Name field, select Activity from the menu.

   The Primary Field automatically displays *Call Type* by default.

   The Transition field automatically displays *Status* by default.

c. (Optional) In the Description field, enter a description of the business process.

d. Click Save.

3. On the Process List page, open the business process (Locking a Call Activity Record) that you just created.

4. On the Process Detail page, click Add in the Primary Values section, add the Account Call, Attendee Call, and Professional Call primary values, then click Save.

5. On the Process Detail page, click Add in the Transition States section, and set up the transition states shown in the following table for the activity process:

State	Disable Update Check Box	Disable Delete or Remove Check Box
Not Started	Not selected	Not selected
In Progress	Not selected	Not selected
Planned	Not selected	Not selected
Completed	Not selected	Selected
Submitted	Selected	Selected
Signed	Selected	Selected
Deferred	Not selected	Selected

6. On the Process Detail page in the Transition States section, configure the transition states:

a. Open the transition state.

b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

   For example:

   - For the Not Started and In Progress transition states, all fields must be available for update so do not select read-only for any fields.
   - For the Completed transition state, select read-only for some fields but not for fields that must be available for update.
   - For the Submitted transition state, all fields must be locked so select read-only for all fields that you add.

c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as shown in the following table:

State	Record Type	Disable Create or Add Check Box	Disable Update Check Box	Disable Delete or Remove Check Box
■ Not Started	Attachments	Not selected	Not selected	Not selected
■ In Progress	Books	Not selected	Not selected	Not selected
	Contacts	Not selected	Not selected	Not selected
	Custom Objects 1-3	Not selected	Not selected	Not selected
	Message Responses	Not selected	Not selected	Not selected
	Products Detailed	Not selected	Not selected	Not selected
	Promotional Items Dropped	Not selected	Not selected	Not selected
	Samples Dropped	Not selected	Not selected	Not selected
	Sample Transactions	Not selected	Not selected	Not selected
	Signatures	Not selected	Not selected	Not selected
	Solutions	Not selected	Not selected	Not selected
■ Completed	Attachments	Not selected	Not selected	Selected
■ Deferred	Books	Not selected	Not selected	Selected
	Contacts	Not selected	Not selected	Selected
	Custom Objects 1-3	Not selected	Not selected	Selected
	Message Responses	Not selected	Not selected	Selected
	Products Detailed	Not selected	Not selected	Selected
	Promotional Items Dropped	Not selected	Not selected	Selected
	Samples Dropped	Not selected	Not selected	Selected
	Sample Transactions	Not selected	Not selected	Selected
	Signatures	Not selected	Not selected	Selected
	Solutions	Not selected	Not selected	Selected

State	Record Type	Disable Create or Add Check Box	Disable Update Check Box	Disable Delete or Remove Check Box
■ Submitted	Attachments	Selected	Selected	Selected
■ Signed	Books	Selected	Selected	Selected
	Contacts	Selected	Selected	Selected
	Custom Objects 1-3	Selected	Selected	Selected
	Message Responses	Selected	Selected	Selected
	Products Detailed	Selected	Selected	Selected
	Promotional Items Dropped	Selected	Selected	Selected
	Samples Dropped	Selected	Selected	Selected
	Sample Transactions	Selected	Selected	Selected
	Signatures	Selected	Selected	Selected
	Solutions	Selected	Selected	Selected

d Click Save.

7 Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Call Activity Record State Stage Definitions

Table 12 describes the state stages for a call activity record of type account, attendee, or professional call.

Table 12. Record State Stage Definitions for Account Call, Attendee Call, or Professional Call

State Stage	Description
In Progress	All newly created account or professional call activity records have a status of In Progress.
Planned	Newly created professional, attendee, or account calls which are auto-created have a status of Planned initially.
Completed	This means that the professional, attendee, or account call was completed, but all details have not been entered into Oracle CRM On Demand yet.
Submitted	When an account or professional call is submitted (by clicking the Submit button), its status changes to Submitted. At this point, the call is locked and no modifications can be made to the record.
Signed	This means that the account or professional call was completed and a signature acquired. At this point, the record is locked and no changes can be made to it.
Deferred	A planned account or professional call can be rescheduled or deferred.

Creating a Business Process to Lock Sample Transaction Records

You can configure a business process to lock sample transaction records so that after a sample transaction is submitted, it cannot be modified. The following conditions apply:

- When the transaction status is set to Submitted, Processed, or Processed with Discrepancies, you cannot edit any of the fields in the record because they are read-only (except for Comments), and you cannot delete the transaction record.
- When the transaction status is set to In Transit, you cannot edit any of the fields in the record because they are read-only (except for the Comments and Date fields), and you cannot delete the transaction record. You can edit the Comments field after a transaction is submitted.

NOTE: If you want to change a sample transaction that has already been submitted, then you must create a new sample transaction of the type Inventory Adjustment.

Use the following procedure to create a business process to lock sample transaction records in Oracle CRM On Demand Life Sciences Edition that satisfy these conditions. This task is a step in "Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition" on page 63.

NOTE: This procedure is for illustrative purposes only; configuring a business process to lock sample transactions will vary according to Oracle CRM On Demand installation and is dependent on the customer's business rules for locking data.

To create a business process to lock sample transaction records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and navigate to Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, *Locking a Sample Transaction Record*.
   b. In the Object Name field, select Sample Transaction from the menu.

      The Transition field automatically displays *Status* by default.
   c. (Optional) In the Description field, enter a description of the business process.
   d. Click Save.
3. On the Process List page, open the business process (Locking a Sample Transaction Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as shown in the following table:

State	Disable Update Check Box	Disable Delete or Remove Check Box
Submitted	Selected	Selected
In Transit	Not selected	Selected
Processed	Selected	Selected
Processed with Discrepancies	Selected	Selected
Adjusted	Selected	Selected

5 On the Process Detail page in the Transition States section, configure the transition states:

a Open the transition state.

b On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

For example:

- For the Submitted, Processed, and Processed with Discrepancies transition states, select read-only for all fields except the Comments field.
- For the In Transit transition state, select read-only for all fields except the Comments and Date fields.

c On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as shown in the following table:

State	Record Type	Disable Create or Add Check Box	Disable Update Check Box	Disable Delete or Remove Check Box
Submitted	Transaction Items	Selected	Selected	Selected
In Transit	Transaction Items	Selected	Not selected	Selected
Processed	Transaction Items	Selected	Selected	Selected
Processed with Discrepancies	Transaction Items	Selected	Selected	Selected
Adjusted	Transaction Items	Selected	Selected	Selected

d Click Save.

6 Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Sample Transaction Record State Stage Definitions

Table 13 describes the state stages for a sample transaction record.

Table 13. Record State Stage Definitions for a Sample Transaction

State Stage	Description
In Progress	When you create a professional call or an account call, its state is initially set to In Progress.
Submitted	The sample transaction is submitted. For example, you can submit a sample transaction of the type Transfer Out or Return.
InTransit	The sample transaction is in transit mode. For example, when you submit a sample transaction of the type Transfer Out or Return, its status changes to Submitted, and Oracle CRM On Demand automatically creates a new recipient transaction record of the type Transfer In with a status of In Transit.
Processed	The sample transaction is processed without any discrepancies. For example, when you acknowledge the full receipt of a samples transfer, the status of the sample transaction changes to Processed. For more information about acknowledging full receipt of a samples transfer, see *Oracle CRM On Demand Online Help*.
Processed With Discrepancies	The sample transaction is processed with discrepancies. For example, when you acknowledge the partial receipt of a samples transfer, the status of the transaction changes to Processed with Discrepancies. For more information about acknowledging partial receipt of a samples transfer, see *Oracle CRM On Demand Online Help*.
Adjusted	The sample transaction has been adjusted. To resolve discrepancies between physical counts and electronic counts of the inventory, end users and samples administrators must create and submit adjustment transactions.
Rejected	The sample transaction has not been approved.

Creating a Business Process to Lock Messaging Plan Records

You can create a business process to lock messaging plan records so that when a messaging plan has been released (the status is set to Released), all fields in the messaging plan record are locked (except for Expiration Date), and you cannot edit or delete the messaging plan record.

Use the following procedure to create a business process to lock messaging plan records in Oracle CRM On Demand Life Sciences Edition that satisfy this condition. This task is a step in "Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition" on page 63.

NOTE: This procedure is for illustrative purposes only; configuring a business process to lock messaging plans will vary according to Oracle CRM On Demand installation and is dependent on the customer's business rules for locking data.

To create a business process to lock messaging plan records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and navigate to Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, *Locking a Messaging Plan Record*.
   b. In the Object Name field, select Messaging Plan from the menu.

      The Transition field automatically displays *Status* by default.
   c. (Optional) In the Description field, enter a description of the business process.
   d. Click Save.
3. On the Process List page, open the business process (Locking a Messaging Play Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition state for the business process as shown in the following table:

State	Disable Update Check Box	Disable Delete or Remove Check Box
Released	Not selected	Selected

5. On the Process Detail page in the Transition States section, configure the transition state:
   a. Open the Released transition state.
   b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

      For example, select read-only for all fields except the Expiration Date field.
   c. On the Transition State Detail page, click Add in the Related Access Control section, then add the following related access controls for the transition state:

State	Record Type	Disable Create or Add Check Box	Disable Update Check Box	Disable Delete or Remove Check Box
Released	Books	Selected	Selected	Selected
	Message Responses	Selected	Selected	Selected
	Messaging Plan Items	Selected	Selected	Selected

  d. Click Save.

6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Messaging Plan Record State Stage Definitions

Table 14 describes the state stages for a messaging plan record.

Table 14. Record State Stage Definitions for a Messaging Plan

State Stage	Description
Released	The messaging plan has been released.

Creating a Business Process to Lock Solution Records

You can create a business process to lock solution records so that when a solution has been approved by Marketing and Legal (that is, the Marketing Approval and Legal Approval check boxes are selected), all fields in the solution record are locked (except for the Expiration Date), and you cannot edit or delete the solution record.

Use the following procedure to create a business process to lock solution records in Oracle CRM On Demand Life Sciences Edition that satisfy this condition. This task is a step in "Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition" on page 63.

NOTE: This procedure is for illustrative purposes only; configuring a business process for solutions will vary according to Oracle CRM On Demand installation and is dependent on the customer's business rules for locking data.

To create a business process to lock solution records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and navigate to Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, *Locking a Solution Record*.

b In the Object Name field, select Solution from the menu.

The Transition field automatically displays *Status* by default.

c (Optional) In the Description field, enter a description of the business process.

d Click Save.

3 On the Process List page, open the business process (Locking a Solution Record) that you just created.

4 On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as shown in the following table:

State	Disable Update Check Box	Disable Delete or Remove Check Box
Approved **NOTE:** For the Approved state, add also the following status validation information in the Condition text box: [<MarketingApproval>]= ’Y’ AND [<LegalApproval>]=’Y’.	Selected	Selected
Draft	Not selected	Not selected
Obsolete	Selected	Selected

5 On the Process Detail page in the Transition States section, configure the transition states:

a Open the transition state.

b On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

For example, for the Approved state, select read-only for all fields except the Expiration Date field.

c On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as shown in the following table:

State	Record Type	Disable Create or Add Check Box	Disable Update Check Box	Disable Delete or Remove Check Box
Approved	Books	Not selected	Selected	Selected
	Messaging Plans	Not selected	Selected	Selected
	Messaging Plan Items	Not selected	Selected	Selected
	Messaging Plan Item Relations	Not selected	Selected	Selected
	Related Solutions	Not selected	Selected	Selected

State	Record Type	Disable Create or Add Check Box	Disable Update Check Box	Disable Delete or Remove Check Box
Draft	Books	Selected	Not selected	Not selected
	Messaging Plans	Selected	Not selected	Not selected
	Messaging Plan Items	Selected	Not selected	Not selected
	Messaging Plan Item Relations	Selected	Not selected	Not selected
	Related Solutions	Selected	Not selected	Not selected
Obsolete	Books	Selected	Selected	Selected
	Messaging Plans	Selected	Selected	Selected
	Messaging Plan Items	Selected	Selected	Selected
	Messaging Plan Item Relations	Selected	Selected	Selected
	Related Solutions	Selected	Selected	Selected

d Click Save.

6 Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Solution Record State Stage Definitions

Table 15 describes the state stages for a solution record.

Table 15. Record State Stage Definitions for a Solution

State Stage	Description
Approved	The proposed solution has been approved.
Draft	The proposed solution is in draft status (and has not been approved yet).
Obsolete	The proposed solution is out of date (or invalid).

Creating a Business Process to Lock Validated Address Records

You can configure a business process to lock validated address records in Oracle CRM On Demand Life Sciences Edition so that after an address record is created and validated (the Validated Date field has a date value and the Status field has a value of Validated), it cannot be modified or deleted.

Use the following procedure to create a business process to lock validated address records in Oracle CRM On Demand that satisfy this condition. This task is a step in "Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition" on page 63.

NOTE: This procedure is for illustrative purposes only; configuring a business process for addresses will vary according to Oracle CRM On Demand installation and is dependent on the customer's business rules for locking data.

Before you begin. To perform this task, your company profile must include the following settings: Enable Shared Addresses and Validate Shared Addresses. Your user role must include the following privileges: Manage Shared Addresses Access and Validate Shared Addresses.

To create a business process to lock validated address records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and navigate to Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, *Locking a Validated Address Record*.
   b. In the Object Name field, select Address from the menu.

      The Transition field automatically displays *Validated Status* by default.
   c. (Optional) In the Description field, enter a description of the business process.
   d. Click Save.
3. On the Process List page, open the business process (Locking a Validated Address Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as shown in the following table:

State	Disable Update Check Box	Disable Delete or Remove Check Box
Validated	Selected	Selected
Not Validated	Not selected	Not selected

5. On the Process Detail page in the Transition States section, configure the transition states:
   a. Open the transition state.

b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

   For example, for the Validated state, select read-only for all fields.

c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as shown in the following table:

State	Record Type	Disable Create or Add Check Box	Disable Update Check Box	Disable Delete or Remove Check Box
Validated	Audit Trail	Selected	Selected	Selected
Not Validated	Audit Trail	Not selected	Not selected	Not selected

d. Click Save.

6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Validated Address Record State Stage Definitions

Table 15 describes the state stages for a validated address record.

Table 16. Record State Stage Definitions for an Address

State Stage	Description
Validated	The address has been locked.
Not Validated	The address has not been locked.

Creating a Business Process to Lock Records in General

You can create a business process to lock the following *record types* in general in Oracle CRM On Demand Life Sciences Edition so that when the status of the record changes to a given value, the record and all associated child records are locked; that is, you cannot delete or modify them:

- Account
- Business Plan
- Contact
- Lead
- Objective
- Opportunity
- Service Request

For example, you can create conditions similar to the following to apply to these record types:

- When *record type* status is set to one of the following, you can add, update, and delete records as required: Active, Current, Qualifying, or Pending.
- When *record type* status is set to one of the following, you cannot add, update, or delete records because the records are locked: Inactive, Final Approved, Qualified, Won, or Open.
- When *record type* status is set to one of the following, you cannot delete the records or update certain fields in the record because they are locked: Closed, Submitted, Converted, or Lost.

Use the following procedure to create a business process to lock records in Oracle CRM On Demand Life Sciences Edition that satisfy these conditions. This task is a step in "Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition" on page 63.

NOTE: This procedure is for illustrative purposes only; configuring a business process to lock records in general will vary according to Oracle CRM On Demand installation and is dependent on the customer's business rules for locking data.

To create a business process to lock records in general in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and navigate to Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, *Locking XYZ Record*, where XYZ is one of the following:
      - Account
      - Business Plan
      - Contact
      - Lead
      - Objective
      - Opportunity
      - Service Request
   b. In the Object Name field, select XYZ from the menu.

      The Transition field automatically displays *Status* by default.
   c. (Optional) In the Description field, enter a description of the business process.
3. Click Save.
4. On the Process List page, open the business process (Locking *XYZ* Record) that you just created.
5. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the record type accordingly.

   For example, the following table shows some transition states.

Record Type	State	Disable Update Check Box	Disable Delete or Remove Check Box
Account	Active	Not selected	Not selected
	Inactive	Not selected	Selected
	Closed	Selected	Selected
Business Plan	Current	Not selected	Not selected
	Final Approved	Not selected	Selected
	Submitted	Selected	Selected
Contact	Active	Not selected	Not selected
	Inactive	Not selected	Selected
	Closed	Selected	Selected
Lead	Qualifying	Not selected	Not selected
	Qualified	Not selected	Selected
	Converted	Selected	Selected
Objective	Current	Not selected	Not selected
	Final Approved	Not selected	Selected
	Submitted	Selected	Selected
Opportunity	Pending	Not selected	Not selected
	Won	Not selected	Selected
	Lost	Selected	Selected
Service Request	Pending	Not selected	Not selected
	Open	Not selected	Selected
	Closed	Selected	Selected

6 On the Process Detail page in the Transition States section, configure the transition states:

a Open the transition state.

b On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, then select the read-only check box for the fields as required. For example:

- For the following transition states, all fields must be available for update so do not select read-only for any fields: Active, Current, Qualifying, or Pending.
- For the following transition states, select read-only for some fields but not for fields that must be available for update: Inactive, Final Approved, Qualified, Won, or Open.
- For the following transition states, all fields must be locked so select read-only for all fields that you add: Closed, Submitted, Converted, or Lost.

c On the Transition State Detail page, click Add in the Related Access Control section, and then add the related access controls for the transition state as required.

For example, the following table shows the related access controls for some transition states.

Record Type	State	Disable Create or Add Check Box	Disable Update Check Box	Disable Delete or Remove Check Box
Account	Active	Not selected	Not selected	Not selected
	Inactive	Not selected	Not selected	Selected
	Closed	Selected	Selected	Selected
Business Plan	Current	Not selected	Not selected	Not selected
	Final Approved	Not selected	Not selected	Selected
	Submitted	Selected	Selected	Selected
Contact	Active	Not selected	Not selected	Not selected
	Inactive	Not selected	Not selected	Selected
	Closed	Selected	Selected	Selected
Lead	Qualifying	Not selected	Not selected	Not selected
	Qualified	Not selected	Not selected	Selected
	Converted	Selected	Selected	Selected
Objective	Current	Not selected	Not selected	Not selected
	Final Approved	Not selected	Not selected	Selected
	Submitted	Selected	Selected	Selected
Opportunity	Pending	Not selected	Not selected	Not selected
	Won	Not selected	Not selected	Selected
	Lost	Selected	Selected	Selected
Service Request	Pending	Not selected	Not selected	Not selected
	Open	Not selected	Not selected	Selected
	Closed	Selected	Selected	Selected

d Click Save.

7 Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

6 Initial Data Loading for Oracle CRM On Demand Life Sciences Edition

This chapter describes how to initially load the seed data for Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

- About Importing Data into Oracle CRM On Demand
- Process of Initially Loading the Seed Data for Oracle CRM On Demand Life Sciences Edition

About Importing Data into Oracle CRM On Demand

Proper planning is required to ensure a successful data import into Oracle CRM On Demand and corresponding industry editions. Before you begin to import your data, it is recommended that you:

- Contact Customer Care to begin planning your import.
- Review the topics about preparing for data importing, importing your data, data checking guidelines, and content management in *Oracle CRM On Demand Online Help*.
- Prepare your comma-separated value (CSV) files and add any necessary fields or picklist values to your Oracle CRM On Demand application.
- Test your import with a small amount of data first, before performing a full data import.

You can create an inventory period manually, or using the import functionality in Oracle CRM On Demand Life Sciences Edition. Typically, inventory periods for users are populated using the import functionality when Oracle CRM On Demand Life Sciences Edition is first set up for a company.

For adding multiple product categories, products, sample lots, users, allocations, and sample inventory records, it is recommended that you create an import file (in CSV format), and then ask your company administrator to load the data into the inventory period.

Import the seed data for Oracle CRM On Demand Life Sciences Edition in the following order:

- Product Categories
- Products
- Sample Lots
- Users
- Inventory Periods
- Allocations
- Sample Inventory

For information about preparing the fields of your seed data for data import, see the topics about import preparation in *Oracle CRM On Demand Online Help*.

Process of Initially Loading the Seed Data for Oracle CRM On Demand Life Sciences Edition

The last step in "Process of Configuring Oracle CRM On Demand Life Sciences Edition" on page 16 is to load the seed data for product categories, products, sample lots, users, inventory periods, allocations, and sample inventory. Use the following procedure to initially load the seed data for Oracle CRM On Demand Life Sciences Edition.

To initially load the seed data for Oracle CRM On Demand Life Sciences Edition

1. Set up product categories for Oracle CRM On Demand Life Sciences Edition.

   For more information about setting up product categories for Oracle CRM On Demand Life Sciences Edition, see *Oracle CRM On Demand Online Help*.

2. Set up products for Oracle CRM On Demand Life Sciences Edition. For example, define your samples as products.

   For more information about setting up company products for Oracle CRM On Demand Life Sciences Edition, see *Oracle CRM On Demand Online Help*.

3. Confirm that Customer Care has provisioned your company to use Oracle CRM On Demand Life Sciences Edition.

   For more information, see "About Provisioning Oracle CRM On Demand Life Sciences Edition" on page 14.

4. If not already done, set up life sciences roles, record type access for each role, and assign privileges accordingly.

   For more information, see Chapter 4, "Setting Up Access Profiles for Oracle CRM On Demand Life Sciences Edition."

5. Prepare your CSV files and add any necessary fields or picklist values to the application.

   For information about preparing the fields of your seed data for data import, see the topics about import preparation in *Oracle CRM On Demand Online Help*.

6. Import the seed data for Oracle CRM On Demand Life Sciences Edition in the following order:

   - Product Categories
   - Products
   - Sample Lots
   - Users
   - Inventory Periods
   - Allocations
   - Sample Inventory

For more information about importing seed data, see the topic about importing your data in *Oracle CRM On Demand Online Help*.

7 Setting Up Custom Objects for Oracle CRM On Demand Life Sciences Edition

This chapter describes how to set up custom objects for Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

- About Custom Objects
- Configuring Custom Objects for Oracle CRM On Demand Life Sciences Edition

About Custom Objects

Most record types are provisioned for you when Customer Care sets up your company to use Oracle CRM On Demand Life Sciences Edition. For more information, see "Record Types for Oracle CRM On Demand Life Sciences Edition" on page 15. *Custom object* record types are not provisioned by default. The following *custom object* record types must first be provisioned for your company by Customer Care before you can configure them for Oracle CRM On Demand Life Sciences Edition.

- Custom Object 01
- Custom Object 02
- Custom Object 03
- Custom Object 04-10
- Custom Object 11-15
- Custom Object 16-20
- Custom Object 21-25
- Custom Object 26-30
- Custom Object 31-35
- Custom Object 36-40

Customers can request to provision up to 40 custom objects to allow them to meet their unique business requirements. These custom objects are provisioned in numeric order. For example, if the customer requires two custom objects, then provision Custom Object 01 first, followed by Custom Object 02. Do not provision Custom Object 03 until the customer requests a third custom object.

Custom Objects 01, 02, and 03 have individual privileges. The privileges for the remaining custom objects are grouped. There is a privilege for Custom Objects 04 through 10, a privilege for Custom Objects 11 through 15, and so on. All other provisioning steps for custom objects are done for one object at a time.

When you create a new company, Custom Objects 01 through 10 are already provisioned for the administrator role. If a company wants to have Custom Objects 11 through 15 provisioned, Custom Objects 16 through 20 provisioned and so on, it must ask Customer Care to provision them.

If the custom object is not already provisioned for an existing company, the company must contact Customer Care if it wants any of the custom objects to be provisioned.

The following record types support custom objects in Oracle CRM On Demand Life Sciences Edition:

- Account
- Activity
- Allocation
- Business Plan
- Contact
- Contact Best Time
- Contact State License
- Inventory Audit Report
- Inventory Period
- MedEd Event
- Messaging Plan
- Messaging Plan Item
- Messaging Plan Item Relations
- Message Response
- Objective
- Order
- Order Item
- Plan Accounts
- Plan Contact
- Plan Opportunity
- Sample Disclaimer
- Sample Inventory
- Sample Lot
- Sample Transaction
- Signature
- Smart Call
- Solution
- Transaction Item

For more information about custom objects, see *Oracle CRM On Demand Provisioning Guide* and *Oracle CRM On Demand Online Help*.

Configuring Custom Objects for Oracle CRM On Demand Life Sciences Edition

Use the following procedure to configure a custom object for a role in Oracle CRM On Demand Life Sciences Edition.

To configure Custom Object N for Oracle CRM On Demand Life Sciences Edition

1. Provision Custom Object *N* for a role in Oracle CRM On Demand Life Sciences Edition.

   This step involves setting up an access profile and access options for the custom object. Customer Care performs this task. For more information about provisioning a custom object, see *Oracle CRM On Demand Provisioning Guide*.

2. Configure the field setup for Custom Object *N*.

   For example, configure the field setup for Custom Object 01 as follows:

   a. In Oracle CRM On Demand, click Admin, and then Application Customization.

   b. In the Record Type Setup section, click Custom Object 01.

   c. In the Field Management section, click the Custom Object 01 Field Setup link.

   d. On the Custom Object 01 Fields page, click New Field, Rename Field, the Edit link or the Edit Picklist link, as necessary, and configure the fields as required to support your business processes. For example:

      - To configure Custom Object 01 for Business Plan, then you must enable the Business Plan field on the Custom Object 01 Fields page.

      - To configure Custom Object 01 for Objective, then you must enable the Objective field on the Custom Object 01 Fields page.

   For more information about configuring fields, see "Configuring the Fields for Oracle CRM On Demand Life Sciences Edition" on page 17.

3. Configure a page layout for Custom Object *N*.

   For information about the steps involved in configuring page layouts, see "Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition" on page 21.

4. Display Custom Object *N* as a Related Information section on the appropriate record type page layout that you want to establish a relationship between.

   For example:

   - If configuring Custom Object 01 for Business Plan, then configure LS Business Plan Page Layout to display Custom Object 01 as a related information section.

   - If configuring Custom Object 01 for Objective, then configure LS Objective Page Layout to display Custom Object 01 as a related information section.

   For more information, see "Page Layout Configurations for the LS Field Sales Rep Role" on page 22 and "Related Information Sections for the LS Field Sales Rep Role Page Layouts" on page 43.

5 Configure the access level for the related Custom Object *N*.

For more information, see "Setting Up Access Profiles for Life Sciences Roles" on page 49 and "Access Levels for the LS Field Sales Rep Role" on page 51.

8 Key Account Management for Oracle CRM On Demand Life Sciences Edition

This chapter describes how to set up key account management for business planning, budgeting, and marketing so that pharmaceutical sales representatives can use business plan, fund, fund request, market development fund request, and medical education event to manage medical event budgets, fund requests, market development funds, and associated costs. It includes the following topics:

About Key Account Management

Oracle CRM On Demand Life Sciences Edition provides an integrated solution for business planning, budgeting, and marketing, so that pharmaceutical sales representatives can manage medical event budgets, fund requests, market development funds, and associated costs. It provides the following marketing record types:

- **Activity.** You can use this record type to review, create, and update your activities and to review and update your planned calls.
- **Business Plan.** You can use this record type to set the overall budget by region.
- **Campaign.** You can use this record type to create, update, and track campaigns.
- **Fund.** You can use this record type to track budget allocations and usage.
- **Fund Request.** You can use this record type to manage budget-approval requests.
- **MDF Request.** You can use this record type to make marketing development funds (MDF) available to partners for the purpose of selling products in a specific geographical area.
- **MedEd Event.** You can use this record type to plan and track medical education events.
- **Messaging Plan.** You can use this record type to create, update, and track messaging plans.
- **Objective.** You can use this record type to create, update, and track objectives for business plans.
- **Order.** You can use this record type to create, update, and track orders and associated order items for products.

To use key account management, you must configure certain record types correctly, see "Process of Configuring Key Account Management Record Types in Oracle CRM On Demand Life Sciences Edition" on page 88.

Restrictions That Apply When Configuring Key Account Management Record Types

Before you start configuring the key planning and marketing record types for key account management, note the following restrictions:

- You can associate a business plan with several messaging plans and medical education events.
- You can associate a campaign and an objective and several medical education events.
- You can associate a medical education event and an objective with only one fund.
- You can associate a fund request with several activities.

To use key account management, you must configure certain record types correctly, see "Process of Configuring Key Account Management Record Types in Oracle CRM On Demand Life Sciences Edition" on page 88.

Process of Configuring Key Account Management Record Types in Oracle CRM On Demand Life Sciences Edition

You must configure certain key planning and marketing record types in Oracle CRM On Demand Life Sciences Edition, so that they are linked to or can be associated with each other to provide an integrated solution for business planning, budgeting, and marketing. For information on the restrictions, see "Restrictions That Apply When Configuring Key Account Management Record Types."

To configure key account management record types for Oracle CRM On Demand Life Sciences Edition, perform the following tasks:

1. Set up the workflow rules that will trigger integration events for the following key business planning, budgeting, and marketing record types as required:
   - Activity
   - Business Plan
   - Campaigns
   - Fund
   - Fund Request
   - MDF Request
   - MedEd Evens
   - Messaging Plan
   - Objective
   - Order

For more information about workflow rules and creating workflow rules, see *Oracle CRM On Demand Online Help*.

2 Make sure that the key business planning, budgeting, and marketing record types are added to or can be displayed on the appropriate page layouts, as shown in the following table. For example, do the following:

- Link medical education events to business plans, campaign, market development fund request, and objective.
- Link an activity to a fund and fund request, and so on.

For more information about configuring page layouts, see "Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition" on page 21.

Record Type	Page Layout	Displayed Information	Comment
Activity	You can use the following: ■ LS Account Call ■ LS Contact Call ■ LS Smart Call ■ LS Attendee Call ■ Page Layout	Fund	You can associate many activities with a fund.
		Fund Request	You can associate many activities with a fund request.
Business Plan	LS Business Plan Page Layout	MedEd Event	You can associate a business plan with more than one medical education event.
		Messaging Plan	You can associate a business plan with more than one messaging plan.
Campaign	LS Campaign Page Layout	MedEd Event	You can associate a campaign with more than one medical education event.
Fund	LS Fund Page Layout	Activity	You can associate a fund with more than one activity.
Fund Request	LS Fund Request Page Layout	Activity	You can associate a fund request with more than one activity.
MDF Request	LS MDF Request Page Layout	MedEd Event	You can associate only one market development fund request with a medical education event.
		Objective	You can associate many market development fund requests with an objective.

Record Type	Page Layout	Displayed Information	Comment
MedEd Event	LS MedEd Event Page Layout	MDF Request	You can associate a medical education event with only one market development fund request.
		Business Plan	You can associate many medical education events with a business plan.
		Campaign	You can associate many medical education events with a campaign.
		Objective	You can associate many medical education events with an objective.
Messaging Plan	LS Messaging Plan Page Layout	Business Plan	You can associate many messaging plans with a business plan.
Objective	LS Objective Page Layout	MedEd Event	You can associate an objective with more than one medical education event.
		MDF Request	You can associate an objective with more than one market development fund request.

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