

Oracle Migration Tool On Demand Guide

Release 20
June 2012

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1

What's New in This Release

What's New in Oracle Migration Tool On Demand Guide, Release 20

This guide describes how to use the Oracle Migration Tool On Demand client to migrate Oracle CRM On Demand configuration data between different environments, for example, between a testing environment and a production environment.

[Table 1](#) lists changes described in this version of the documentation to support Release 20 of the software.

Table 1. What's New in Oracle Migration Tool On Demand Guide, Release 20

Topic	Description
Required Privileges for Company Administrators on page 14	Modified topic. The privileges required for the new features supported in Release 20 have been added to Table 2 on page 14 .
Required Privileges for Nonadministrative Users on page 17	Modified topic. The privileges required for the new features supported in Release 20 have been added to Table 3 on page 17 .
Starting the Oracle Migration Tool On Demand Client on page 19	Modified topic. The syntax of the Oracle Migration Tool On Demand client has been updated to include an optional parameter to specify a log file, and up to three optional parameters.
Considerations for Character Encoding in Configuration Data on page 25	New topic. This topic describes the requirement to encode characters such as ampersands in the configuration data contained in XML files.
Updating or Inserting a Cascading Picklist (Upsert) on page 45	New topic. This topic describes how to perform an upsert operation on cascading picklists.
Chapter 7, "Migrating Custom Web Applets"	New chapter. This chapter describes how to use the Oracle Migration Tool On Demand client to migrate custom Web applet configuration information.
Updating or Inserting a Homepage Layout (Upsert) on page 90	New topic. This topic describes how to perform an upsert operation on homepage layouts.
Page Layouts on page 93	Modified topic. Updated Table 33 on page 93 to reflect the migration of page layout section information.
Elements and Sections in the Page Layout Section XML Output File on page 98	Modified topic. The element and section descriptions for page layout section information have been added to Table 34 on page 94 .
Migrating Page Layout Section Information on page 103	New topic. This topic describes how to use the Oracle Migration Tool On Demand client to migrate page layout section information.

Table 1. What's New in Oracle Migration Tool On Demand Guide, Release 20

Topic	Description
Chapter 14, "Migrating Related Information Layouts"	New chapter. This chapter describes how to use the Oracle Migration Tool On Demand client to migrate related information layouts.
Chapter 16, "Migrating Sales Assessment Templates"	New chapter. This chapter describes how to use the Oracle Migration Tool On Demand client to migrate sales assessment template information.
Chapter 17, "Migrating Workflow Rules and Action Sets"	New chapter. This chapter describes how to use the Oracle Migration Tool On Demand client to migrate workflow action sets and rules.
Replicating All Configuration Data from a Source Environment to a Target Environment on page 151	Modified topic. This topic has been updated to include the objects supported by the Oracle Migration Tool On Demand client in Release 20.
Replicating Selective Configuration Data from a Source Environment to a Target Environment on page 156	Modified topic. This topic has been updated to include the objects supported by the Oracle Migration Tool On Demand client in Release 20.
Appendix A, "Reference Information for Oracle Migration Tool On Demand"	Modified appendix. The reference information has been revised for Release 20.

Additional Changes

The chapters in this guide have been placed in alphabetic order by object name.

Audience

The target audience for this guide is company administrators for Oracle CRM On Demand who want to copy or move the existing configuration data for Oracle CRM On Demand from one environment to another. For example, company administrators might want to apply their company's configuration data from a customer test environment to a production environment.

2

Getting Started with Oracle Migration Tool On Demand

This chapter describes how to start using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Oracle Migration Tool On Demand Client on page 11](#)
- [Software Requirements for Installing Oracle Migration Tool On Demand on page 13](#)
- [Downloading the Oracle Migration Tool On Demand Client on page 18](#)
- [Installing and Configuring the Oracle Migration Tool On Demand Client on page 18](#)
- [Starting the Oracle Migration Tool On Demand Client on page 19](#)
- [Commands for Oracle Migration Tool On Demand on page 20](#)
- [Specifying Internet Proxy Server Information on page 22](#)
- [XML Templates and Web Services Description Language on page 23](#)
- [Considerations for Using the Oracle CRM On Demand Migration Tool Client on page 25](#)

CAUTION: As a company administrator using the Oracle Migration Tool On Demand client, you must understand its functionality and capabilities. Failure to do so might result in unintended changes to your environment. You must back up your existing configuration data for Oracle CRM On Demand before using the Oracle Migration Tool On Demand client. Oracle will not be responsible for any damage incurred from improper use of the Oracle Migration Tool On Demand client.

Oracle Migration Tool On Demand Client

The Oracle Migration Tool On Demand client is a command-line based utility, which eliminates having to manually reproduce customized configuration data from one Oracle CRM On Demand environment to another, for example, from a customer test environment to a production environment. The Oracle Migration Tool On Demand client allows you to extract and import specific configuration data to your computer interactively, or in batch mode. Using the batch commands along with a third-party program, you might be able to redirect it elsewhere. The administration Web services allow client applications to access configuration data. The configuration data includes the following:

- Access profiles
- Action Bar Layouts
- Cascading picklists
- Custom record types
- Custom Web Applets (for Homepages, Detail pages, Action bars, and the Homepage tab)
- Custom Web Links
- Custom Web tabs

- Field management definitions
- Homepage Layouts
- Page Layouts (field information, related information, and sections)
- Picklists
- Related Information Layouts
- Roles Management
- Sales assessment templates
- Workflow rules and actions

For example, you can use the downloadable client and the administration Web services to copy specific configuration data between the customer test environment and a production environment.

In general, the Oracle Migration Tool On Demand client provides the same functionality that is available with the Oracle CRM On Demand user interface. Typically, if you are not able to perform a task in the user interface, you cannot perform the equivalent task in the Oracle Migration Tool On Demand client, for example, delete an access profile, edit a field type, and so on.

The Oracle Migration Tool On Demand client verifies that you are using the latest version. If you run a command on the Oracle CRM On Demand server using an unsupported version, then you are prompted to download the latest version of the Oracle Migration Tool On Demand client.

Auditing and Log Files

All Web service operations in the customer test environment are audited. All successful operations as well as processing errors, such as Request Size exceeded, Invalid SOAP request, rate-limit error, and so on, are audited. You can find the audited records in the Web Services Utilization section in Oracle CRM On Demand (click Admin, and then Web Services Utilization).

You can view the Oracle Migration Tool On Demand client log files in the *<Installation directory>\log* directory, for example:

C:\Oracle Migration Tool On Demand\log

Any requests by the Oracle Migration Tool On Demand client are also captured in the Web Services Utilization section in Oracle CRM On Demand.

Supported Operating Systems for Oracle Migration Tool On Demand

Although the Oracle Migration Tool On Demand client might successfully migrate configuration data on any operating system that supports extraction of a ZIP file, the client has been fully tested only on Microsoft Windows. The Oracle Migration Tool On Demand client is supported on the following Microsoft Windows operating systems:

- Microsoft Windows 2000 Professional Edition
- Microsoft Windows XP Professional and Home Version
- Microsoft Windows Vista Enterprise Edition
- Microsoft Windows 7

Supported Releases of Oracle CRM On Demand

The Oracle Migration Tool On Demand client supports exporting and importing configuration data between any two Oracle CRM On Demand tenants on the same release (for example, two Release 20 tenants). In addition, the version of the Oracle Migration Tool On Demand client you are using must be the same as the release of Oracle CRM On Demand with which you are working (for example, you cannot use the Release 20 Oracle Migration Tool On Demand client on Release 19, Release 18, or Release 17 of Oracle CRM On Demand).

Typically, the patch level between two Oracle CRM On Demand tenants does not impact migration. However, the introduction of a new configuration attribute or a new attribute in the Oracle CRM On Demand programming interface API in a patch might impact the migration. For example, if a new configuration attribute is added to field management, you must remove that value from the migration request to an older patch level, because the older patch level does not support that field value.

Software Requirements for Installing Oracle Migration Tool On Demand

The Oracle Migration Tool On Demand client has the following software requirements:

- Java Runtime Environment (JRE) 1.5 or later installed on your computer
- A ZIP utility (for example, WINZIP) to extract the files to your computer
- Appropriate access to set the environment variables on your computer

Checking Your Java Runtime Environment

To check whether you have the correct version of the Java Runtime Environment (JRE) installed on your computer, complete the following procedure.

To check your Java Runtime Environment (JRE)

- 1 On your Windows computer, open the Control Panel.
 - 2 In the Control Panel:
 - For Classic View, double-click the Java icon
 - For Category View, select the Other Control Panel Options, and click the Java icon
- NOTE:** If the Java icon does not exist, then you do not have JRE installed. To get the latest version, go to <http://www.java.com>.
- 3 Within the Java Control Panel window, click the Java tab, then click the View button for Java Application Runtime Settings.
 - 4 Under the Platform column, verify that version 1.5 or later exists, and that it is set up.

Required Privileges for Company Administrators

This topic describes the required privileges for Company Administrators to use the Oracle Migration Tool On Demand client to read and customize various Oracle CRM On Demand objects. [Table 2 on page 14](#) summarizes these privileges. In addition to these specific privileges, Web services must be set up on Oracle CRM On Demand. For more information on Web services, see *Oracle Web Services On Demand Guide*, available from the Oracle CRM On Demand documentation library on Oracle Technology Network (OTN) and from the Oracle CRM On Demand application by clicking Admin, Web Services Administration, and then Download Documentation.

For more information about setting and checking privileges, see the information on role management in *Oracle CRM On Demand Online Help*.

Table 2. Required Privileges and Requirements for Company Administrators

Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
Access Profiles	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Manage Users and Access 	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Action Bars	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	None	None
Cascading Picklists	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	Cascading picklists must be supported by the object.
Custom Record Types	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Custom Web Applets	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Manage Custom Web Applets ■ Customize Application 	Detail page custom Web applets and Homepage custom Web applets require Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None

Table 2. Required Privileges and Requirements for Company Administrators

Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
Custom Web Links	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Custom Web Tab	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	None	None
Field Management	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	See Additional Notes and Requirements :
Additional Notes and Requirements: <ul style="list-style-type: none"> ■ Field Management must be supported for the object. ■ The object must be set up for field renaming, if the operation is Upsert. ■ The object must be set up for new fields, if the operation is Create. ■ Advanced Field Management must be set up if the <ValidationErrorMsg>, <ValidationExpression>, or <PostDefault> elements are modified. ■ The Integration Tag can be changed only if renaming is allowed on that object. A multi-select picklist can be created or updated only if it is set up for the object.			
Homepages	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application ■ Customize Application - Manage Homepage Customizations 	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Page Layouts	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	None	None

Table 2. Required Privileges and Requirements for Company Administrators

Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
Picklists	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	Field management must be supported by the object.
Related Information Layouts	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Roles	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Customize Application 	None	None
Sales Assessment Templates	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Manage Assessments Access ■ Manage Content 	None	None
Workflow Rules and Actions	<ul style="list-style-type: none"> ■ Enable Web Services Access ■ Manage Data Rules - Manage Workflow Rules ■ Workflow Cancel Save 	None	None

In addition to the privileges listed in [Table 2 on page 14](#), you require:

- The Data Management: Import privilege and Data Management: Export privilege to download the Oracle Migration Tool On Demand client.
- The Enable Web Services Access privilege to run the Oracle Migration Tool On Demand client.

Required Privileges for Nonadministrative Users

Nonadministrative users of Oracle CRM On Demand can use the Oracle Migration Tool On Demand client to read the configurations for certain CRM On Demand objects, however, these users cannot customize any objects using the client. The user only requires the Enable Web Services Access privilege. [Table 3](#) displays the objects and privileges that nonadministrative users require to use the Oracle Migration Tool On Demand client.

Table 3. Required Privileges for Nonadministrative Users

Feature Name	User Level Privilege	Function
Access Profiles	Enable Web Services Access	Read and ReadAll
Cascading Picklists	Enable Web Services Access	Read and ReadAll
Custom Record Types	Enable Web Services Access	Read and ReadAll
Custom Web Applets	Enable Web Services Access	Read and ReadAll
Field Management	Enable Web Services Access	Read and ReadAll
Page Layout Fields	Enable Web Services Access	ReadAll
Page Layout Related Information	Enable Web Services Access	ReadAll
Page Layout Sections	Enable Web Services Access	ReadAll
Picklists	Enable Web Services Access	Read and ReadAll
Related Information Layouts	Enable Web Services Access	Read and ReadAll
Roles	Enable Web Services Access	ReadAll
Workflow Rules and Actions	Enable Web Services Access	Read and ReadAll

NOTE: For the features that are not listed in [Table 3](#) (actions bars, custom Web link fields, custom Web tabs, custom fields, homepage layouts, or sales assessment templates), a user requires the privileges listed in [Table 2 on page 14](#) to run the Read or ReadAll commands.

Language Considerations When Migrating Configuration Data

To migrate configuration data, for example, an access profile, the same languages that are set up in the XML file or source company must be set up in the target company. For example, if the XML file contains definitions for English, French, and Traditional Chinese, and the target company has definitions for English, French, and German, an upsert operation fails. The number of languages is the same but the operation does not succeed because Traditional Chinese is not set up in the target company. However, if the XML file contains English and French definitions and the target company has definitions for English, French, and German, the upsert operation succeeds because for any language that has not been defined (in this case, German), the system name is used. A *system name* is the name which identifies an object uniquely in the Oracle CRM On Demand application.

Downloading the Oracle Migration Tool On Demand Client

To download the Oracle Migration Tool On Demand client from Oracle CRM On Demand, the user account must have the following privileges assigned:

- Data Management: Export
- Data Management: Import

See the information on privileges and user roles in *Oracle CRM On Demand Online Help*.

To download the Oracle Migration Tool On Demand client

- 1 Create a directory on your computer in which to extract the Oracle Migration Tool On Demand client files, for example:

C:\Oracle Migration Tool On Demand

- 2 Sign in to Oracle CRM On Demand, and click Admin.
- 3 Under Data Management Tools, click Import and Export Tools.
- 4 Under Metadata Import and Export Tools, click Oracle Migration Tool On Demand.
- 5 Save the ZIP file on your computer in the directory that you created, for example:

C:\Oracle Migration Tool On Demand

Installing and Configuring the Oracle Migration Tool On Demand Client

Complete the following procedure to install and set up the Oracle Migration Tool On Demand client.

It is recommended that you set the environment variables in the following procedure at the system level on which the Oracle Migration Tool On Demand client is installed, so that all users of the computer can run the client.

NOTE: Even though a user can successfully run the Oracle Migration Tool On Demand client, it does not mean that he or she can read and load company configuration data successfully. The user must have the login credentials to access Oracle CRM On Demand and the appropriate privileges to read and load configuration data.

To install and configure the Oracle Migration Tool On Demand client

- 1 Extract the contents of the Oracle Migration Tool On Demand ZIP file in the directory that you created in [Step 1](#) of the procedure in [Downloading the Oracle Migration Tool On Demand Client on page 18](#). For example:

C:\Oracle Migration Tool On Demand

- 2 Navigate to the Environment Variables applet on your Windows computer by right-clicking My Computer, selecting Properties, and under the Advanced Tab, and clicking Environment Variables.

- 3 In the Windows Environment Variables applet, set the following environment variables on your computer:

Variable Name=JAVA_HOME,
Variable Value=<path of JRE 1.5 or later>

For example:

C:\Program Files\Java\jre1.5.0_10

Set this variable if it is not already set.

Variable Name=MIGRATIONTOOL_HOME,
Variable Value=<path of where the tool is installed>

For example:

C:\Oracle Migration Tool On Demand

Starting the Oracle Migration Tool On Demand Client

After you have configured the Oracle Migration Tool On Demand client, you can start it using the following steps.

To start the Oracle Migration Tool On Demand client

- 1 Open a command line window.
- 2 Navigate to the directory where you have extracted the Oracle Migration Tool On Demand client, for example:

C:\Oracle Migration Tool On Demand

- 3 Run the Oracle Migration Tool On Demand client from the command line:

```
migrationtool -u <userID> -s <server URL> [-f "<log file>"] [Read | ReadAll | Upsert | Delete] [<type>] [<parm1>] [<parm2>] [<parm3>]
```

where:

- <userID> is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- <server URL> is the URL of the Oracle CRM On Demand server where your company resides.
- <log file> designates the name and location of the log file from the Oracle Migration Tool On Demand client run. For example:

```
set outputDir=Oracle Migration Tool On Demand\test
```

```
migrationtool -u USERNAME -s http://slcxxxxxx.us.oracle.com:30090  
-f "D:\%outputDir%\test.log" ReadAll FieldManagement
```

This parameter is optional. If you do not specify this parameter, the Oracle Migration Tool On Demand client stores the log file in the default location, *<install_dir>\log* (for example, C:\Oracle Migration Tool On Demand\log). For more information on logging, see [Auditing and Log Files on page 12](#).

NOTE: Quotation marks are required only if the path or file name contains spaces.

- *<type>* is the type of configuration data that you are migrating. For example, for access profile configuration data, use *AccessProfile*.

NOTE: The detailed syntax for running Oracle Migration Tool for each specific type of configuration data that you are migrating is provided in the chapter corresponding to that configuration data. For example, to migrate access profiles, see [Chapter 3, "Migrating Access Profiles."](#) It is recommended that you refer to the examples in each chapter that correspond to the configuration data that you are migrating.

- [*<parm1>*] [*<parm2>*] [*<parm3>*] are optional parameters, for example *-proxyserver* to specify a proxy server and *-proxid* to specify the proxy server user ID. For more information on specifying proxy servers, see [Specifying Internet Proxy Server Information on page 22](#).
- 4 The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Commands for Oracle Migration Tool On Demand

The commands, feature names, and specific configuration data accepted by the Oracle Migration Tool On Demand client are case sensitive. For example, the following commands have specific spellings:

- The *ReadAll* command must be referenced as *ReadAll* (capital *R* and capital *A*).
- The access profile feature must be referenced as *AccessProfile* (capital *A* and capital *P*).
- An access profile configuration data, called *Service Manager* in the user interface, must be referenced as *Service Manager*.

Table 4 displays the exact spelling and case of the commands supported by the Oracle Migration Tool On Demand client.

Table 4. Oracle Migration Tool On Demand client Command Names

Command Name	Description
ReadAll	Exports all configuration data of a specific type from an Oracle CRM On Demand server.
Read	Exports a single set of configuration data of a specific type from an Oracle CRM On Demand server.
Upsert	Updates or inserts configuration data of a specific type to an Oracle CRM On Demand server, as required.
Delete	Deletes a single set of configuration data from an Oracle CRM On Demand server. NOTE: This command is supported only for custom Web tabs and Workflow Rule.
Create	Creates a new field or set of fields based on the contents within an XML file. NOTE: This command is supported only for field management.
help	Launches the user assistance provided with the Oracle Migration Tool On Demand client.

Location of XML Files for Read and ReadAll Commands

By default, the XML files created for the Read and ReadAll commands, are stored in:

<Installation directory>\Repository\<Feature>

NOTE: The Repository folder is created after running the Oracle Migration Tool On Demand client the first time.

where:

- *<Installation directory>* represents the directory where you have installed the Oracle Migration Tool On Demand client on your computer, for example:

C:\Oracle Migration Tool On Demand

- *<Feature>* is one of the following features of the Oracle Migration Tool On Demand client:

- AccessProfile
- ActionBarLayout
- CascadingPicklist
- CustomRecordType
- Custom Web applets:
 - ActionBarCustomWebApplet
 - DetailPageCustomWebApplet

- `HomePageCustomWebApplet`
- `HomeTabCustomWebApplet`
- `CustomWebLink`
- `CustomWebTab`
- `FieldManagement`
- `HomepageLayout`
- `PageLayoutField`
- `PageLayoutRelatedInformation`
- `PageLayoutSection`
- `Picklist`
- `RelatedInformationLayout`
- `Role`
- `SalesAssessmentTemplate`
- `WorkflowAction`
- `WorkflowRuleSet`

For example, when running the `Read` or `ReadAll` commands to extract access profiles, the Oracle Migration Tool On Demand client stores the XML files that it generates in the following directory:

`C:\Oracle Migration Tool On Demand\Repository\AccessProfile`

Specifying Internet Proxy Server Information

Users who access the Internet using a proxy server can specify the proxy server information with the Oracle Migration Tool On Demand client. [Table 5](#) contains the parameters used to specify proxy server information.

Table 5. Parameters Used to Specify an Internet Proxy Server

Parameter	Description
<code>-proxyserver <proxy_server: [<port>]></code>	Specifies the proxy server and the optional server port number to be used by the Oracle Migration Tool On Demand client.
<code>-proxyid <proxy_server_userid></code>	Specifies the proxy user ID to be used by the Oracle Migration Tool On Demand client.

Examples of Using Parameters to Specify an Internet Proxy Server

The following is an example of specifying a proxy server where the user is prompted for the proxy password after entering the Oracle Migration Tool On Demand client command:

```
migrationtool -u <userID> -s <server URL> -proxyserver <myproxyserver: [port]>  
-proxyid <proxyuserID> ReadAll AccessProfile
```

Where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.
- `<myproxyserver: [<port>]>` is the URL for the Internet proxy server, and `[<port>]` is the optional proxy server port. If the port is not specified, then port 80 is used by default.
- `<proxyuserID>` is the user ID for the Internet proxy server.

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password and the password for the proxy server, which can be redirected (using the `pipe` command) to the client program from standard input; that is, from a file, from the command line, or from another program.

If you are using a file to enter your passwords, then they must be on separate lines with the Oracle CRM On Demand password appearing first, followed by the proxy server password, as follows:

```
MyOnDemandPassword  
MyProxyPassword
```

The following format is incorrect, where passwords are separated by a space on the same line:

```
MyOnDemandPassword MyProxyPassword
```

The following format is correct, but the order is incorrect:

```
MyProxyPassword  
MyOnDemandPassword
```

NOTE: The examples elsewhere in this guide that display how to use the Oracle Migration Tool On Demand client do not display the syntax to specify an Internet proxy server.

XML Templates and Web Services Description Language

Certain Oracle CRM On Demand features have elements that might be required, might require a default value, or might be optional. Understanding how these elements are categorized helps you understand how to read and comprehend the information in an XML template. This topic helps you to determine which elements are required for migrating configuration data.

To understand the elements, you must download the Web Services Description Language (WSDL) for each feature that you want, and scan through each WSDL. After downloading the WSDL to your computer, view the content with an editor (for example, Notepad). As you scan the WSDL, take note of the elements with defined `minOccurs` and `maxOccurs` values. For more information on downloading WSDLs, see [Downloading WSDLs from Oracle CRM On Demand](#).

The minOccurs value and maxOccurs value are attributes of the <xsd:element> element in the XSD schema language. These attributes determine whether the element defined by <xsd:element> in a WSDL file is optional, and how many times the element can occur in an XML file. For example, the following entry in a WSDL file indicates that the <Name> element is required.

```
<xsd:element name="Name" maxOccurs="1" minOccurs="1" type="apData:string100" />
```

Table 6 describes the values for minOccurs and maxOccurs.

Table 6. minOccurs and maxOccurs Values

minOccurs	maxOccurs	Description
0	1	The element is not required. If it is included, then a maximum of one entry can exist.
0	unbounded	The element is not required. If it is included, then it can exist multiple times.
1	1	The element is required, but it exists only one time.
1	unbounded	The element is required, but it can exist multiple times.

About Web Services APIs

For information about the APIs provided by Oracle CRM On Demand Web Services and other administration Web services, see *Oracle Web Services On Demand Guide*, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network (OTN). This guide is also available from the Oracle CRM On Demand application by clicking Admin, Web Services Administration, and then Download Documentation.

NOTE: Oracle CRM On Demand Web Services provides additional functionality that is not available with the Oracle Migration Tool On Demand client. This functionality includes the migration of currency picklists, industry picklists, out-of-the-box configuration data using the <IncludeAll> tag, and configuration data for the current user with the <CurrentUser> tag. For more information on this functionality, see *Oracle Web Services On Demand Guide*.

Downloading WSDLs from Oracle CRM On Demand

You can download the WSDL that you want from Oracle CRM On Demand by completing the following procedure.

NOTE: Downloading WSDLs other than Access Profiles requires the Customize Application privilege.

To download a WSDL from Oracle CRM On Demand

- 1 Sign in to Oracle CRM On Demand as a company administrator, and click Admin.
- 2 Under Web Services Integration, click Web Services Administration.
- 3 From the Select Service drop-down list, choose Administrative Services, and click Go.
- 4 Select the WSDL you want to download (for example, Access Profile), and click Download WSDL.

- 5 Save the selected WSDL to a known location on your computer, for example:

C:\Migration Tool On Demand\WSDL

Considerations for Using the Oracle CRM On Demand Migration Tool Client

The following topics describe some considerations when using the Oracle Migration Tool On Demand client for migrating Oracle CRM On Demand configuration data.

Considerations for the Marked for Translations Setting

This topic describes the impact of the Marked for Translation setting (that is set in the Oracle CRM On Demand user interface) on the migration of configuration data using the Oracle Migration Tool On Demand client:

- If Mark for Translation is selected, then customized configuration data is extracted only in the default language (for example, ENU) in READ or READALL operations.
- If Mark for Translation is not selected, then customized configuration data is extracted in all languages that are set up for the company (for example, ENU, FRA, ITA, and so on) in READ or READALL operations.

For example, consider extraction of Field Management configuration data where multiple languages are implemented for a company, and a field has been customized in each of the languages. For the default language, for example, ENU, if the Mark for Translation setting is not selected for the field, the field is extracted in all languages in a READ or READALL operation. If the Mark for Translation setting is selected in Oracle CRM On Demand for this particular field, then the field is extracted in all languages in a READ or READALL operation.

Essentially, when the Mark for Translation feature is used, it overwrites all the other languages except for the default language for certain fields with *Name*, where *Name* is the value provided by the user. Any extracts by the Oracle Migration Tool On Demand client includes only the translation value of the default language and excludes all other languages that have been replaced with *Name*.

NOTE: The Mark for Translation check box is only available in the Default Language in the Oracle CRM On Demand user interface.

Considerations for Character Encoding in Configuration Data

The Oracle Migration Tool On Demand client stores and transfers configuration data in XML. This allows customers to manage change through version control tools such as diff. Therefore, all serializations must follow XML formatting and encoding rules.

The most commonly occurring characters that must be encoded are:

- Ampersand (&). Encoded as *&#38;*.

- Apostrophe ('). Encoded as *'*.
- Double quotation mark ("). Encoded as *"*.
- Left angle bracket (<). Encoded as *<*.
- A right angle bracket (>). Encoded as *>*.

To preserve the integrity of the XML content:

- The encoded ampersand (&) and left angle bracket (&lt;) characters are necessary in XML content because they are used to avoid conflicts with XML entities and elements.
- The appropriate quote or apostrophe escaping is necessary when encoding attributes.

For example, if you extract data containing an ampersand character, the Oracle Migration Tool On Demand client renders the ampersand to & in the XML file. If you run the upsert operation on the data from the XML file, any & characters must be represented as & in the XML for the upsert to be successful

To further illustrate, consider a Custom Web Tab in the UI with the following URL value containing ampersand characters:

```
https://xxxx.yyyy.com/commerce/buyside/
commerce_manager.jsp?from_hp=true&_bm_trail_refresh=true&bm_cm_process_id=4482147
&_partnerAccountId=%%%Account_Id%%%&_partnerSessionId=%%%User
id%%%&_partnerSsoToken=%%%SSO Token%%%&_partnerSessionUrl=https%3A//secure-
ausomxkwa.crmondemand.com/Services/Integration&BM_URL_CAPTURE_COOKIE=si ebel -dev
```

After a READALL operation, the same URL in the XML is remapped to the following URL value with the ampersand characters encoded as & :

```
https://xxxx.yyyy.com/commerce/buyside/
commerce_manager.jsp?from_hp=true&#x26;_bm_trail_refresh=true&#x26;bm_cm_process_id
=4482147&#x26;_partnerAccountId=%%%Account_Id%%%&#x26;_partnerSessionId=%%%User
id%%%&#x26;_partnerSsoToken=%%%SSO Token%%%&#x26;_partnerSessionUrl=https%3A//
secure-ausomxkwa.crmondemand.com/Services/
Integration&#x26;BM_URL_CAPTURE_COOKIE=si ebel -dev
```

3

Migrating Access Profiles

This chapter describes how to migrate access profiles using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Access Profiles on page 27](#)
- [Privileges Required on page 27](#)
- [Elements and Sections of Access Profile XML Output File on page 28](#)
- [Migrating Access Profiles on page 30](#)

Access Profiles

An access profile is the set of security permissions that determines what data a user can access. [Table 7](#) describes the Oracle Migration Tool On Demand client commands that are used with access profiles. The commands are case-sensitive. For examples on running these commands, see [Migrating Access Profiles on page 30](#).

Table 7. Oracle Migration Tool On Demand Commands for Access Profiles

Command	Description
Read AccessProfile [<Access Profile System Name>]>	This command exports a single access profile from an Oracle CRM On Demand server.
ReadAll AccessProfile [<Location to store exported Access Profiles>]	This command exports all access profiles from an Oracle CRM On Demand server.
Upsert AccessProfile	This command updates or inserts a single access profile on an Oracle CRM On Demand server, as required.

NOTE: Do not assume that the system name of the access profile is the same as what you see in the user interface for Oracle CRM On Demand. For example, if you create an access profile called *My Access Profile* and later rename it to *My Renamed Access Profile*, the system name continues to be *My Access Profile*. Therefore, if you want to read this specific access profile, you must reference it by the name, *My Access Profile*, in your read request. The only way to determine the real name of an access profile that has been modified is to perform a ReadAll operation and export all the configuration data.

Privileges Required

The following privileges are required on the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access, Customize Application, Manage Users and Access, and Manage Access.

For example, if the access profile contains information about Custom Object 02, the user account requires the privilege, Manage Access: Custom Object 02, to be set up. For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections of Access Profile XML Output File

Table 8 describes the elements of the Access Profile XML output file.

Table 8. Description of Access Profile XML File Elements

Element	Description
<ns1: Name>	<p>This element contains the name of the access profile. This is the same name that is used to retrieve a single access profile.</p> <p>This name never changes during any updates. When performing an insert operation, this name is used as the display name if a display name is not provided in the <AccessProfileTranslation> element of the XML file.</p>
<ns1: Description>	<p>This element contains the description of the access profile that is used if one is not provided in the <AccessProfileTranslation> element of the XML file.</p>
<ns1: AvailableForTeam>	<p>This element indicates if the Grantable to Team Members privilege is checked in Step 1 of the Access Profile Wizard.</p>
<ns1: AvailableForBook>	<p>This element indicates if the Grantable to Book Users privilege is checked in Step 1 of the Access Profile Wizard.</p>
<ns1: Disabled>	<p>This element indicates if the Disabled element is checked in Step 1 of the Access Profile Wizard.</p>

Table 9 describes the sections of the Access Profile XML.

Table 9. Description of Access Profile XML File Sections

Section	Description
<pre> <ns1:ListOfAccessProfileTranslation> <ns1:AccessProfileTranslation> <ns1:LanguageCode>DEU</ns1:LanguageCode> <ns1:Title>Administrator Standardzugriffsprofil</ns1:Title> <ns1:Description>Vom System erzeugt</ns1:Description> </ns1:AccessProfileTranslation> </ns1:ListOfAccessProfileTranslation> </pre>	<p>This section indicates the title and description that are displayed for the language specified by the language code. See Language Codes and Their Corresponding Language and Country on page 163 for more details.</p> <p>In this example, when the user's language is set to German (DEU) in the access profile:</p> <ul style="list-style-type: none"> ■ The title is displayed as follows: <i>Administrator Standardzugriffsprofil</i> ■ The description is displayed as follows: <i>Vom System erzeugt</i>
<pre> <ns1:ListOfAccessProfileEntry> <ns1:AccessProfileEntry> <ns1:AccessObjectName>CustomObject10</ns1:AccessObjectName> <ns1:PermissionCode>R</ns1:PermissionCode> </ns1:AccessProfileEntry> </ns1:ListOfAccessProfileEntry> </pre>	<p>This section describes the access rights defined on the access profile for the object or the object's related information, including the permission code. The permission code is the code corresponding to the access level for an object, for example, R, RU, CRUD and so on.</p> <p>For information about the Access Object Name in the XML and its associated Display Name in the user interface, see Display Names and Their Corresponding Names in the Access Profile XML File on page 164.</p> <p>For information about the access rights available for each object and each object's related information, see Access Levels and Their Corresponding Permission Codes in the XML File on page 188.</p>

Migrating Access Profiles

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with access profiles:

- [Extracting a Single Access Profile](#)
- [Extracting a Single Access Profile by System Name Using a Template File](#)
- [Extracting All Access Profiles](#)
- [Extracting All Access Profiles to a Specific Location](#)
- [Updating or Inserting an Access Profile \(Upsert\)](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting a Single Access Profile

This topic describes how to extract a single access profile from your Oracle CRM On Demand server for your environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific access profile:

```
migrationtool -u <userID> -s <server URL> Read AccessProfile <system name of the access profile>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<system name of the access profile>* is the system name of the access profile that you want to extract, for example, Administrator Default Access Profile.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting a Single Access Profile

The following is an example of extracting a specific access profile: Administrator Default Access Profile:

```
migrationtool -u <userID> -s <server URL> Read AccessProfile "Administrator Default Access Profile"
```

NOTE: Quotation marks are required only if the access profile name contains spaces.

Extracting a Single Access Profile by System Name Using a Template File

This topic describes how to extract a single access profile from your Oracle CRM On Demand server for your environment (customer test environment or production) by system name, using a template file.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific access profile by system name, using an access profile input file that is derived from the access profile template file:

```
migrationtool -u <userID> -s <server URL> Read AccessProfile <access profile template>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<access profile template>* is an XML file that is derived from the default access profile template file on your computer. The default access profile template (AccessProfile.xml) is located in the *<install_path>\resources\template* directory, for example:

```
C:\Oracle Migration Tool On Demand\resources\template
```

NOTE: Do not modify the default template file. If the template file is modified, then a Read operation extracts only the access profile specified in the template file, bypassing what is provided on the command line. Instead, modify a copy of the default access profile.

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting a Single Access Profile by System Name Using a Template File

The following is an example of extracting a specific access profile by system name using a template file. In this example, before you run the Oracle Migration Tool On Demand client, make a copy of the default file, AccessProfile.xml, and in the copy, add the system name of the access profile between the tags:

```
<ns2: Name> </ns2: Name>
```

For example: `<ns2: Name>Administrator Default Access Profile</ns2: Name>`

```
migrationtool -u <userID> -s <server URL> Read AccessProfile "C:\Oracle Migration Tool On Demand\resources\template\MyAccessProfile.xml"
```

By default, the template files are stored in the following directory:

<path of Oracle Migration Tool>\resources\template

Also, quotation marks are required only if the name contains spaces. If quotation marks are not surrounding the name, then the Oracle Migration Tool On Demand client uses the first value and bypasses the remaining values. For example, if you have two access profiles called *Admin* and *Admin Access Profile*, and you send the following request (without quotation marks), the Oracle Migration Tool On Demand client extracts the Admin access profile, because no quotation marks are used. It uses the first value (Admin) and bypasses the rest (Access Profile):

```
migrationtool -u <userID> -s <server URL> Read AccessProfile Admin Access Profile
```

Extracting All Access Profiles

This topic describes how to extract all access profiles from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all access profiles:

```
migrationtool -u <userID> -s <server URL> ReadAll AccessProfile
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Access Profiles

The following is an example of extracting all access profiles from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll AccessProfile
```

Extracting All Access Profiles to a Specific Location

This topic describes how to extract all access profiles from your Oracle CRM On Demand environment (customer test environment or production) to a specific location.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all access profiles to a specific location:

```
migrationtool -u <userID> -s <server URL> ReadAll AccessProfile <folder location>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<folder location>* is the directory path to the folder where the extracted access profiles are stored, for example:

C: \MyAccessProfiles

NOTE: If you do not specify the drive letter, then the folder is created at the root of the directory where the Oracle Migration Tool On Demand client is installed.

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Access Profiles to a Specific Location

The following is an example of extracting all access profiles from your Oracle CRM On Demand server to a specific folder:

```
migrationtool -u <userID> -s <server URL> ReadAll AccessProfile  
"C: \MyAccessProfiles"
```

Updating or Inserting an Access Profile (Upsert)

This topic describes how to update a specific access profile (if it exists), or insert that access profile (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production). For the purposes of the Oracle Migration Tool On Demand client, this is known as an *upsert operation*. It is specified using the Upsert command.

An update to an access profile is derived from the access profile system name. That is, if you run an upsert operation on an access profile where the access profile system name in the XML file is *My Access Profile*, and an access profile of the same name exists in the target company, the target access profile is updated. If the access profile does not exist on the target company, then the access profile is inserted on the target. The matching of the access profile name is also case sensitive. For example, if the access profile system name in the XML file is *MY Access Profile* and the target access profile is *My Access Profile* (no capital Y), the *MY Access Profile* is inserted in the target.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific access profile (if it exists) or insert the access profile (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert AccessProfile <Access Profile XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Access Profile XML>* is the fully qualified path name of the access profile XML file, for example:

C:\My Files\My Profile.xml

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting an Access Profile

The following is an example of updating a specific access profile (if it exists) or inserting that access profile (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert AccessProfile  
"C:\My Files\My Profile.xml"
```

NOTE: Quotation marks are required only if the name consists of spaces.

4

Migrating Action Bar Layouts

This chapter describes how to migrate Action bar layouts using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Action Bar Layouts on page 35](#)
- [Privileges Required on page 36](#)
- [Elements and Sections in the Action Bar Layout XML Output File on page 36](#)
- [Migrating Action Bar Layouts on page 38](#)

Action Bar Layouts

An *Action bar layout* is the arrangement of the Action bar components, which appear on the left side of all Oracle CRM On Demand pages. Components typically include sections, such as the following: the Message Center, Search, Communication Tools, Create, Recently Viewed, Favorite Records, Favorite Lists, and Calendar.

[Table 10](#) describes the Oracle Migration Tool On Demand client commands used with Action bar layouts. For more information on running these commands, see [Migrating Action Bar Layouts on page 38](#).

Table 10. Commands Used with Action Bar Layouts in Oracle Migration Tool On Demand

Command	Description
ReadAll Acti onBarLayout	This command exports all Action bar layouts for all objects.
Upsert Acti onBarLayout <path of XML file/xml file name>	<p>This command updates or inserts an Action bar layout, as required.</p> <p>NOTE: The matching criteria for an update to occur are derived from the value between the <code><ns1:LayoutName></ns1:LayoutName></code> element. The matching criteria are case-sensitive. For example, <code><ns1:LayoutName>My Custom Action Bar Layout</ns1:LayoutName></code> and <code><ns1:LayoutName>MY Custom Action Bar Layout</ns1:LayoutName></code> are considered two different layouts (because the first layout name contains <i>My</i>, while the second layout name contains <i>MY</i>).</p>

Privileges Required

The following privileges are required for the user account running the ReadAll and Upsert commands:

- Enable Web Services Access
- Customize Application

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Action Bar Layout XML Output File

Table 11 describes the elements and sections of the Action bar layout XML output file.

Table 11. Elements and Sections in Action Bar Layout XML File

Element or Section Name	Description
<code><ns1:LayoutName>My Custom Action Bar Layout</ns1:LayoutName></code>	This element contains the system name of the Action bar layout.
<code><ns1:Description>Custom Action Bar Layout Description</ns1:Description></code>	This element contains the description information for the Action bar layout.

Table 11. Elements and Sections in Action Bar Layout XML File

Element or Section Name	Description
<pre> <ns1:ListOfSections> <ns1:Section> <ns1:Name>Global Search Multi Field</ns1:Name> <ns1:Displayed>true</ns1:Displayed> <ns1:Sequence>-2</ns1:Sequence> </ns1:Section> <ns1:Section> <ns1:Name>Quick Message Center</ns1:Name> <ns1:Displayed>true</ns1:Displayed> <ns1:Sequence>-2</ns1:Sequence> </ns1:Section> <ns1:Section> <ns1:Name>Calendar Action Applet</ns1:Name> <ns1:Displayed>false</ns1:Displayed> <ns1:Sequence>-1</ns1:Sequence> </ns1:Section> <ns1:Section> <ns1:Name>Quick Favorite Lists</ns1:Name> <ns1:Displayed>true</ns1:Displayed> <ns1:Sequence>3</ns1:Sequence> </ns1:Section> <ns1:Section> <ns1:Name>Quick History</ns1:Name> <ns1:Displayed>true</ns1:Displayed> <ns1:Sequence>1</ns1:Sequence> </ns1:Section> <ns1:Section> <ns1:Name>Quick Favorite Records</ns1:Name> <ns1:Displayed>true</ns1:Displayed> <ns1:Sequence>2</ns1:Sequence> </ns1:Section> <ns1:Section> <ns1:Name>Quick Create</ns1:Name> <ns1:Displayed>true</ns1:Displayed> <ns1:Sequence>0</ns1:Sequence> </ns1:Section> </ns1:ListOfSections> </pre>	<p>This section describes the contents of the Action Bar and the order in which they are displayed:</p> <ul style="list-style-type: none"> ■ A value of -2 indicates that the contents are in the Not Available section. ■ A value of -1 indicates that the contents are in the Available section. ■ Positive integers (for example, 0, 1, 2, 3, and so on) indicate that the contents are in the Displayed section, and the value indicates the location of the content, with 0 (zero) meaning the content is located at the top of the section.

Name Element Value to UI Value Mapping for Applets

Table 12 maps the <Name> element values in the XML to the values in the Oracle CRM On Demand UI for the preconfigured applets. See Table 11 for more information on the <Name> element.

Table 12. Name Element Value to UI Value Mapping for Oracle CRM On Demand Applets

Name Element Value in XML File	UI Value
Calendar Action Applet	Calendar
Global Search Multi Field	Search

Table 12. Name Element Value to UI Value Mapping for Oracle CRM On Demand Applets

Name Element Value in XML File	UI Value
Quick Create	Create
Quick Favorite Lists	Favorite Lists
Quick Favorite Records	Favorite Records
Quick History	Recently Viewed
Quick Message Center	Message Center

Migrating Action Bar Layouts

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate Action bar layouts:

- [Extracting All Action Bar Layouts on page 38](#)
- [Updating or Inserting an Action Bar Layout \(Upsert\) on page 39](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting All Action Bar Layouts

This topic describes how to extract all Action bar layouts from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all Action bar layouts:

```
mi grati ontool -u <userID> -s <server URL> ReadAll Acti onBarLayout
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Action Bar Layouts

The following is an example of extracting all Action bar layouts from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll ActionBarLayout
```

Updating or Inserting an Action Bar Layout (Upsert)

This topic describes how to update an Action bar layout (if it exists) or insert a custom Action bar layout (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update an Action bar layout (if it exists) or insert an Action bar layout (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert ActionBarLayout
    <Action Bar Layout XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands, for example, CompanyABC/jdoe.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides, for example, <https://secure-ausomx<abc>.crmondemand.com>, where *abc* is the tenant where your company resides.
- *<Action Bar Layout XML>* is the fully qualified path name of the Action bar layout XML file, for example:

```
C:\My Files\MyActionBarLayout.xml
```

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting an Action Bar Layout

The following is an example of updating an Action bar layout (if it exists) or inserting the action bar layout (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert ActionBarLayout
    "C:\My Files\MyActionBarLayout.xml "
```

NOTE: Quotation marks are required only if the name contains spaces.

5

Migrating Cascading Picklists

This chapter describes how to migrate cascading picklists using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Cascading Picklists on page 41](#)
- [Privileges Required on page 41](#)
- [Elements and Sections of the Cascading Picklist XML Output File on page 42](#)
- [Migrating Cascading Picklists on page 43](#)

Cascading Picklists

Cascading picklists restrict the values of a picklist, which is the related picklist. The cascading picklist is derived from the value selected in another picklist, which is the parent picklist.

[Table 13](#) describes the Oracle Migration Tool On Demand client commands used with cascading picklists. For more information on running these commands, see [Migrating Cascading Picklists on page 43](#).

Table 13. Oracle Migration Tool On Demand Commands for Cascading Picklists

Command	Description
Read CascadingPicklist <Object's System Name>	This command exports the values for a cascading picklist derived from the system name of an object. The values for <Object's System Name> are listed in System Names for Record Types on page 201 .
ReadAll CascadingPicklist	This command exports all cascading picklists.
Upsert CascadingPicklist <CascadingPicklist XML>	This command updates or inserts a cascading picklist, as required.

NOTE: The Read operation for cascading picklists reads all cascading picklists for the object name provided. The ReadAll operation for cascading picklists reads all the cascading picklists from all the objects set up for the user running the Oracle Migration Tool On Demand client.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

Cascading picklists must be supported by the object.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections of the Cascading Picklist XML Output File

Table 14 describes the elements of the cascading picklist XML output file.

Table 14. Elements of Cascading Picklist XML File

Element Name	Description
<ns1:ObjectName>	This element contains the object that is being referenced.
<ns1:ListOfCascadingPicklist>	This element contains all the cascading picklist definitions for the object name.

Table 15 describes the sections of the cascading picklist XML file and the values.

Table 15. Sections of Cascading Picklist XML File

Section Name	Description
<code><ns1:CascadingPicklist></code> <code><ns1:ParentPicklist>OrganizationRelationship</code> <code></ns1:ParentPicklist></code> <code><ns1:RelatedPicklist>Region</ns1:RelatedPicklist></code> <code><ns1:Description></ns1:Description></code> <code><ns1:ListOfPicklistValueAssociations></code> <code><ns1:PicklistValueAssociations></code> <code><ns1:ParentPicklistValue>IHN</ns1:ParentPicklistValue></code> <code><ns1:RelatedPicklistValue>East</ns1:RelatedPicklistValue></code> <code><ns1:RelatedPicklistValue>West</ns1:RelatedPicklistValue></code> <code></ns1:PicklistValueAssociations></code> <code></ns1:ListOfPicklistValueAssociations></code> <code></ns1:CascadingPicklist></code>	<p>This section contains the values for a cascading picklist:</p> <ul style="list-style-type: none"> ■ <code><ns1:CascadingPicklist></code> is the starting point of where the cascading picklist definition begins. ■ <code><ns1:ParentPicklist></code> is the parent picklist that has been defined. ■ <code><ns1:RelatedPicklist></code> is the related picklist that has been defined. ■ <code><ns1:Description></code> is the description that has been defined. ■ <code><ns1:ListOfPicklistValueAssociations></code> contains all the associations for the given cascading picklist. ■ <code><ns1:PicklistValueAssociations></code> is the starting section for a single association for the given cascading picklist. ■ <code><ns1:ParentPicklistValue></code> is the parent picklist value for the given cascading picklist. ■ <code><ns1:RelatedPicklistValue></code> contains the related values for the parent picklist that has been defined.

Migrating Cascading Picklists

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to export cascading picklists:

- [Extracting the Cascading Picklists for all Picklist Fields for a Named Object](#)
- [Extracting Cascading Picklists for All Objects](#)
- [Updating or Inserting a Cascading Picklist \(Upsert\)](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting the Cascading Picklists for all Picklist Fields for a Named Object

This topic describes how to extract cascading picklists from your Oracle CRM On Demand server for your environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all cascading picklists for an object:

```
migrationtool -u <userID> -s <server URL> Read CascadingPicklist <object name>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<object name>* is the name of the object for which you are extracting the cascading picklist, for example, Account. A complete set of object names is listed in [System Names for Record Types on page 201](#).

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting the Cascading Picklists for all Picklist Fields for a Named Object

The following is an example of extracting all the picklist values for the Account object:

```
migrationtool -u <userID> -s <server URL> Read CascadingPicklist Account
```

NOTE: Quotation marks are required only if the object name contains spaces.

Extracting Cascading Picklists for All Objects

This topic describes how to extract all the cascading picklists from your Oracle CRM On Demand environment (customer test environment or production) for all objects set up for the user who is running the command.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all cascading picklists for all objects set up for the user running the command:

```
migrationtool -u <userID> -s <server URL> ReadAll CascadingPicklist
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting Cascading Picklists for All Objects

The following is an example of extracting all cascading picklists for all objects that you have set up on your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll CascadingPicklist
```

Updating or Inserting a Cascading Picklist (Upsert)

This topic describes how to update a specific cascading picklist (if it exists), or insert that cascading picklist (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production). For the purposes of the Oracle Migration Tool On Demand client, this is known as an *upsert operation*. It is specified using the Upsert command.

An update to a cascading picklist is derived from the cascading picklist system name. That is, if you run an upsert operation on a cascading picklist where the cascading picklist system name in the XML file is *My CascadePickList*, and a cascading picklist of the same name exists in the target company, the target cascading picklist is updated. If the cascading picklist does not exist on the target company, then the cascading picklist is inserted on the target. The matching of the cascading picklist name is also case sensitive. For example, if the cascading picklist system name in the XML file is *MY CascadePickList* and the target access profile is *My CascadePickList* (no capital Y), the *MY CascadPickList* is inserted in the target.

An upsert operation on a cascading picklist fails if the following conditions occur:

- The parent picklist is the same as a related picklist because looping cascades are not allowed.
- The parent or related picklist references a field that does not exist on the target system.
- The parent or related picklist references a field that is not of type Picklist.
- The related picklist references a parent picklist that is referenced by another related picklist, because multiple parents for one picklist are not allowed.

The Enable Web Services Access and Customize Application privileges are required for an upsert operation on a cascading picklist.

NOTE: Related picklist values override the existing picklist values during an upsert operation.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific cascading picklist (if it exists) or insert the cascading picklist (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert CascadingPicklist  
<CascadingPicklist XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<CascadingPicklist XML>* is the fully qualified path name of the cascading picklist XML file, for example:

```
C:\My Files\My CascadingPicklist.xml
```

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Cascading Picklist

The following is an example of updating a specific cascading picklist (if it exists) or inserting that cascading picklist (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert CascadingPicklist  
"C:\My Files\My CascadingPicklist.xml"
```

NOTE: Quotation marks are required only if the name consists of spaces.

6

Migrating Custom Record Types

This chapter describes how to migrate custom record types using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Custom Record Types on page 47](#)
- [Privileges Required on page 47](#)
- [Custom Record Types XML Output File on page 48](#)
- [Using Oracle Migration Tool On Demand to Migrate Custom Record Types on page 49](#)

Custom Record Types

Custom record types allow you to change the display name and associated icons for various objects. These changes are reflected in most areas of the user interface. [Table 16](#) describes the Oracle Migration Tool On Demand client commands used with custom record types. For more information on running these commands, see [Using Oracle Migration Tool On Demand to Migrate Custom Record Types on page 49](#).

Table 16. Oracle Migration Tool On Demand Commands for Custom Record Types

Command	Description
Read CustomRecordType <i><Object's System Name></i>	This command exports a set of fields that is derived from the system name of the object. The values for <i><Object's System Name></i> are listed in System Names for Record Types on page 201 .
ReadAll CustomRecordType	This command exports all fields demarcated by the object name.
Upsert CustomRecordType <i><path of XML file/xml file name></i>	This command updates or inserts a set of fields in a particular object.

NOTE: Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll command: Enable Web Services Access.

- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Custom Record Types XML Output File

[Table 17](#) describes the elements and sections of the Field Management XML output file for custom record types.

Table 17. Description of Custom Record Types XML File Elements and Sections

Element or Section Name	Description
<code><ns1: IncludeAll>true</ns1: IncludeAll></code>	This element specifies whether all configuration information is returned for an object, in addition to the customized configuration information. If it is set to true, then all configuration information is returned. The default setting is false.
<code><ns1: Name></code>	This element contains the system name of the object that is being referenced.
<code><ns1: IconName>1801.gif</ns1: IconName></code>	This element contains the file name of the icon used by the referenced object. For the list of available icon file names, see Icons for Custom Record Types on page 189 .

Table 17. Description of Custom Record Types XML File Elements and Sections

Element or Section Name	Description
<code><ns1:ListOfCustomRecordTypeTranslations></code> <code><ns1:CustomRecordTypeTranslation></code> <code><ns1:LanguageCode>ENU</ns1:LanguageCode></code> <code><ns1:SingularName>Account</ns1:SingularName></code> <code><ns1:PluralName>Accounts</ns1:PluralName></code> <code><ns1:ShortName>Acct</ns1:ShortName></code> <code></ns1:CustomRecordTypeTranslation></code> <code></ns1:ListOfCustomRecordTypeTranslations></code>	<p>This section indicates the singular name, the plural name, and the short name that is displayed for the language code.</p> <p>In this example, for English-American (ENU), the singular name is <i>Account</i>, the plural name is <i>Accounts</i>, and the short name is <i>Acct Validation</i>. For the list of language codes, see Language Codes and Their Corresponding Language and Country on page 163.</p> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> 1 The translation definition, if it is defined. 2 The information contained in the <code><display name></code> tag if it is defined and if the translation definition is not defined. 3 The system name if the translation definition and the <code><display name></code> are not defined.

Using Oracle Migration Tool On Demand to Migrate Custom Record Types

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with custom record types:

- [Extracting the Custom Record Type for a Single Object on page 49](#)
- [Extracting All Customized Record Types on page 50](#)
- [Updating or Inserting a Custom Record Type \(Upsert\) on page 51](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting the Custom Record Type for a Single Object

This topic describes how to extract a custom record type for a single object from your Oracle CRM On Demand server for your environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract custom record types for a single object:

```
migrationtool -u <userID> -s <server URL> Read CustomRecordType  
  <system name of the object>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<system name of the object>* is the system name of the object whose custom record types you want to extract, for example, Account. A complete set of system names is listed in [System Names for Record Types on page 201](#).

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting the Custom Record Type for a Single Object

The following is an example of extracting the custom record types for the Account object:

```
migrationtool -u <userID> -s <server URL> Read CustomRecordType Account
```

NOTE: Quotation marks are required only if the system name contains spaces.

Extracting All Customized Record Types

This topic describes how to extract all customized record types from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all customized record types:

```
migrationtool -u <userID> -s <server URL> ReadAll CustomRecordType
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Customized Record Types

The following is an example of extracting all customized record types from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll CustomRecordType
```

Updating or Inserting a Custom Record Type (Upsert)

This topic describes how to update a custom record type (if it exists) or insert a custom record type (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a custom record type (if it exists) or insert a custom record type (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert CustomRecordType  
<Custom Record Type XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Custom Record Type XML>* is the fully qualified path name of the custom record type XML file, for example:

C:\My Files\MyAccount.xml

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Custom Record Type

The following is an example of updating an Account custom record type (if it exists) or inserting an Account custom record type (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert CustomRecordType "C:\My  
Files\MyAccount.xml "
```

NOTE: Quotation marks are required only if the name contains spaces.

7

Migrating Custom Web Applets

This chapter describes how to migrate custom Web applets by using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Custom Web Applets on page 53](#)
- [Privileges Required on page 54](#)
- [Elements and Sections in the Web Applet XML Output File on page 54](#)
- [Migrating Custom Web Applets on page 57](#)

Custom Web Applets

A *custom Web applet* is a program that embeds external Web content in Oracle CRM On Demand Home or Detail pages, Action bars, or home tabs. Typically, the Web content is embedded by creating a custom Web applet that is added to the page layout for a Homepage or Detail page. For more information, see the topics about custom Web applets in *Oracle CRM On Demand Online Help*.

[Table 18](#) describes the Oracle Migration Tool On Demand client commands used with custom Web applets. For more information on running these commands, see [Migrating Custom Web Applets on page 57](#).

Table 18. Commands Used with Custom Web Applets in Oracle Migration Tool On Demand

Command	Description
Read HomepageCustomWebApplet <Object Name> [<HomePageWebAppletName>]	<p>This command exports all the Homepage custom Web applets for a specified object, such as Account, or a specific Homepage custom Web applet for a specified object, where:</p> <ul style="list-style-type: none"> ■ <Object Name> is the specified record type. ■ <HomePageWebAppletName> is the name of a Homepage custom Web applet.
Read DetailPageCustomWebApplet <Object Name> [<DetailPageWebAppletName>]	<p>This command exports all the Detail page custom Web applets for a specified object, such as Account, or a specific Detail page custom Web applet for a specified object, where:</p> <ul style="list-style-type: none"> ■ <Object Name> is the specified record type. ■ <DetailPageWebAppletName> is the name of a Detail page custom Web applet.
Read ActionBarCustomWebApplet <ActionBarWebAppletName>	<p>This command exports the specified Action bar custom Web applet from Oracle CRM On Demand.</p>

Table 18. Commands Used with Custom Web Applets in Oracle Migration Tool On Demand

Command	Description
Read HomeTabCustomWebApplet <i><HomeTab Custom Web Applet Name></i>	This command exports the specified Homepage tab custom Web applet from Oracle CRM On Demand.
ReadAll <i><WebAppletType></i>	This command exports all custom Web applets of <i><WebAppletType></i> from Oracle CRM On Demand, where <i>WebAppletType</i> is one of the following: <ul style="list-style-type: none"> ■ HomepageCustomWebApplet ■ DetailPageCustomWebApplet ■ ActionBarCustomWebApplet ■ HomeTabCustomWebApplet
Upsert <i><WebAppletType></i> <i><Path of XML file/XML file name></i>	This command updates or inserts a custom Web applet into Oracle CRM On Demand, where <i>WebAppletType</i> is one of the following: <ul style="list-style-type: none"> ■ HomepageCustomWebApplet ■ DetailPageCustomWebApplet ■ ActionBarCustomWebApplet ■ HomeTabCustomWebApplet

NOTE: Nonadministrative Oracle CRM On Demand users can run the ReadAll command.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll command: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access, Manage Custom Web Applets, and Customize Application. In addition, Detail page custom Web applets and Homepage custom Web applets also require Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Web Applet XML Output File

The following topics describe the elements and sections for various workflow action sets:

- [Detail Page Custom Web Applets on page 55](#)

- [Action Bar Custom Web Applets on page 55](#)
- [Homepage Custom Web Applets on page 56](#)
- [Homepage Tab Custom Web Applets on page 57](#)

Detail Page Custom Web Applets

Table 19 describes the elements or sections in the Detail Page custom Web applet XML output file.

Table 19. XML File Elements of the Detail Page Custom Web Applet

Element or Section	Description
<pre><data: Obj ectName>Account</data: Obj ectName> <data: Di spl ayName>MyAppl et</data: Di spl ayName> <data: Descri pti on></data: Descri pti on> <data: Hei ght>700</data: Hei ght></pre>	This section contains the Detail page custom Web applet elements.
<pre><data: HTMLType> <data: HTMLHeader></data: HTMLHeader> <data: HTMLBody></data: HTMLBody> <data: Al waysRun>fal se</data: Al waysRun> </data: HTMLType></pre>	This section contains the elements for Detail page custom Web applets of type HTML.
<pre><data: FeedType> <data: URL></data: URL> <data: Overri deURLFI ag>fal se</data: Overri deURLFI ag> <data: TargetWi ndow>New Wi ndow</data: TargetWi ndow> </data: FeedType></pre>	This section contains the elements for Detail page custom Web applets of type Feed.
<pre><data: URLType> <data: URL></data: URL> <data: Al waysRun>fal se</data: Al waysRun> </data: URLType></pre>	This section contains the elements for Detail page Web applets of type URL.

Action Bar Custom Web Applets

Table 20 describes the elements or sections in the Action Bar custom Web applet XML output file.

Table 20. XML File Elements of the Action Bar Custom Web Applet

Element or Section	Description
<pre><data: Di spl ayName>Gl obal webappl et</data: Di spl ayName> <data: Descri pti on></data: Descri pti on> <data: Hei ght>200</data: Hei ght></pre>	This section contains the elements for the Action Bar custom Web applet.
<pre><data: HTMLType> <data: HTMLHeader></data: HTMLHeader> <data: HTMLBody> </data: HTMLBody> <data: Al waysRun>true</data: Al waysRun> </data: HTMLType></pre>	This section contains the elements for the Action Bar custom Web applets of type HTML.

Table 20. XML File Elements of the Action Bar Custom Web Applet

Element or Section	Description
<pre><data: FeedType> <data: URL>http://www.oracle.com</data: URL> <data: OverrideURLFlag>true</data: OverrideURLFlag> <data: TargetWindow>New Window</data: TargetWindow> </data: FeedType></pre>	This section contains the elements for the Action Bar custom Web applets of type Feed.
<pre><data: URLType> <data: URL>http://www.oracle.com</data: URL> <data: AlwaysRun>true</data: AlwaysRun> </data: URLType></pre>	This section contains the elements for the Action Bar custom Web Applets of type URL.

Homepage Custom Web Applets

Table 21 describes the elements or sections in the Homepage Custom Web Applet XML output file.

Table 21. XML File Elements of the Homepage Custom Web Applet

Element or Section	Description
<pre><data: ObjectName>Account</data: ObjectName> <data: DisplayName>AccountHomepageApplet</data: DisplayName> <data: Description>Account web applet</data: Description> <data: Width>1</data: Width> <data: Height>200</data: Height></pre>	This section describes the elements for a Homepage custom Web applet.
<pre><data: HTMLType> <data: HTMLHeader></data: HTMLHeader> <data: HTMLBody </data: HTMLBody> </data: HTMLType></pre>	This section describes the elements for the Homepage custom Web applets of type HTML.
<pre><data: FeedType> <data: URL></data: URL> <data: OverrideURLFlag>false</data: OverrideURLFlag> <data: TargetWindow>New Window</data: TargetWindow> </data: FeedType></pre>	This section describes the elements for the Homepage custom Web applets of type Feed.
<pre><data: URLType> <data: URL></data: URL> </data: URLType></pre>	This section describes the elements for the Homepage custom Web applets of type URL.

Homepage Tab Custom Web Applets

Table 22 describes the elements or sections in the Homepage tab custom Web applet XML output file.

Table 22. XML File Elements of the Homepage Tab Custom Web Applet

Element or Section	Description
<pre><data: DisplayName>Global WebApplet</data: DisplayName> <data: Description></data: Description> <data: Width>1</data: Width> <data: Height>200</data: Height></pre>	This section lists the elements for Homepage tab custom Web applets.
<pre><data: HTMLType> <data: HTMLHeader></data: HTMLHeader> <data: HTMLBody></data: HTMLBody> </data: HTMLType></pre>	This section lists the elements for Homepage tab custom Web applets of type HTML.
<pre><data: FeedType> <data: URL></data: URL> <data: OverrideURLFlag>false</data: OverrideURLFlag> <data: TargetWindow>New Window</data: TargetWindow> </data: FeedType></pre>	This section lists the elements for Homepage tab custom Web applets of type Feed.
<pre><data: URLType> <data: URL>http://www.oracle.com</data: URL> </data: URLType></pre>	This section lists the elements for Homepage tab custom Web applets of type URL.

Migrating Custom Web Applets

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate custom Web applets:

- [Extracting a Set of Custom Web Applets from an Object on page 57](#)
- [Extracting All Custom Web Applets on page 59](#)
- [Updating or Inserting a Custom Web Applet Definition \(Upsert\) on page 60](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting a Set of Custom Web Applets from an Object

This topic describes how to extract a set of custom Web applets from the Oracle CRM On Demand server for your environment (customer test environment or production) for a specified object.

NOTE: Users require the [Enable Web Services Access](#) privilege to run the Read operation. The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Syntax for Extracting Homepage Custom Web Applets

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web applets for Homepages of various record types:

```
migrationtool -u <userID> -s <server URL> Read HomepageCustomWebApplet  
  <ObjectName> [<HomePageWebAppletName>]
```

where:

- <userID> is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- <server URL> is the URL for the Oracle CRM On Demand server where your company resides.
- <ObjectName> is the object name or record type for which you want to read a set of custom Web applets, for example, Account.
- <HomePageWebAppletName> is the name of the Homepage custom Web applet that you want to extract. This parameter is optional.

Syntax for Extracting Detail Page Custom Web Applets

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web applets for Detail pages for various record types:

```
migrationtool -u <userID> -s <server URL> Read DetailPageCustomWebApplet  
  <ObjectName> [<DetailPageWebAppletName>]
```

where:

- <userID> is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- <server URL> is the URL for the Oracle CRM On Demand server where your company resides.
- <ObjectName> is the object name or record type for which you want to read a set of custom Web applets, for example, Account.
- <DetailPageWebAppletName> is the name of the Detail page custom Web applet that you want to extract. This parameter is optional.

Syntax for Extracting Action Bar Custom Web Applets

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web applets for Action bars:

```
migrationtool -u <userID> -s <server URL> Read ActionBarCustomWebApplet  
  [<ActionBarWebAppletName>]
```

where:

- <userID> is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- <server URL> is the URL for the Oracle CRM On Demand server where your company resides.

- `<ActionBarWebAppletName>` is the name of the Action bar custom Web applet that you want to extract. This parameter is optional.

Syntax for Extracting Homepage Tab Custom Web Applets

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web applets for Homepage tabs:

```
migrationtool -u <userID> -s <server URL> Read HomeTabCustomWebApplet
[<HomeTabWebAppletName>]
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.
- `<HomeTabWebAppletName>` is the name of the Homepage tab custom Web applet that you want to extract. This parameter is optional.

Example of Extracting a Set of Homepage Custom Web Applets

The following is an example of extracting a set of Homepage custom Web applets for the Account record:

```
migrationtool -u <userID> -s <server URL> Read HomepageCustomWebApplet Account
```

Extracting All Custom Web Applets

This topic describes how to extract all custom Web applets from your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

NOTE: The `Manage Custom Web Applets` privilege is required to run the `READALL` operation.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all custom Web applets from Oracle CRM On Demand Homepages, Detail pages, Action bars, and Homepage tabs:

```
migrationtool -u <userID> -s <server URL> ReadAll HomepageCustomWebApplet
migrationtool -u <userID> -s <server URL> ReadAll DetailPageCustomWebApplet
migrationtool -u <userID> -s <server URL> ReadAll ActionBarCustomWebApplet
migrationtool -u <userID> -s <server URL> ReadAll HomeTabCustomWebApplet
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

■ `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

The output from the Oracle Migration Tool On Demand client is located in the following directories:

```
<migration tool install>/repository/<WebAppletType>/<object>/<WebApplet.xml>
```

where:

■ `<WebAppletType>` is one of the supported custom Web applets:

- HomepageCustomWebApplet
- DetailPageCustomWebApplet
- ActionBarCustomWebApplet
- HomeTabCustomWebApplet

■ `<object>` is the Oracle CRM On Demand object or record, for example, Account.

■ `<WebApplet.xml>` is the series of XML files where the Web applet configuration data is stored, for example, first Web Applet.xml file, second Web Applet.xml file, and so on.

Example of Extracting All Custom Web Applets for Homepages

The following is an example of extracting all custom Web applets in all Homepages from your Oracle CRM On Demand server:

```
migrationtool -u <user/ID> -s <server URL> ReadAll HomepageCustomWebApplet
```

Updating or Inserting a Custom Web Applet Definition (Upsert)

This topic describes how to update a custom Web applet definition (if it exists) or insert the Web applet definition (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

NOTE: The Enable Web Services Access and Customize Application privileges are required to run the Upsert operation.

The configuration data is updated when the Web applet name exists in the target company for the object or record for which the upsert operation is being run; otherwise the Web applet is inserted.

Table 23 shows the result of an Upsert operation if the target company has a Web applet called *My Custom Applet* for the Account object on the Detail page.

Table 23. Result of an Upsert Operation on a Target Company

If the XML definition contains...	Then the result is ...
Name: My Custom Applet Object: Account Location: Detail Page	The existing My Custom Web Applet is updated for the Account object, which is on the Detail page.
Name: MY Custom Applet Object: Account Location: Detail Page	MY Custom Applet is inserted into the target company. The company now contains the following Account Web Applets: ■ My Custom Applet ■ MY Custom Applet
Name: My Custom Applet Object: Opportunity Location: Detail Page	My Custom Applet is inserted into the target company for the Opportunity object. The company now contains: ■ For the Account object: My Custom Applet ■ For the Opportunity object: My Custom Applet
Name: My Custom Applet Object: Global Location: Action Bar	My Custom Applet is inserted into the target company for the Global Web Applet section. The company now contains: ■ For the Account object: My Custom Applet ■ For the Global Web Applet section: My Custom Applet

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a custom Web applet (if it exists) or inserting the custom Web applet (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert <WebAppletType>
<MyWebApplet XML>
```

where:

- <userID> is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- <server URL> is the URL for the Oracle CRM On Demand server where your company resides.
- <WebAppletType> is one of the supported custom Web applets:
 - HomepageCustomWebApplet
 - DetailPageCustomWebApplet
 - ActionBarCustomWebApplet
 - HomeTabCustomWebApplet

- *<MyWebApplet XML>* is the fully qualified path name of the customized Web applet XML file, for example:

C:\My Files\MyWebApplet.xml

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Examples of Updating or Inserting a Custom Web Applet

The following are examples of updating a custom Web applet (if it exists) or inserting the Web applet (if it does not exist) in your Oracle CRM On Demand server:

- For Homepage custom Web applets:

```
migrationtool -u <userID> -s <server URL> Upsert HomepageCustomWebApplet  
"C:\My Files\MyHomepageCustomWebApplet.xml "
```

- For Detail page custom Web applets:

```
migrationtool -u <userID> -s <server URL> Upsert DetailPageCustomWebApplet  
"C:\My Files\MyDetailPageCustomWebApplet.xml "
```

- For Action bar custom Web applets:

```
migrationtool -u <userID> -s <server URL> Upsert ActionBarCustomWebApplet  
"C:\My Files\MyActionBarCustomWebApplet.xml "
```

- For Homepage tab custom Web applets:

```
migrationtool -u <userID> -s <server URL> Upsert HomeTabCustomWebApplet  
"C:\My Files\MyHomeTabCustomWebApplet.xml "
```

NOTE: Quotation marks are required if the file name or path contains spaces.

8

Migrating Custom Web Link Fields

This chapter describes how to migrate custom Web link fields using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Custom Web Link Fields on page 63](#)
- [Privileges Required on page 63](#)
- [Elements and Sections in the Custom Web Links XML Output File on page 64](#)
- [Migrating Custom Web Link Fields on page 65](#)

Custom Web Link Fields

Custom Web link fields allow you to create context-sensitive hyperlinks in your page layouts. [Table 24](#) describes the Oracle Migration Tool On Demand client commands used with custom Web link fields. For more information on running these commands, see [Migrating Custom Web Link Fields on page 65](#).

Table 24. Commands Used with Custom Web Link Fields in Oracle Migration Tool On Demand

Command	Description
Read CustomWebLink <System Name>	This command exports all custom Web link fields for a specific object (for example, Account) derived from the record's system name.
ReadAll CustomWebLink	This command exports all custom Web link fields for all objects.
Upsert CustomWebLink <path of XML file/xml file name>	This command updates or inserts a custom Web link, as required.

Privileges Required

The following privileges are required for the user account running the Read, ReadAll, and Upsert commands:

- Enable Web Services Access
- Customize Application
- Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Custom Web Links XML Output File

Table 25 describes the elements and sections of the custom Web links XML output file.

Table 25. Elements and Sections in Custom Web Links XML File

Element or Section Name	Description
<code><ns1:ObjectName>Account</ns1:ObjectName></code>	This element contains the system name of the object, for example, Account.
<code><ns1:Name>MyWebLink</ns1:Name></code>	This element contains the system name of the custom Web link.
<code><ns1:IntegrationTag>My_Web_Link</ns1:IntegrationTag></code>	This element contains the custom language-independent symbolic identifier for the custom Web link.
<code><ns1:DisplayText>MyDisplayText</ns1:DisplayText></code>	This element contains the display text information for the custom Web link.
<code><ns1:WebLinkTarget>Open in Custom Tab</ns1:WebLinkTarget></code>	<p>This element specifies the Web link target information for the custom Web link. This element can have the following values:</p> <ul style="list-style-type: none">■ Open in Current window. In the UI, this element opens the link in the current window.■ Open in New window. In the UI, this element opens the link in a new window.■ Open in Custom Tab. In the UI, this element opens the link in a custom tab.
<code><ns1:TargetCustomWebTab>MyCustomWebTab</ns1:TargetCustomWebTab></code>	This element specifies the custom Web link to which the Web link navigates when it is clicked. This element is applicable only when the <code><WebLinkTarget></code> element has a value of: Open in Custom Tab.
<code><ns1:RefreshParentWindow>false</ns1:RefreshParentWindow></code>	This element specifies the Refresh Parent Window value (True or False) for the custom Web link, if the <code><WebLinkTarget></code> element has a value of: Open in New Window.

Table 25. Elements and Sections in Custom Web Links XML File

Element or Section Name	Description
<code><ns1:DisplayOptions>B</ns1:DisplayOptions></code>	<p>This element specifies the Display Option value for the custom Web link. This element can have the following values:</p> <ul style="list-style-type: none"> ■ D. Represents a Detail page ■ E. Represents an Edit page ■ B. Represents both a Detail page and an Edit page
<code><ns1:ActiveLinkCondition>TRUE</ns1:ActiveLinkCondition></code>	This element specifies the active link condition value for the custom Web link.
<code><ns1:DisplayLinkCondition>TRUE</ns1:DisplayLinkCondition></code>	This element specifies the display link condition value for the custom Web link.
<code><ns1:URL>http://www.someURL.com</ns1:URL></code>	This element specifies the URL value for the custom Web link.
<code><ns1:ListOfWebLinkTranslations></code> <code> <ns1:WebLinkTranslation></code> <code> <ns1:DisplayName>MyWebLink</ns1:DisplayName></code> <code> <ns1:DisplayText>Click on me.</ns1:DisplayText></code> <code> <ns1:LangCode>ENU</ns1:LangCode></code> <code> </ns1:WebLinkTranslation></code> <code></ns1:ListOfWebLinkTranslations></code>	This section describes the values for the supported languages.

Migrating Custom Web Link Fields

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate custom Web link fields:

- [Extracting a Set of Custom Web Link Fields for an Object on page 65](#)
- [Extracting Custom Web Link Fields for All Objects on page 66](#)
- [Updating or Inserting a Custom Web Link Field \(Upsert\) on page 67](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting a Set of Custom Web Link Fields for an Object

This topic describes how to extract a set of custom Web link fields for a specific object (for example, the Account object) from your Oracle CRM On Demand server for your environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web link fields:

```
migrationtool -u <userID> -s <server URL> Read CustomWebLink  
  <system name of the object>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<system name of the object>* is the system name of the object for which you extract all custom Web links fields, for example, Account.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting a Set of Custom Web Link Fields for an Object

The following is an example of extracting a set of custom Web link fields for an object:

```
migrationtool -u <userID> -s <server URL> Read CustomWebLink "Account"
```

NOTE: Quotation marks are required only if the name of the custom Web link contains spaces.

Extracting Custom Web Link Fields for All Objects

This topic describes how to extract all custom Web link fields from your Oracle CRM On Demand environment (customer test environment or production) for all objects.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all custom Web link fields for all objects:

```
migrationtool -u <userID> -s <server URL> ReadAll CustomWebLink
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

Example of Extracting All Custom Web Link Fields

The following is an example of extracting all custom Web link fields from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll CustomWebLink
```

Updating or Inserting a Custom Web Link Field (Upsert)

This topic describes how to update custom Web link fields (if they exist) or insert custom Web link fields (if they do not exist) on your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update custom Web link fields (if they exist) or insert custom Web link fields (if they do not exist):

```
migrationtool -u <userID> -s <server URL> Upsert CustomWebLink <Custom Web Link XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Custom Web Link XML>* is the fully qualified path name of the custom Web link XML file, for example:

```
C:\My Files\MyCustomWebLink.xml
```

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting Custom Web Link Fields

The following is an example of updating custom Web link fields (if they exist) or inserting custom Web link fields (if they do not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert CustomWebLink
"C:\My Files\MyCustomWebLink.xml "
```

NOTE: Quotation marks are required only if the name contains spaces.

9

Migrating Custom Web Tabs

This chapter describes how to migrate custom Web tabs using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Custom Web Tabs on page 69](#)
- [Privileges Required on page 69](#)
- [Elements and Sections in the Custom Web Tabs XML Output File on page 70](#)
- [Migrating Custom Web Tabs on page 71](#)

Custom Web Tabs

Custom Web tabs allow you to create customized Web tabs in Oracle CRM On Demand. [Table 26](#) describes the Oracle Migration Tool On Demand client commands used with custom Web tabs. For more information on running these commands, see [Migrating Custom Web Tabs on page 71](#).

Table 26. Commands Used with Custom Web Tabs in Oracle Migration Tool On Demand

Command	Description
Read CustomWebTab <System Name>	This command exports a single custom Web tab, derived from the custom Web tab's system name. The generated <System Name> is derived from the custom Web tab name provided by user.
ReadAll CustomWebTab	This command exports all custom Web tabs.
Upsert CustomWebTab <path of XML file/xml file name>	This command updates or inserts a custom Web tab, as required.
Delete CustomWebTab <System Name>	This command deletes a single custom Web tab derived from the custom Web tab's system name. The generated <System Name> is derived from the custom Web tab name provided by a user.

Privileges Required

The following privileges are required for the user account running the Read, ReadAll, Upsert, and Delete commands:

- Enable Web Services Access
- Customize Application

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Custom Web Tabs XML Output File

Table 27 describes the elements and sections of the Custom Web Tabs XML output file.

Table 27. Elements and Sections in Custom Web Tabs XML File

Element or Section Name	Description
<code><ns2: DisplayName>test</ns2: DisplayName></code>	This element contains the system name of the custom Web tab that is being referenced.
<code><ns2: Description></ns2: Description></code>	This element contains the description for the custom Web tab.
<code><ns2: Type></ns2: Type></code>	This element defines the content of the custom Web applet (either URL or HTML).
<code><ns2: HTMLHeadAdditions></ns2: HTMLHeadAdditions></code>	This element specifies the HTML code that is included in the source of a rendered Oracle CRM On Demand Web page in the <code><head></code> tags at the top of the page.
<code><ns2: WebTabHTML></ns2: WebTabHTML></code>	This element specifies the HTML code that is rendered in a custom Web tab.
<code><ns2: Url></ns2: Url></code>	This element contains the URL information for the custom Web tab.
<code><ns2: FrameHeight></ns2: FrameHeight></code>	This element specifies the frame height of the custom Web tab.
<code><ns2: FrameWidth></ns2: FrameWidth></code>	This element specifies the frame width of the custom Web tab.
<code><ns2: IconName>icon_custtab.gif</ns2: IconName></code>	This element contains the icon used for this custom Web tab. In this example, <code>icon_custtab.gif</code> is the graphic file that is used.

Table 27. Elements and Sections in Custom Web Tabs XML File

Element or Section Name	Description
<pre><ns2:ListOfCustomWebTabTranslations> <ns2:CustomWebTabTranslation> <ns2:LanguageCode>ENU</ns2:LanguageCode> <ns2:DisplayName>My Custom Web Tab</ns2:DisplayName> </ns2:CustomWebTabTranslation> </ns2:ListOfCustomWebTabTranslations></pre>	<p>This section contains the display name for the language code. In this example, for English-American (ENU), the display name is <i>My Custom Web tab</i>.</p> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> 1 The translation definition, if it is defined. 2 The information contained in the <display name> tag if it is defined and if the translation definition is not defined. 3 The system name, if the translation definition and the <display name> are not defined.

Migrating Custom Web Tabs

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate custom Web tabs:

- [Extracting a Single Custom Web Tab on page 71](#)
- [Extracting All Custom Web Tabs on page 72](#)
- [Updating or Inserting a Custom Web Tab \(Upsert\) on page 73](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting a Single Custom Web Tab

This topic describes how to extract a custom Web tab from your Oracle CRM On Demand server for your environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a custom Web tab:

```
migrationtool -u <userID> -s <server URL> Read CustomWebTab
<system name of the Custom Web tab>
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.
- `<system name of the Custom Web tab>` is the system name of the Custom Web tab that you want to extract, for example, My Custom Web Tab.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting a Single Custom Web Tab

The following is an example of extracting a single custom Web tab:

```
migrationtool -u <userID> -s <server URL> Read CustomWebTab "My Custom Web Tab"
```

NOTE: Quotation marks are required only if the name of the custom Web tab contains spaces.

Extracting All Custom Web Tabs

This topic describes how to extract all custom Web tabs from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all customized record types:

```
migrationtool -u <userID> -s <server URL> ReadAll CustomWebTab
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Custom Web Tabs

The following is an example of extracting all custom Web tabs from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll CustomWebTab
```


Updating or Inserting a Custom Web Tab (Upsert)

This topic describes how to update a custom Web tab (if it exists) or insert a custom record type (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a custom Web tab (if it exists) or insert a custom record type (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert CustomWebTab <Custom Web Tab XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Custom Web Tab XML>* is the fully qualified path name of the custom Web tab XML file, for example:

```
C:\My Files\MyCustomWebTab.xml
```

Example of Updating or Inserting a Custom Web Tab

The following is an example of updating a custom Web tab (if it exists) or inserting the custom Web tab (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert CustomWebTab  
"C:\My Files\MyCustomWebTab.xml "
```

NOTE: Quotation marks are required only if the name contains spaces.

Deleting a Single Custom Web Tab

This topic describes how to delete a custom Web tab from your Oracle CRM On Demand server for your environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to delete a custom Web tab:

```
migrationtool -u <userID> -s <server URL> Delete CustomWebTab  
<system name of the Custom Web tab>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<system name of the Custom Web tab>* is the system name of the custom Web tab that you want to delete, for example, My Custom Web Tab.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Deleting a Single Custom Web Tab

The following is an example of deleting a single custom Web tab:

```
mi grationtool -u <user/ID> -s <server URL> Delete CustomWebTab "My Custom Web Tab"
```

NOTE: Quotation marks are required only if the name of the custom Web tab contains spaces.

10 Migrating Custom Fields

This chapter describes how to migrate custom fields using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Commands Used with Fields in the Field Management Section on page 75](#)
- [Privileges Required on page 76](#)
- [Elements and Sections in the Field Management XML Output File on page 76](#)
- [Migrating Custom Fields on page 79](#)

Commands Used with Fields in the Field Management Section

Fields refer to all items under the Field Management section in the Oracle CRM On Demand user interface. Each object has its own set of fields that are derived from the functionality of the fields. [Table 28](#) describes the Oracle Migration Tool On Demand client commands used with fields. For more information on running these commands, see [Migrating Custom Fields on page 79](#).

Table 28. Commands Used with Fields in the Oracle Migration Tool On Demand Client

Command	Description
Read FieldManagement <System Name>	This command exports a set of fields derived from the object's system name. The values for <System Name> are listed in System Names for Record Types on page 201 .
ReadAll FieldManagement	This command exports all fields separated by the object name.
Upsert FieldManagement <path of XML file/xml file name>	This command updates or inserts a set of fields in a particular object, as required.
Create FieldManagement <path of XML file/xml file name>	This command creates a new set of fields on a particular object from the contents of an XML file you create manually that contains the new field definitions, rather than extracting the definition from a company.

The Read and ReadAll commands extract only the field definitions for fields that have been created by a user or preconfigured fields that have been modified. Unmodified preconfigured fields are bypassed because they exist on all company tenants by default. An object with unmodified preconfigured fields or without any newly created fields contains an empty XML file.

If you are extracting field management from a source Oracle CRM On Demand environment, then regardless of whether the fields exist in the target Oracle CRM On Demand environment or not, use the Upsert command. If you are manually creating the field definitions and not extracting them from another source Oracle CRM On Demand environment, use the Create command.

All system names are listed in [System Names for Record Types on page 201](#). You might not have certain objects available depending on how your company is set up, so some of the system names that are listed might not exist for your company.

NOTE: Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert and Create commands: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Field Management XML Output File

[Table 29](#) describes the elements of the Field Management XML output file.

Table 29. Description of the Field Management XML File Elements

Element	Description
<code><ns1:IncludeAll>true</ns1:IncludeAll></code>	This element specifies whether all configuration information is returned for an object, in addition to the customized configuration information. If it is set to true, then all configuration information is returned. The default is false.
<code><ns1:ObjectName></code>	This element contains the object's section that is being referenced. This element never changes.
<code><ns1:ListOfFields></code>	This element contains all the customized field definitions for the object name.
<code><ns1:GenericIntegrationTag>CustomText30</ns1:GenericIntegrationTag></code>	This element is the default integration tag assigned to the field by Oracle CRM On Demand. This tag cannot be modified by Oracle CRM On Demand users.

Table 29. Description of the Field Management XML File Elements

Element	Description
<code><ns1: IntegrationTag> stMy_Custom_Field </ns1: IntegrationTag></code>	<p>This element is the custom integration tag name of the field. This tag can be modified by Oracle CRM On Demand users. The default Integration Tag is of the format:</p> <p style="text-align: center;"><code>fieldtypeDisplay_Name</code></p> <p>That is, <code>stMy_Custom_Field</code> is assigned to a custom field of type Text (Short) with the Display Name value of: My Custom Field.</p>

NOTE: For non-custom fields, the `<GenericIntegrationTag>` and the `<IntegrationTag>` values are the same.

Table 30 describes the sections of the Field Management XML file.

Table 30. Description of the Field Management XML File Sections

Sections	Field Element Description
<code><ns1:Field></code> <code><ns1:Name>Account Contact Role</ns1:Name></code> <code><ns1:DisplayName>Account Roles</ns1:DisplayName></code> <code><ns1:FieldType>Text</ns1:FieldType></code> <code><ns1:IntegrationTag>Account_Contact_Role</ns1:IntegrationTag></code> <code><ns1:Required>false</ns1:Required></code> <code><ns1:ReadOnly>false</ns1:ReadOnly></code> <code><ns1:DefaultValue></ns1:DefaultValue></code> <code><ns1:FieldValidation></ns1:FieldValidation></code> <code><ns1:PostDefault>false</ns1:PostDefault></code> <code><ns1:ValidationErrorMessage></ns1:ValidationErrorMessage></code>	<ul style="list-style-type: none"> ■ <code><ns1:Name></code> is the system name of the field, which never changes. ■ <code><ns1:DisplayName></code> is the name in the user interface to use if no Translation Display Names are provided. ■ <code><ns1:FieldType></code> is the type of field. ■ <code><ns1:IntegrationTag></code> is the Integration Tag name of the field. ■ <code><ns1:Required></code> determines if the field is a required field (true), or if it is not a required field (false). ■ <code><ns1:ReadOnly></code> determines if the field is a read-only field (true) or if it is not a read-only field (false). ■ <code><ns1:DefaultValue></code> is the default value of the field. ■ <code><ns1:FieldValidation></ns1:FieldValidation></code> contains the validation rules for the custom field. ■ <code><ns1:PostDefault>false</ns1:PostDefault></code> is the value assigned to the field when the record is saved. It is set to false if the user leaves the field blank, or the field is hidden from the layout, or a value has not been supplied by the integration tools. ■ <code><ns1:ValidationErrorMessage></ns1:ValidationErrorMessage></code> contains the error message displayed when a validation rule fails.

Table 30. Description of the Field Management XML File Sections

Sections	Field Element Description
<pre> <ns1:ListOfFieldTranslations> <ns1:FieldTranslation> <ns1:LanguageCode>ENU</ns1:LanguageCode> <ns1:DisplayName>Roles</ns1:DisplayName> <ns1:ValidationErrorMessage></ ns1:ValidationErrorMessage> </ns1:FieldTranslation> </ns1:ListOfFieldTranslations> </pre>	<p>This section indicates the Display Name and Validation Error Message that are displayed for the language code. In this example, for English-American (ENU), the display name is <i>Roles</i>, and the Validation Error Message is not set. For the list of language codes, see Language Codes and Their Corresponding Language and Country on page 163.</p> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> 1 The translation definition if it is defined. 2 The information contained in the <display name> tag if it is defined, and if the translation definition is not defined. 3 The system name, if the translation definition and the <display name> are not defined.
<pre> <ns1:Field> <ns1:Name>WEBLINK_002</ns1:Name> <ns1:DisplayName>My Custom Web Link</ ns1:DisplayName> <ns1:FieldType>Web Link</ns1:FieldType> <ns1:IntegrationTag>My_Custom_Web_Link</ ns1:IntegrationTag> <ns1:Required>false</ns1:Required> <ns1:ReadOnly>true</ns1:ReadOnly> <ns1:DefaultVal /> <ns1:ListOfFieldTranslations> <ns1:FieldTranslation> <ns1:LanguageCode>ENU</ns1:LanguageCode> <ns1:DisplayName>My Custom Link</ ns1:DisplayName> </ns1:FieldTranslation> </ns1:ListOfFieldTranslations> </ns1:Field> </pre>	<p>This example displays a section of a Field Management XML containing a field of type Web Link.</p> <p>The Field Management service includes Custom Web Links. When you run a Read or ReadAll command, the resulting XML file will include any customized fields of type Web Link. The Upsert also supports XML files that contain Web Link information.</p> <p>For more information about custom Web links, see Chapter 8, "Migrating Custom Web Link Fields."</p>

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

Migrating Custom Fields

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate field definitions:

- [Extracting Customized Field Definitions for a Single Object's Section](#)
- [Extracting All Customized Field Definitions](#)
- [Updating or Inserting a Set of Field Definitions \(Upsert\)](#)

■ Creating a New Field Definition

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting Customized Field Definitions for a Single Object's Section

This topic describes how to extract the set of customized field definitions for a single object's section from your Oracle CRM On Demand server for your environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single object's section:

```
migrationtool -u <userID> -s <server URL> Read FieldManagement <system object name>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<system object name>* is the system name of the object whose field definitions you want to extract, for example, Account Contact. A complete set of system names is listed in [System Names for Record Types on page 201](#).

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting Customized Field Definitions for a Single Object's Section

The following is an example of extracting the custom field definitions for the Account Contact object:

```
migrationtool -u <userID> -s <server URL> Read FieldManagement "Account Contact"
```

NOTE: Quotation marks are required only if the name contains spaces.

Extracting All Customized Field Definitions

This topic describes how to extract all customized field definitions from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all customized field definitions:

```
migrationtool -u <userID> -s <server URL> ReadAll FieldManagement
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Customized Field Definitions

The following is an example of extracting all customized field definitions from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll FieldManagement
```

Updating or Inserting a Set of Field Definitions (Upsert)

This topic describes how to update a specific set of field definitions (if they exist) or insert those field definitions (if they do not exist) on your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific set of field definitions (if they exist), or insert those field definitions (if they do not exist):

```
migrationtool -u <userID> -s <server URL> Upsert FieldManagement  
    <Field Management XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Field Management XML>* is the fully qualified path name of the field management XML file, for example:

```
C:\My Files\AccountContact.xml
```

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Set of Field Definitions

The following is an example of updating account contact field definitions (if they exist) or inserting the field definitions (if they do not exist) in your Oracle CRM On Demand server

```
migrationtool -u <user/ID> -s <server URL> Upsert FieldManagement "C:\My
Files\AccountContact.xml "
```

NOTE: Quotation marks are required only if the file name contains spaces.

Creating a New Field Definition

This topic describes how to create a new field definition for your Oracle CRM On Demand environment. (Typically, the Create operation is used to manually create brand new XML content rather than extracting the definition from a company.)

NOTE: System names (that is, the value between the `<ns2:Name>` tag) cannot be defined by a user, and it is a required field. A system name is a required field for an Upsert command. Any Field Management XML file extracted from a company tenant always has the system name defined. A net new field is a field that has not been extracted from another tenant but is defined in an XML file. To create a net new field, you must use the Create function. The Create function allows you to insert field definitions without having the system name defined.

The following is an example XML for using the Create method when you want to explicitly create a new field on the target:

```
<ns2:CustomField xmlns:ns2="urn:/crmondemand/xml/fieldmanagement/data">
  <ns2:ObjectName>Account</ns2:ObjectName>
  <ns2:DisplayName>My Customized Field</ns2:DisplayName>
  <ns2:CustomFieldType>Text (Long)</ns2:CustomFieldType>
  <ns2:IntegrationTag>My_Customized_Field</ns2:IntegrationTag>
  <ns2:Required>false</ns2:Required>
  <ns2:ReadOnly>false</ns2:ReadOnly>
  <ns2:DefaultValue/>
  <ns2:ListOfCustomFieldTranslations>
    <ns2:CustomFieldTranslation>
      <ns2:LanguageCode>ENU</ns2:LanguageCode>
      <ns2:DisplayName>My Customized Field</ns2:DisplayName>
    </ns2:CustomFieldTranslation>
  </ns2:ListOfCustomFieldTranslations>
</ns2:CustomField>
```

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to create a new field definition:

```
migrationtool -u <user/ID> -s <server URL> Create FieldManagement
<Field Management XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Field Management XML>* is the fully qualified path name of the field management XML file, for example:

C:\My Files\MyAccountField.xml

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Creating a New Field Definition

The following is an example of creating a field definition for the Account object:

```
migrationtool -u <userID> -s <server URL> Create FieldManagement "C:\My  
Files\MyAccountField.xml"
```

NOTE: Quotation marks are required only if the name contains spaces.

11 Migrating Homepage Layouts

This chapter describes how to migrate homepage layouts using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Homepage Layouts on page 85](#)
- [Privileges Required on page 85](#)
- [Elements and Sections in the Homepage Layout XML Output File on page 86](#)
- [Migrating Homepage Layouts on page 89](#)

Homepage Layouts

A *homepage layout* for a record provides the most relevant information to different users for that record. Most homepage layouts display the tasks related to the types of records that correspond to that page, for example, account-related tasks for the Accounts homepage. Generally, they also display filtered lists that have been defined by your administrator, and an analytic chart relevant to your work. Homepage layouts can also contain Web widgets, RSS feeds, and other Web content, depending on what your company administrator has set up. From the homepage for a record, you can drill down on other pages to manage the various types of information as required.

[Table 31](#) describes the Oracle Migration Tool On Demand client commands used with homepage layouts. For more information on running these commands, see [Exporting All Homepage Layouts on page 89](#).

Table 31. Commands Used with Homepage Layouts in Oracle Migration Tool On Demand

Command	Description
ReadAll HomepageLayout	This command exports all homepage layouts for all objects.
Upsert HomepageLayout <HomepageLayout XML>	This command updates or inserts a homepage layout, as required.

Privileges Required

The following privileges are required for the user account running the ReadAll and Upsert commands:

- Enable Web Services Access
- Customize Application
- Customize Application - Manage Homepage Customizations

- Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Homepage Layout XML Output File

Table 32 describes the elements and sections of the homepage layout XML output file.

Table 32. Elements and Sections in Homepage Layout XML File

Element or Section Name	Description
<code><ns1:ObjectName>Account</ns1:ObjectName></code>	This element contains the system name of the object to which the homepage layout refers.
<code><ns1:LayoutName>Account Default Layout</ns1:LayoutName></code>	This element contains the name of the homepage layout.
<code><ns1:Description>R18 Default Layout for Account Homepage</ns1:Description></code>	This element contains a description of the homepage layout.
<code><ns1:ListOfAvailableSection> <ns1:AvailableSection> <ns1:SectionName>AccountRecentlyApplied</ns1:SectionName> <ns1:SectionLayoutName>MyRecentlyModifiedAccounts</ns1:SectionLayoutName> </ns1:AvailableSection> </ns1:ListOfAvailableSection></code>	This section contains all the sections that are displayed in the Available column of the Oracle CRM On Demand UI for the homepage layout. For information on how a section layout name (<SectionLayoutName>) is mapped to its corresponding UI value, see Homepage Layout Mapping on page 209 .

Table 32. Elements and Sections in Homepage Layout XML File

Element or Section Name	Description
<pre> <ns1:ListOfSelectedSection> <ns1:SelectedSection> <ns1:SectionName>PdqList</ns1:SectionName> <ns1:SectionLayoutName>HomepageAccountList</ns1:SectionLayoutName> <ns1:Sequence>0</ns1:Sequence> </ns1:SelectedSection> </ns1:ListOfSelectedSection> </pre>	<p>This section contains all the sections that are displayed in the left-side column and right-side column of the Oracle CRM On Demand UI for the homepage:</p> <ul style="list-style-type: none"> ■ The <SectionName> element contains an internal applet name that is associated with the SectionLayoutName. Do not modify this element. ■ The <SectionLayoutName> element contains the section. For reference information on how a section layout name is mapped to its corresponding UI name, see Homepage Layout Mapping on page 209. ■ The Sequence element determines the column in which the section is displayed: <ul style="list-style-type: none"> ■ All even numbers, including 0 (zero), display the specified section in the left-side column, where 0 (zero) is the first section of the left-side column. ■ All odd numbers display the section in the right-side column, where a value of 1 is the top (or first) section.

For more information on the mapping of the section layout name to the corresponding UI section name for homepage layouts, see [Homepage Layout Mapping on page 209](#).

About the PdqList Section Name

In the <ListOfSelectedSection> section in [Elements and Sections in Homepage Layout XML File on page 86](#), the section name, PdqList, is an applet name. The applet name specified in the corresponding object homepage XML file (for example, in AccountHomepage.xml or ContactHomepage.xml) is the same, but the layout name is different.

For example, for the Account homepage object, the applet name, layout name, and display name might be as follows:

- Applet Name: PdqList
- Layout Name: HomepageAccountList
- Display Name: Account Lists

For example, for the Contact homepage object, the applet name, layout name, and display name might be as follows:

- Applet Name: PdqList
- Layout Name: HomepageContactList
- Display Name: Contact Lists

Example of Sequence Values in the Section: ListOfSelectedSection

Figure 1 represents the left and right side of the Accounts homepage UI. Exporting this homepage generates the <ListOfSelectedSection> section in the XML code displayed in [Example of Generated XML Code for the Sequence Values](#). The sequence numbers for the left-side column and right-side column displayed in [Example of Generated XML Code for the Sequence Values](#) are highlighted in bold in the XML code.

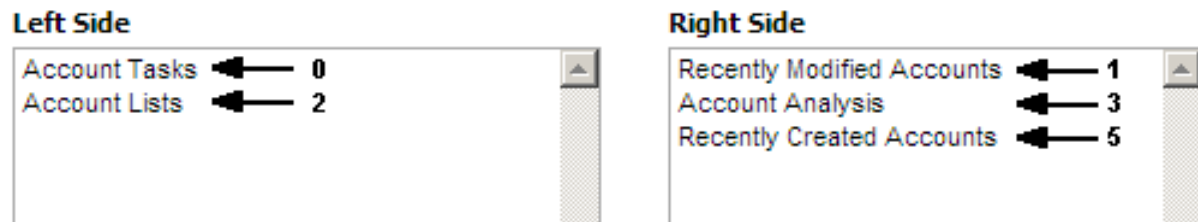


Figure 1. Example XML Code for the Sequence Values in the <ListOfSelectedSection> Section

Example of Generated XML Code for the Sequence Values

The following example displays the generated XML code for sequence values:

```
<ns1:ListOfSelectedSection>
  <ns1:SelectedSection>
    <ns1:SectionName>AccountRelatedTasks</ns1:SectionName>
    <ns1:SectionLayoutName>AllOpenAccountTasks</ns1:SectionLayoutName>
    <ns1:Sequence>0</ns1:Sequence>
  </ns1:SelectedSection>
  <ns1:SelectedSection>
    <ns1:SectionName>AccountRecentlyApplet</ns1:SectionName>
    <ns1:SectionLayoutName>AllRecentlyModifiedAccounts</ns1:SectionLayoutName>
    <ns1:Sequence>1</ns1:Sequence>
  </ns1:SelectedSection>
</ns1:ListOfSelectedSection>
```



```

    <ns1: SectionName>Pdqlist</ns1: SectionName>
    <ns1: SectionLayoutName>HomepageAccountList</ns1: SectionLayoutName>
    <ns1: Sequence>2</ns1: Sequence>
  </ns1: SelectedSection>
  <ns1: SelectedSection>
    <ns1: SectionName>HomePageListAnalyticsRevenue</ns1: SectionName>
    <ns1: SectionLayoutName>Account Analysis Report</ns1: SectionLayoutName>
    <ns1: Sequence>3</ns1: Sequence>
  </ns1: SelectedSection>
  <ns1: SelectedSection>
    <ns1: SectionName>AccountRecentlyApplied</ns1: SectionName>
    <ns1: SectionLayoutName>All Recently Created Accounts</ns1: SectionLayoutName>
    <ns1: Sequence>5</ns1: Sequence>
  </ns1: SelectedSection>
</ns1: ListOfSelectedSection>

```

Migrating Homepage Layouts

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with homepage layouts:

- [Exporting All Homepage Layouts on page 89](#)
- [Updating or Inserting a Homepage Layout \(Upsert\) on page 90](#)

Exporting All Homepage Layouts

The following topic describes how to export all homepage layouts from your Oracle CRM On Demand environment (customer test environment or production).

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to export all homepage layouts:

```
migrationtool -u <userID> -s <server URL> ReadAll HomepageLayout
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Exporting All Homepage Layouts

The following is an example of exporting all homepage Layouts from your Oracle CRM On Demand server:

```
migrationtool -u <user/ID> -s <server URL> ReadAll HomepageLayout
```

Updating or Inserting a Homepage Layout (Upsert)

This topic describes how to update a specific homepage layout (if it exists), or insert that homepage layout (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production). For the purposes of the Oracle Migration Tool On Demand client, this is known as an *upsert operation*. It is specified using the Upsert command.

An update to a homepage layout is derived from the homepage layout system name. That is, if you run an upsert operation on a homepage layout where the homepage layout system name in the XML file is *My Homepage*, and a homepage layout of the same name exists in the target company, the target homepage layout is updated. If the homepage layout does not exist on the target company, then the homepage layout is inserted on the target. The matching of the homepage layout name is also case sensitive. For example, if the homepage layout system name in the XML file is *MY Homepage* and the target access profile is *My Homepage* (no capital Y), the *MY Homepage* is inserted in the target.

The Enable Web Services Access and Customize Application privileges are required for an upsert operation on a homepage layout.

NOTE: Users cannot reference record names or section names that are not set up on the target system in an upsert operation.

Sequence Tags

The <Sequence> tag in the homepage layout XML must contain all the sequence values for the layout.

For example, the following are acceptable sequence values for the upsert operation:

```
0, 1, 2
0, 1, 3
0, 2, 4
0

1
1, 3
0, 1, 3
```

The following sequence values are not acceptable for an upsert operation:

- -1 is not acceptable because only positive integers are acceptable
- 0, 0, 1, 2 is not acceptable because duplicates must not exist
- 2 is not acceptable because the first left side value (that is, 0) is missing
- 3 is not acceptable, because the first right side value (that is, 1) is missing

- 1, 2 is not acceptable because the first left side value (that is, 0) is missing
- 0, 3 is not acceptable because the first right side value (that is, 1) is missing
- 0,1,2,5 is not acceptable, because the second right side value (that is, 3) is missing
- 0, 2, 3 is not acceptable, because the first right side value (that is, 1) is missing

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific homepage layout (if it exists) or insert the homepage layout (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert HomepageLayout <Homepagelayout XML>
```

where:

- <userID> is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- <server URL> is the URL for the Oracle CRM On Demand server where your company resides.
- <Homepagelayout XML> is the fully qualified path name of the Homepage Layout XML file, for example:

```
C:\My Files\My HomepageLayout.xml
```

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Homepage Layout

The following is an example of updating a specific homepage layout (if it exists) or inserting that homepage layout (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert HomepageLayout  
"C:\My Files\My HomepageLayout.xml"
```

NOTE: Quotation marks are required only if the name consists of spaces.

12 Migrating Page Layouts

This chapter describes how to migrate page layouts using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Page Layouts on page 93](#)
- [Privileges Required on page 94](#)
- [Elements and Sections in the Page Layout Field Information XML Output File on page 94](#)
- [Elements and Sections in the Page Layout Related Information XML File on page 96](#)
- [Elements and Sections in the Page Layout Section XML Output File on page 98](#)
- [Migrating Page Layout Field Information on page 100](#)
- [Migrating Page Layout Related Information on page 101](#)
- [Migrating Page Layout Section Information on page 103](#)

Page Layouts

A *page layout* defines the appearance of pages, such as the Edit, Detail, or Create pages for Oracle CRM On Demand records by hiding or adding sections or fields to the page. Page layouts can be one of the following:

- **Static.** Indicates that specific fields are defined by role
- **Dynamic.** Indicates that the layout changes are based on the type of record being created, but the layout can also be assigned by role

[Table 33](#) describes the Oracle Migration Tool On Demand client commands used with page layouts. For more information on running these commands, see [Migrating Page Layout Field Information on page 100](#).

Table 33. Commands Used with Page Layouts in Oracle Migration Tool On Demand

Command	Description
ReadAll PageLayoutField	This command exports all field setup and layout information for an object's page layout defined in Step 2 and Step 3 of the Oracle CRM On Demand Page Layout Wizard.
ReadAll PageLayoutRelatedInformation	This command exports all related information for an object's Page Layout defined in Step 4 and Step 5 of the Page Layout Wizard.

Table 33. Commands Used with Page Layouts in Oracle Migration Tool On Demand

Command	Description
ReadAll PageLayoutSection	This command exports all section setup and layout information for an object's page layout defined in the Oracle CRM On Demand Page Layout Wizard.
Upsert PageLayoutField <path of XML file/xml file name>	This command updates or inserts the field setup and layout information for a page layout. The page layout is derived from an XML file definition.
Upsert PageLayoutRelatedInformation <path of XML file/xml file name>	This command updates or inserts page layout related information. The page layout is derived from an XML file definition.
Upsert PageLayoutSection <path of XML file/xml file name>	This command updates or inserts page layout section information. The page layout is derived from an XML file definition.

NOTE: Nonadministrative Oracle CRM On Demand users can run the ReadAll command for PageLayoutField, PageLayoutRelatedInformation, and PageLayoutSection.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the ReadAll command: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access and Customize Application.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Page Layout Field Information XML Output File

Table 34 describes the elements and sections of the Page Layout Field Information XML output file.

Table 34. Elements and Sections in the Page Layout Field Information XML File

Element or Section Name	Description
<ns1:ObjectName>Account</ns1:ObjectName>	This element contains the system name of the object to which the page Layout refers.
<ns1:LayoutName>My Custom Account Page Layout</ns1:LayoutName>	This element contains the name of the page layout.

Table 34. Elements and Sections in the Page Layout Field Information XML File

Element or Section Name	Description
<code><ns1:Description>My Custom Account Page Layout Description</ns1:Description></code>	This element contains the description of the page layout.
<code><ns1:ListOfPageLayoutField></code> <code><ns1:PageLayoutField></code> <code><ns1:FieldName>Name</ns1:FieldName></code> <code><ns1:ReadOnly>false</ns1:ReadOnly></code> <code><ns1:Required>true</ns1:Required></code> <code><ns1:Section>0</ns1:Section></code> <code><ns1:Column>0</ns1:Column></code> <code><ns1:Row>0</ns1:Row></code> <code></ns1:PageLayoutField></code> <code></ns1:ListOfPageLayoutField></code>	This section contains the field layout information. For more information, see Example of the Values for Page Layout Field Information on page 95 .

Example of the Values for Page Layout Field Information

Figure 2 is a screen capture displaying the section, column, and row values that the XML output generates for the page layout field information.

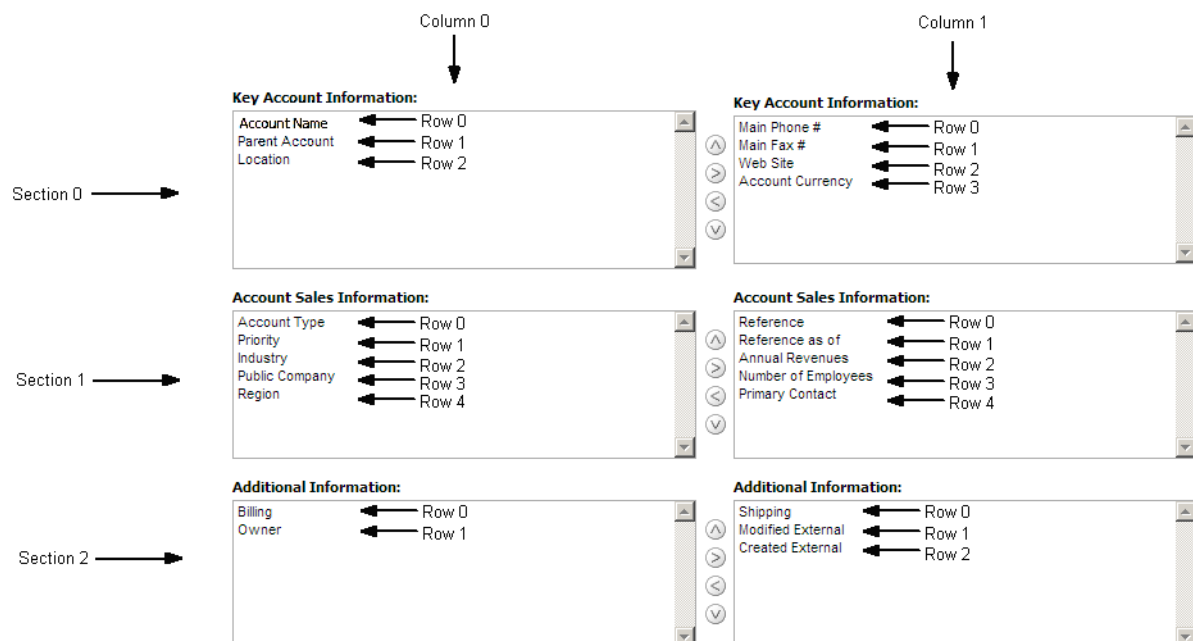


Figure 2. Example of the Values for the Page Layout Field Information

The UI Name might not match the value contained in the <ns1: Fi el dName> element. Use the section, column, and row values provided in the XML file to appropriately determine the value that it represents in the UI. For example, consider the following portion of the XML output, which is based on the configuration in [Figure 2](#):

```
<ns1: PageLayoutFi el d>
  <ns1: Fi el dName>Type</ns1: Fi el dName>
  <ns1: ReadOnl y>fal se</ns1: ReadOnl y>
  <ns1: Requi red>fal se</ns1: Requi red>
  <ns1: Secti on>1</ns1: Secti on>
  <ns1: Col umn>0</ns1: Col umn>
  <ns1: Row>0</ns1: Row>
</ns1: PageLayoutFi el d>
```

Using [Figure 2](#) and the values for the <ns1: Secti on>, <ns1: Col umn>, and <ns1: Row> elements in the XML code, you can observe that <ns1: Fi el dName>Type</ns1: Fi el dName> corresponds to the UI value of Account Type in the Account Sales Information section.

Elements and Sections in the Page Layout Related Information XML File

[Table 35](#) describes the elements and sections of the Page Layout Related Information XML file and the values.

Table 35. Elements and Sections in the Page Layout Related Information XML File

Element or Section Name	Description
<ns1: Obj ectName>Account</ns1: Obj ectName>	This element contains the system name of the object to which the page layout refers.
<ns1: LayoutName>My Custom Account Page Layout</ns1: LayoutName>	This element contains the name of the page layout.

Table 35. Elements and Sections in the Page Layout Related Information XML File

Element or Section Name	Description
<pre> <ns1:ListOfPageRelatedInformation> <ns1:PageRelatedInformation> <ns1:Name>CRMODLS_BPL_ACNT.ChildList</ns1:Name> <ns1:Availability>-1</ns1:Availability> <ns1:RelatedInformationLayout> </ns1:RelatedInformationLayout> </ns1:PageRelatedInformation> </ns1:ListOfPageRelatedInformation> </pre>	<p>This section contains the information for the Related Information section:</p> <ul style="list-style-type: none"> ■ The Availability value of -1 corresponds to the Not Available Information section of the UI. ■ The Availability value of 0 corresponds to the Available Information section of the UI. ■ The Availability value of 1 corresponds to the Displayed Information section of the UI. <p>Table 65 on page 230 maps the values of the <Name> tag in the XML file to the name in the UI.</p>

Example of the Values for Page Layout Related Information

[Figure 3](#) is a screen capture displaying the availability information that the XML output generates for page layout related information. It lists three levels of availability:

- Not Available Information
- Available Information
- Displayed Information

The Availability values displayed in the example are explained in the description of the ListOfPageRelatedInformation section in [Table 35](#).

Not Available Information	Available Information	Displayed Information
<div> <div>Custom Objects 08</div> <div>← -1</div> </div> <div> <div>Custom Objects 07</div> <div>← -1</div> </div> <div> <div>Partner Teams</div> <div>← -1</div> </div> <div> <div>Plan Account</div> <div>← -1</div> </div> <div> <div>Objective</div> <div>← -1</div> </div> <div> <div>Custom Objects 09</div> <div>← -1</div> </div> <div> <div>Custom Objects 04</div> <div>← -1</div> </div>	<div> <div>Addresses</div> <div>← 0</div> </div> <div> <div>Custom Objects 01</div> <div>← 0</div> </div> <div> <div>Custom Objects 02</div> <div>← 0</div> </div> <div> <div>Custom Objects 03</div> <div>← 0</div> </div> <div> <div>Custom Objects 10</div> <div>← 0</div> </div> <div> <div>Sub-Accounts</div> <div>← 0</div> </div>	<div> <div>Contacts</div> <div>← 1</div> </div> <div> <div>Leads</div> <div>← 2</div> </div> <div> <div>Opportunities</div> <div>← 3</div> </div> <div> <div>Assets</div> <div>← 4</div> </div> <div> <div>Service Requests</div> <div>← 5</div> </div> <div> <div>Notes</div> <div>← 6</div> </div> <div> <div>Open Activities</div> <div>← 7</div> </div> <div> <div>Completed Activities</div> <div>← 8</div> </div>


Figure 3. Example of the Values for Page Layout Related Information

About the Displayed Information Section

The order of the sections in the XML file for the Displayed Information section (that is, if Availability is set to 1) determines the order that is displayed in the UI. This order applies to both the ReadAll and Upsert commands. [Figure 4](#) displays how the order is implemented. In [Figure 4](#), in Example 1, the sections have the following order: Contacts, Leads, and then Opportunities. In Example 2, the sections have the following order: Opportunities, Contacts, and then Leads.

Example 1

```
<ns1:PageRelatedInformation>
  <ns1:Name>ContactPersonChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>LeadChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>OptyChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
```




Displayed Information

- Contacts
- Leads
- Opportunities

Example 2

```
<ns1:PageRelatedInformation>
  <ns1:Name>OptyChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>ContactPersonChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>LeadChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
```



Displayed Information

- Opportunities
- Contacts
- Leads

Figure 4. About the Displayed Information Section

Elements and Sections in the Page Layout Section XML Output File

[Table 36](#) describes the elements and sections of the Page Layout Section XML file.

Table 36. Elements and Sections in the Page Layout Section XML File

Element or Section Name	Description
<ns1:ObjectName>Account</ns1:ObjectName>	This element contains the system name of the object to which the page Layout refers.

Table 36. Elements and Sections in the Page Layout Section XML File

Element or Section Name	Description
<code><ns1:LayoutName>myPageAccountLayout</ns1:LayoutName></code>	This element contains the name of the page layout.
<code><ns1:ListOfPageFormSection></code> <code><ns1:PageFormSection></code> <code><ns1:SectionSequence>3</ns1:SectionSequence></code> <code><ns1:ListOfFormSectionTranslation></code> <code><ns1:FormSectionTranslation></code> <code><ns1:LangId>ENU</ns1:LangId></code> <code><ns1:DisplayName>Account Partner Information:</ns1:DisplayName></code> <code></ns1:FormSectionTranslation></code> <code></ns1:ListOfFormSectionTranslation></code> <code></ns1:PageFormSection></code> <code></ns1:ListOfPageFormSection></code>	This section contains the Page Layout Section information. For more information, see Example of the Values for Page Layout Section .

Example of the Values for Page Layout Section

In a page layout section XML file, the `<ns1:SectionSequence>` element represents the location of the section relative to other sections in the page layout in the UI. The first section at the top of the page layout has a `<ns1:SectionSequence>` of 0 which increments by 1 as the sequence moves down the sections in the page layout.

For example, consider the following portion of the XML output, which is based on the configuration of the example page layout section in [Figure 5](#):

```
<ns1:SectionSequence>2</ns1:SectionSequence>
<ns1:ListOfFormSectionTranslation>
<ns1:FormSectionTranslation>
<ns1:LangId>ENU</ns1:LangId>
<ns1:DisplayName>Additional Information:</ns1:DisplayName>
</ns1:FormSectionTranslation>
</ns1:ListOfFormSectionTranslation>
```

Section Names Setup
[Back to Account Page Layout](#)
[Help](#)
[Printer Friendly](#)

Edit Section Names
Save
Cancel
Translation Language: English-American

Click the Mark for Translation checkbox in order to track Display Names that need to be translated into other languages. Use this option when changing section headers and the changes require translation into another language. Click the help link to learn more.

Display Name	Default Name	Mark for Translation
Key Account Information:	Key Account Information: ← Section 0	<input type="checkbox"/>
Account Sales Information:	Account Sales Information: ← Section 1	<input type="checkbox"/>
Additional Information:	Additional Information: ← Section 2	<input type="checkbox"/>
Available Section:	Available Section: ← Section 3	<input type="checkbox"/>
Available Section:	Available Section: ← Section 4	<input type="checkbox"/>
Available Section:	Available Section: ← Section 5	<input type="checkbox"/>

Figure 5. Example Page Layout Section

Because the `<ns1: SectionSequence>` element in the XML output is set to 2 for the *Additional Information:* section, [Figure 5 on page 99](#) shows that *Additional Information:* is the third section in the user interface.

Migrating Page Layout Field Information

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate page layout field information:

- [Extracting All Page Layout Field Information for an Object on page 100](#)
- [Updating or Inserting Page Layout Field Information for a Specific Object \(Upsert\) on page 101](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting All Page Layout Field Information for an Object

This topic describes how to extract all page layout field information for a specific object from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all page layout field information for a specific object:

```
migrationtool -u <userID> -s <server URL> ReadAll PageLayoutField
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Page Layout Fields

The following is an example of extracting all page layout field information for a specific object from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll PageLayoutField
```

Updating or Inserting Page Layout Field Information for a Specific Object (Upsert)

This topic describes how to update page layout field information for a specific object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update page layout field information for a specific object (if it exists) or insert this information (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert PageLayoutField
<Page Layout Field XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Page Layout Field XML>* is the fully qualified path name of the page layout field information XML file for a specific object such as Account, for example:

```
C:\My Files\PageLayoutFieldInformation\Account.xml
```

Example of Updating or Inserting Page Layout Information for a Specific Object

The following is an example of updating page layout field information for a specific object such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert PageLayoutField
"C:\My Files\PageLayoutFieldInformation\Account.xml"
```

NOTE: Quotation marks are required only if the name contains spaces.

Migrating Page Layout Related Information

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate page layout field information:

- [Extracting All Page Layout Related Information for an Object on page 102](#)
- [Updating or Inserting Page Layout Related Information for a Specific Object \(Upsert\) on page 102](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting All Page Layout Related Information for an Object

This topic describes how to extract all page layout related information for a specific object from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all page layout related information for a specific object:

```
migrationtool -u <userID> -s <server URL> ReadAll PageLayoutRelatedInformation
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Page Layout Related Information

The following is an example of extracting all page layout field information for a specific object from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll PageLayoutRelatedInformation
```

Updating or Inserting Page Layout Related Information for a Specific Object (Upsert)

This topic describes how to update page layout related information for a specific object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update page layout related information for a specific object (if it exists) or insert this information (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert PageLayoutRelatedInformation  
  <Page Layout Related XML>
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.
- `<Page Layout Related XML>` is the fully qualified path name of the page layout related information XML file for a specific object, such as Account, for example:

C:\My Files\PageLayoutRelatedInformation\Account.xml

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting Page Layout Information for a Specific Object

The following is an example of updating the page layout related information for a specific object, such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert PageLayoutRelatedInformation
"C:\My Files\PageLayoutRelatedInformation\Account.xml"
```

NOTE: Quotation marks are required only if the name contains spaces.

Migrating Page Layout Section Information

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate page layout section information:

- [Extracting All Page Layout Section Information for an Object](#)
- [Updating or Inserting Page Layout Section Information for a Specific Object \(Upsert\)](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting All Page Layout Section Information for an Object

This topic describes how to extract all page layout section information for a specific object from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all page layout section information for a specific object:

```
migrationtool -u <userID> -s <server URL> ReadAll PageLayoutSection
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Page Layout Section Information

The following is an example of extracting all page layout section information for a specific object from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll PageLayoutSection
```

Updating or Inserting Page Layout Section Information for a Specific Object (Upsert)

This topic describes how to update page layout section information for a specific object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update page layout section information for a specific object (if it exists) or insert this information (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert PageLayoutSection  
  <Page Layout Section XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Page Layout Section XML>* is the fully qualified path name of the page layout section information XML file for a specific object, such as Account, for example:

```
C:\My Files\PageLayoutSection\Account\AccountPageLayoutSection.xml
```

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting Page Layout Section Information for a Specific Object

The following is an example of updating the page layout section information for a specific object, such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <user/ID> -s <server URL> Upsert PageLayoutSection
"C:\My Files\PageLayoutSection\Account\AccountPageLayoutSection.xml "
```

NOTE: Quotation marks are required only if the name contains spaces.

13 Migrating Picklist Values

This chapter describes how to migrate picklist values using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Picklist Values on page 107](#)
- [Privileges Required on page 107](#)
- [Elements and Sections in the Picklist XML Output File on page 108](#)
- [Migrating Picklist Values on page 110](#)

Picklist Values

Picklist values are those values that you have assigned to a field of the type Picklist in Oracle CRM On Demand. [Table 37](#) describes the Oracle Migration Tool On Demand client commands used with picklist values. For more information on running these commands, see [Migrating Picklist Values on page 110](#).

Table 37. Oracle Migration Tool On Demand Commands for Picklist Values

Command	Description
Read Picklist <i><Object's System Name></i>	This command exports a set of picklist values derived from the system name of an object. The values for <i><Object's System Name></i> are listed in System Names for Record Types on page 201 .
ReadAll Picklist	This command exports all fields separated by the object name.
Upsert Picklist <i><path of XML file/xml file name></i>	This command updates or inserts a set of fields in a particular object.

NOTE: Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.

- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

Field management must be supported by the object.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Picklist XML Output File

Table 38 describes the elements of the Picklist XML output file.

Table 38. Description of Picklist XML File Elements

Element	Description
<code><ns1: IncludeAll>true</code> <code></ns1: IncludeAll></code>	This element specifies whether all configuration information is returned for an object, in addition to the customized configuration information. If it is set to true, then all configuration information is returned. The default setting is false.
<code><ns1:ObjectName></code>	This element contains the object that is being referenced.
<code><ns1:ListOfPicklists></code>	This element contains all the customized field definitions for the object name.
<code><ns1:Name>Team Role</ns2:Name></code>	The name of the Picklist field within the object being referenced.

Table 39 describes the sections of the Picklist XML file.

Table 39. Description of Picklist XML File Sections

Section Name	Description
<pre> <ns1:ListOfPicklistValues> <ns1:PicklistValue> <ns1:ValueId>Executive Sponsor</ns1:ValueId> <ns1:Disabled>false</ns1:Disabled> <ns1:ListOfValueTranslations> <ns1:ValueTranslation> <ns1:LanguageCode>ENU</ns1:LanguageCode> <ns1:Value>Executive Sponsor</ns1:Value> <ns1:Order>2</ns1:Order> </ns1:ValueTranslation> </ns1:ListOfValueTranslations> </ns1:PicklistValue> </pre>	<p>This section contains the values assigned to a picklist field:</p> <ul style="list-style-type: none"> ■ <ns1:ValueId> is the ValueId assigned to the specific picklist value. ■ <ns1:Disabled> identifies whether the value is disabled or not. ■ <ns1:ValueTranslation> is the section containing the language code, the value for the given language, and the order for the specific ValueID.
<pre> <ns1:ListOfFieldTranslations> <ns1:FieldTranslation> <ns1:LanguageCode>ENU</ns1:LanguageCode> <ns1:DisplayName>Roles</ns1:DisplayName> <ns1:ValidationErrorMessage></ns1:ValidationErrorMessage> </ns1:FieldTranslation> </ns1:ListOfFieldTranslations> </pre>	<p>This section indicates the Display Name and Validation Error Message that is displayed for the language code. In this example, for English-American (ENU), the display name is <i>Roles</i>, and the Validation Error Message is not set. For the list of language codes, see Language Codes and Their Corresponding Language and Country on page 163.</p> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> 1 The translation definition, if it is defined. 2 The information contained in the <display name> tag if it is defined and if the translation definition is not defined. 3 The system name if the translation definition and if the <display name> are not defined.

Migrating Picklist Values

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate picklist values:

- [Extracting All Picklist Values for an Object](#)
- [Extracting a Single Picklist Field](#)
- [Extracting All Picklist Values](#)
- [Updating or Inserting a Set of Picklist Values for a Specific Object \(Upsert\)](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting All Picklist Values for an Object

This topic describes how to extract all picklist values from your Oracle CRM On Demand server for your environment (customer test environment or production) for a specified object.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all picklist values for a specified object:

```
mi grati ontool -u <userID> -s <server URL> Read Pickl i st <system name of object>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<system name of object>* is the system name of the object for which you want to extract the picklists, for example, Account. A complete set of system names is listed in [System Names for Record Types on page 201](#).

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example

The following is an example of extracting the picklist values for the Account object:

```
mi grati ontool -u <userID> -s <server URL> Read Pickl i st Account
```

NOTE: Quotation marks are required only if the object name contains spaces.

Extracting a Single Picklist Field

To extract a single picklist field for an object, complete the steps in the following procedure.

To extract a single picklist field

- 1 Prepare an input XML file as follows:

```
<ns2:PicklistSet xmlns:ns2="urn:/crmondemand/xml/picklist/query">
  <ns2:ObjectName>ObjectName</ns2:ObjectName>
  <ns2:ListOfPicklists>
    <ns2:Picklist>
      <ns2:Name>PickListName</ns2:Name>
    </ns2:Picklist>
  </ns2:ListOfPicklists>
</ns2:PicklistSet>
```

where:

- *ObjectName* is the name of the object, for example, Account.
- *PickListName* is the name of the picklist that you want to extract.

- 2 Run the Oracle Migration Tool On Demand client as follows:

```
migratontool -u <userID> -s <server URL> Read Picklist <Input XML file path>
```

For example, if your input XML file is named, MyAccountPicklist.xml:

```
migratontool -u <userID> -s <server URL> Read Picklist
"C:\My Files\MyAccountPicklist.xml "
```

Extracting All Picklist Values

This topic describes how to extract all picklist values from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all picklist values for all objects:

```
migratontool -u <userID> -s <server URL> ReadAll Picklist
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

Example of Extracting All Picklist Values

The following is an example of extracting all picklist values from your Oracle CRM On Demand server for all objects:

```
migrationtool -u <userID> -s <server URL> ReadAll Picklist
```

Updating or Inserting a Set of Picklist Values for a Specific Object (Upsert)

This topic describes how to update a set of picklist values (if the set exists) or insert a set of picklist values (if the set does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a set of picklist values (if the set exists) or insert a set of picklist values (if the set does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert Picklist <Picklist XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<Picklist XML>* is the fully qualified path name of the picklist XML file, for example:

```
C:\My Files\MyAccountPicklist.xml
```

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Set of Picklist Values for a Specific Object

The following is an example of updating a set of custom picklist values for an Account object (if the set exists) or inserting a set of custom picklist values (if the set does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert Picklist  
"C:\My Files\MyAccountPicklist.xml"
```

NOTE: Quotation marks are required only if the path or file name contains spaces.

14 Migrating Related Information Layouts

This chapter describes how to migrate related information layouts using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Related Information Layouts on page 113](#)
- [Privileges Required on page 113](#)
- [Elements and Sections in the Related Information Layout XML Output File on page 114](#)
- [Migrating Related Information Layouts on page 114](#)

Related Information Layouts

A *related information layout* defines how related information sections appear in an Oracle CRM On Demand page layout. Typically, you create related information layouts when customizing Oracle CRM On Demand by using the Page Layout wizard. For more information, see the topics describing the customization of related item layouts and customization of static page layouts in *Oracle CRM On Demand Online Help*.

[Table 40](#) describes the Oracle Migration Tool On Demand client commands used with related information layouts. For more information on running these commands, see [Migrating Related Information Layouts on page 114](#).

Table 40. Commands Used with Related Information Layouts in Oracle Migration Tool On Demand

Command	Description
Read RelatedInformationLayout <i><Object Name></i>	This command exports a set of information layouts from Oracle CRM On Demand.
ReadAll RelatedInformationLayout	This command exports all related information layouts in the Oracle CRM On Demand tenant.
Upsert RelatedInformationLayout <i><Path of XML file/XML file name></i>	This command updates or inserts a related information layout.

NOTE: Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access

- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Related Information Layout XML Output File

Table 41 describes the elements and sections in the Related Information Layout XML output file.

Table 41. Elements and Sections in the Related Information Layout XML File

Element or Section Name	Description
<code><data: RelatedInformationLayout> <data: ObjectName>Account</data: ObjectName> <data: RelatedInformationName>AccountCompetitorChildList</data: RelatedInformationName> <data: Name>AccountRelated</data: Name> <data: Description>Test Account</data: Description></code>	This section contains the elements for related information layouts.
<code><data: ListOfSelectedFields> <data: SelectedField> <data: FieldName>Contact Full Name</data: FieldName> <data: Sequence>0</data: Sequence> </data: SelectedField> <data: SelectedField> <data: FieldName>Contact Phone</data: FieldName> <data: Sequence>1</data: Sequence> </data: SelectedField> </data: ListOfSelectedFields></code>	This section contains the elements for selected fields in related information layouts.

Migrating Related Information Layouts

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate related information layouts:

- [Extracting a Set of Related Information Layouts from an Object on page 115](#)
- [Extracting All Related Information Layouts on page 115](#)
- [Updating or Inserting a Specific Related Information Layout \(Upsert\) on page 117](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting a Set of Related Information Layouts from an Object

This topic describes how to extract a set of related information layouts from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

NOTE: Users require the *Enable Web Services Access* privilege to run the *Read* command.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of related information layouts:

```
migrationtool -u <userID> -s <server URL> Read RelatedInformationLayout  
  <object name>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<object name>* is the object name or record for which you want to read a set of related information layouts, for example, *Account*.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting a Set of Related Information Layouts

The following is an example of extracting a set of related information layouts for the *Account* record:

```
migrationtool -u <userID> -s <server URL> Read RelatedInformationLayout Account
```

Extracting All Related Information Layouts

This topic describes how to extract all related information layouts from your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all related information layouts:

```
migrationtool -u <userID> -s <server URL> ReadAll RelatedInformationLayout
```

where:

■ `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

■ `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

The output from the Oracle Migration Tool On Demand client is located at:

```
<migration tool install>/repository/RelatedInformationLayout/<object>/<related  
information object>/<layout name>.xml
```

For example, when you extract related information list layouts for child account competitor lists, the output is located at the following locations:

```
.../repository/RelatedInformationLayout/Account/AccountCompetitorChildList/  
Standard Related Information Layout.xml
```

```
.../repository/RelatedInformationLayout/Account/AccountCompetitorChildList/My  
Custom Layout.xml
```

Also for example, when you extract related information list layouts for child account partner lists, the output is located at the following locations:

```
.../repository/RelatedInformationLayout/Account/AccountPartnerChildList/Standard  
Related Information Layout.xml
```

```
.../repository/RelatedInformationLayout/Account/AccountPartnerChildList/My Custom  
Layout.xml
```

Optional Tags

The following optional tags in your configuration data determine the content in the output XML file:

■ `<IncludeAll>` tag. Determines whether the ready-to-use layouts are included:

- If the tag value is set to True, then the ready-to-use layouts are included.
- If the tag value is set to False or Null, then the ready-to-use layouts are not included.

■ `<CurrentUserOnly>` tag. Determines if the output must contain only the layouts associated with the user's role:

- If the tag value is set to True, then the layouts associated with the user's role are included.
- If the tag value is set to False or Null, then the layouts associated with the user's role are not included.

Example of Extracting All Related Information Layouts

The following is an example of extracting all related information layouts from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll RelatedInformationLayout
```

Updating or Inserting a Specific Related Information Layout (Upsert)

This topic describes how to update a specific related information layout (if it exists) or to insert the related information layout (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

NOTE: The **Enable Web Services Access** and **Customize Application** privileges are required to run the Upsert operation.

The configuration data is updated when the System Layout Name exists in the target company for the specified object and related object. [Table 42](#) lists the results of an Upsert operation in different situations.

Table 42. Results of an Upsert Operation on a Related Information Layout XML File

If the XML file definition contains...	If the target company contains...	Then the result is...
Object: Account Related Object: Account Competitors Layout Name: My Custom Layout	Object: Account Related Object: Account Competitors Layout: Standard Related Information Layout	A new My Custom Layout is inserted
Object: Account Related Object: Account Competitors Layout Name: My Custom Layout	Object: Account Related Object: Account Competitors Layouts: ■ Standard Related Information Layout ■ My Custom Layout	My Custom Layout is updated.
Object: Account Related Object: Account Competitors Layout Name: Standard Related Information Layout	Object: Account Related Object: Account Competitors Layouts: ■ Standard Related Information Layout ■ My Custom Layout	An error is generated because Standard Related Information Layout cannot be updated.

In [Table 40](#), the Upsert operation has the same limitations as the Oracle CRM On Demand user interface (UI), and it fails if the following conditions occur:

- The XML file contains a layout name length longer than what the UI supports.

- The XML contains a description length longer than what the UI supports.
- The XML content references fields that do not exist on the target system.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific related information layout (if it exists) or inserting the related information layout (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert RelatedInformationLayout  
  <MyRelatedInfoLayout XML>
```

where:

- <userID> is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- <server URL> is the URL for the Oracle CRM On Demand server where your company resides.
- <MyRelatedInfoLayout XML> is the fully qualified path name of the related information layout XML file, for example:

```
C:\My Files\MyRelatedInfoLayout.xml
```

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Related Information Layout

The following is an example of updating a related information layout (if it exists) or inserting the related information layout (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert RelatedInformationLayout  
  "C:\My Files\MyRelatedInfoLayout.xml"
```

NOTE: Quotation marks are required only if the file name or path contains spaces.

15 Migrating Roles

This chapter describes how to migrate roles using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Roles on page 119](#)
- [Privileges Required on page 120](#)
- [Elements and Sections in the Role XML Output File on page 120](#)
- [Migrating Roles on page 123](#)

Roles

A *role* in Oracle CRM On Demand is similar to a business function that a user performs within an organization, such as a sales executive function or a service manager function. Within your organization, your business function gives you certain privileges and permissions that are unique to your business function. Similarly, within the context of Oracle CRM On Demand, roles differentiate one business function from another by doing the following:

- Defining the features in Oracle CRM On Demand that a user has the privileges to use
- Defining the set of permissions the user is given to work with protected information
- Defining the user interface settings that display this information

[Table 43](#) describes the Oracle Migration Tool On Demand client commands used with roles. For more information on running these commands, see [Migrating Roles on page 123](#).

Table 43. Commands Used with Roles in Oracle Migration Tool On Demand

Command	Description
ReadAll Role	This command exports all roles in the Oracle CRM On Demand tenant.
Upsert Role <i><path of XML file/xml file name></i>	<p>This command updates or inserts a role.</p> <p>NOTE: For an update to occur, the criteria must match the value of the <code><ns1:RoleName></code> element, which is case-sensitive. For example, Administrator and ADMINISTRATOR are two different values.</p>

NOTE: Nonadministrative Oracle CRM On Demand users can run the ReadAll command.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the ReadAll command: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access and Customize Application.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Role XML Output File

Table 44 describes the elements and sections in the Roles XML output file.

Table 44. Elements and Sections in Roles XML File

Element or Section Name	Description
<code><ns1:RoleName>Administrator</ns1:RoleName></code>	This element contains the system name of the role.
<code><ns1:Description>OnDemand Role</ns1:Description></code>	This element contains the description for the role.
<code><ns1:DefaultSalesProcess>Default Sales Process</ns1:DefaultSalesProcess></code>	This element contains the default sales process defined for the role.
<code><ns1:ThemeName></ns1:ThemeName></code>	This element contains the theme name defined for the role.
<code><ns1:LeadConversionLayout></ns1:LeadConversionLayout></code>	This element contains the lead conversion layout defined for the role.
<code><ns1:ActionBarLayout>Action Bar Standard Layout</ns1:ActionBarLayout></code>	This element contains the Action bar layout defined for the role.
<code><ns1:ListOfRoleTranslation> <ns1:RoleTranslation> <ns1:LanguageCode>ENU</ns1:LanguageCode> <ns1:RoleName>My Custom Role</ns1:RoleName> </ns1:RoleTranslation> </ns1:ListOfRoleTranslation></code>	This section contains the various translation values of the role.

Table 44. Elements and Sections in Roles XML File

Element or Section Name	Description
<pre> <ns1:ListOfRecordTypeAccess> <ns1:RecordTypeAccess> <ns1:RecordName>CustomObject10</ns1:RecordName> <ns1:HasAccess>true</ns1:HasAccess> <ns1:CanCreate>true</ns1:CanCreate> <ns1:CanReadAll>true</ns1:CanReadAll> </ns1:RecordTypeAccess> <ns1:RecordTypeAccess> <ns1:RecordName>Account</ns1:RecordName> <ns1:HasAccess>true</ns1:HasAccess> <ns1:CanCreate>true</ns1:CanCreate> <ns1:CanReadAll>true</ns1:CanReadAll> </ns1:RecordTypeAccess> </ns1:ListOfRecordTypeAccess> </pre>	<p>This section lists the Record Type Access defined for each record for the role. For more information on mapping the XML values from the <ns1:RecordName> elements to their corresponding UI names, see Table 62 on page 201.</p>
<pre> <ns1:AccessProfile> <ns1:DefaultAccessProfile>Administrator Default Access Profile</ns1:DefaultAccessProfile> <ns1:OwnerAccessProfile>Administrator Owner Access Profile</ns1:OwnerAccessProfile> </ns1:AccessProfile> </pre>	<p>This section contains the access profile that has been assigned to the role.</p>
<pre> <ns1:ListOfPrivilege> <ns1:Privilege> <ns1:PrivilegeName>ACCESS_ATT_EXPORT </ns1:PrivilegeName> <ns1:Enabled>false</ns1:Enabled> </ns1:Privilege> </ns1:ListOfPrivilege> </pre>	<p>This section assigns the privileges to the role. For reference information on privilege IDs, their corresponding names, and descriptions, see Privilege IDs and Their Corresponding Names and Descriptions on page 222.</p>

Table 44. Elements and Sections in Roles XML File

Element or Section Name	Description
<pre> <ns1: TabAccessAndOrder> <ns1: ListOfAvailableTab> <ns1: AvailableTab>Dashboard</ns1: AvailableTab> <ns1: AvailableTab>Forecasts</ns1: AvailableTab> <ns1: AvailableTab>Reports</ns1: AvailableTab> </ns1: ListOfAvailableTab> <ns1: ListOfSelectedTab> <ns1: SelectedTab> <ns1: TabName>Home</ns1: TabName> <ns1: Order>0</ns1: Order> </ns1: SelectedTab> <ns1: SelectedTab> <ns1: TabName>Accounts</ns1: TabName> <ns1: Order>1</ns1: Order> </ns1: SelectedTab> <ns1: SelectedTab> <ns1: TabName>Contacts</ns1: TabName> <ns1: Order>2</ns1: Order> </ns1: SelectedTab> <ns1: SelectedTab> <ns1: TabName>Test</ns1: TabName> <ns1: Order>3</ns1: Order> </ns1: SelectedTab> </ns1: ListOfSelectedTab> </ns1: TabAccessAndOrder> </pre>	<p>This section describes the tab access and order for the role.</p> <p>The <ListOfAvailableTab> section describes the tabs that correspond to the Available Tabs section in the UI.</p> <p>The <List of Selected Tab> section describes the tabs that correspond to the Selected Tabs section in the UI.</p> <p>An order of value 0 (zero) corresponds to the first tab in the Selected Tabs section in the UI.</p> <p>For more information on mapping the XML values from the <ns1:AvailableTab> element and <ns1:TabName> element to their corresponding UI names, see Table 62 on page 201.</p>
<pre> <ns1: ListOfPageLayoutAssignment> <ns1: PageLayoutAssignment> <ns1: RecordType>UserAdmin</ns1: RecordType> <ns1: LayoutName></ns1: LayoutName> <ns1: PageViewType>Static</ns1: PageViewType> </ns1: PageLayoutAssignment> <ns1: PageLayoutAssignment> <ns1: RecordType>Account</ns1: RecordType> <ns1: LayoutName></ns1: LayoutName> <ns1: PageViewType>Static</ns1: PageViewType> </ns1: PageLayoutAssignment> </ns1: ListOfPageLayoutAssignment> </pre>	<p>This section describes the page layout assigned for each record type.</p> <p>If the <LayoutName> element is not specified, then the default layout is applied.</p> <p>For more information on mapping the XML values from the <ns1:RecordType> element to their corresponding UI names, see Table 62 on page 201.</p>
<pre> <ns1: ListOfSearchLayoutAssignment> <ns1: SearchLayoutAssignment> <ns1: RecordType>Account</ns1: RecordType> <ns1: LayoutName>asd</ns1: LayoutName> </ns1: SearchLayoutAssignment> <ns1: SearchLayoutAssignment> <ns1: RecordType>Opportunity</ns1: RecordType> <ns1: LayoutName></ns1: LayoutName> </ns1: SearchLayoutAssignment> </ns1: ListOfSearchLayoutAssignment> </pre>	<p>This section describes the search layout assigned for each role.</p> <p>For more information on mapping the XML values from the <ns1:RecordType> element to their corresponding UI names, see Table 62 on page 201.</p>

Table 44. Elements and Sections in Roles XML File

Element or Section Name	Description
<pre> <ns1:ListOfHomepageLayoutAssignment> <ns1:HomepageLayoutAssignment> <ns1:RecordType>Homepage</ns1:RecordType> <ns1:LayoutName>My Homepage R18 Default Layout </ns1:LayoutName> </ns1:HomepageLayoutAssignment> <ns1:HomepageLayoutAssignment> <ns1:RecordType>Program</ns1:RecordType> <ns1:LayoutName></ns1:LayoutName> </ns1:HomepageLayoutAssignment> <ns1:HomepageLayoutAssignment> <ns1:RecordType>Partner</ns1:RecordType> <ns1:LayoutName></ns1:LayoutName> </ns1:HomepageLayoutAssignment> <ns1:HomepageLayoutAssignment> <ns1:RecordType>Account</ns1:RecordType> <ns1:LayoutName>Account R18 Default Layout </ns1:LayoutName> </ns1:HomepageLayoutAssignment> </ns1:ListOfHomepageLayoutAssignment> </pre>	<p>This section describes the homepage layout assigned for each role.</p> <p>For more information on mapping the XML values from the <code><ns1:RecordType></code> element to their corresponding UI names, see Table 62 on page 201.</p>

Migrating Roles

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate roles:

- [Extracting All Roles on page 123](#)
- [Updating or Inserting a Specific Role \(Upsert\) on page 124](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting All Roles

This topic describes how to extract all roles from your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all roles:

```
migrationtool -u <userID> -s <server URL> ReadAll Role
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

■ *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Roles

The following is an example of extracting all roles from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll Role
```

Updating or Inserting a Specific Role (Upsert)

This topic describes how to update a specific role (if it exists) or insert the role (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific role (if it exists) or insert the role (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert Role <MyRole XML>
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<MyRole XML>* is the fully qualified path name of the role XML file, for example:

```
C:\My Files\MyRole.xml
```

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Role

The following is an example of updating a role (if it exists) or inserting the role (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert Role "C:\My Files\MyRole.xml"
```

NOTE: Quotation marks are required only if the name contains spaces.

16 Migrating Sales Assessment Templates

This chapter describes how to migrate sales assessment templates by using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Sales Assessment Templates on page 125](#)
- [Privileges Required on page 126](#)
- [Elements and Sections in the Sales Assessment Template XML Output File on page 126](#)
- [Migrating Sales Assessment Templates on page 127](#)

Sales Assessment Templates

A *sales assessment template* (or assessment script) is a series of questions that helps Oracle CRM On Demand users to collect customer data. A sales assessment template can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, capture activity information, and so on. For more information, see the topics describing assessment scripts in the *Oracle CRM On Demand Online Help*.

[Table 45](#) describes the Oracle Migration Tool On Demand client commands used with sales assessment templates. For more information on running these commands, see [Migrating Sales Assessment Templates on page 127](#).

Table 45. Commands Used with Sales Assessment Templates in Oracle Migration Tool On Demand

Command	Description
Read SalesAssessmentTemplate <AssessmentType>	This command exports sales assessment template configuration data of the type specified by <AssessmentType>, for example, activity assessment templates, from Oracle CRM On Demand.
ReadAll SalesAssessmentTemplate	This command exports all sales assessment template configuration data in the Oracle CRM On Demand tenant.
Upsert SalesAssessmentTemplate <Path of XML file/XML file name>	This command updates or inserts sales assessment template configuration data in the Oracle CRM On Demand tenant.

NOTE: Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

Privileges Required

The following privileges are required for the user account running the Read, ReadAll, and Upsert commands:

- Enable Web Services Access
- Manage Assessments Access
- Manage Content

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections in the Sales Assessment Template XML Output File

Table 46 describes the elements and sections in the sales assessment template XML output file.

Table 46. Elements and Sections in the Sales Assessment Template XML File

Element or Section Name	Description
<pre> <data: Name>MyAssessment</data: Name> <data: Active>true</data: Active> <data: Filter1></data: Filter1> <data: Filter2></data: Filter2> <data: Filter3></data: Filter3> <data: Filter4></data: Filter4> <data: AttributeValueNumber></data: AttributeValueNumber> <data: ChildScore></data: ChildScore> <data: Description>Sales Assessment</data: Description> <data: FieldtoMapScoreTo> </data: FieldtoMapScoreTo> <data: MaxAttrValue>4</data: MaxAttrValue> <data: MaxPossibleScore></data: MaxPossibleScore> <data: MaxScore></data: MaxScore> <data: ResponseControl>Drop-Down</data: ResponseControl> <data: SalesMethod></data: SalesMethod> <data: SalesStages></data: SalesStages> <data: FieldtoMapOutcomeValueTo> </data: FieldtoMapOutcomeValueTo> <data: RemoveCommentBox>false</data: RemoveCommentBox> <data: OutcomeValueIfThresholdMet> </data: OutcomeValueIfThresholdMet> <data: OutcomeValueIfThresholdNotMet> </data: OutcomeValueIfThresholdNotMet> <data: ThresholdScore>40</data: ThresholdScore> <data: Type>Account Survey</data: Type> <data: TemplateType>Assessment</data: TemplateType> </pre>	<p>This section contains the elements for the <i>Key Assessment Information</i> section of the Assessment Script template.</p>

Table 46. Elements and Sections in the Sales Assessment Template XML File

Element or Section Name	Description
<pre> <data: SalesAssessmentTemplateAttribute> <data: Question></data: Question> <data: CriteriaName></data: CriteriaName> <data: ChildNumber>2</data: ChildNumber> <data: ChildOrder>1</data: ChildOrder> <data: ChildScore>100</data: ChildScore> <data: AnswerMapToField></data: AnswerMapToField> <data: MaxChild>100</data: MaxChild> <data: Order>1</data: Order> <data: ParentType>Account Survey</data: ParentType> <data: Weight>50</data: Weight> <data: WeightScore>5000</data: WeightScore> </pre>	This section contains the elements for the <i>Criteria</i> section of the Assessment Script template.
<pre> <data: ListOfSalesAssessmentAttributeValue> <data: SalesAssessmentAttributeVal ue> <data: Description></data: Description> <data: Order>1</data: Order> <data: Answer></data: Answer> <data: Score>100</data: Score> </data: SalesAssessmentAttributeVal ue> </data: ListOfSalesAssessmentAttributeVal ue></ data: SalesAssessmentTemplateAttribute> </pre>	This section contains the elements for the <i>Answer</i> section of the Assessment Script template.

Migrating Sales Assessment Templates

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate sales assessment templates:

- [Extracting a Sales Assessment Template Configuration on page 127](#)
- [Extracting All Sales Assessment Templates on page 128](#)
- [Updating or Inserting a Specific Sales Assessment Template \(Upsert\) on page 129](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting a Sales Assessment Template Configuration

This topic describes how to extract a set of sales assessment template configuration data from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

NOTE: Users require the [Enable Web Services Access privilege](#) to run the [Read](#) command.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of sales assessment templates:

```
migrationtool -u <userID> -s <server URL> Read SalesAssessmentTemplate  
<AssessmentType>
```

where:

- **<userID>** is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- **<server URL>** is the URL for the Oracle CRM On Demand server where your company resides.
- **<AssessmentType>** is the assessment type for which you want to read a set of sales assessment templates. It can be one of the following types:
 - **ActivityAssessment.** Activity assessment template configuration data.
 - **AccountSurvey.** Account survey assessment template configuration data.
 - **BusinessPlan Assessment.** Business plan assessment template configuration data.
 - **Contact Script.** Contact script assessment template configuration data.
 - **Lead Qualification.** Lead qualification assessment template configuration data.
 - **Objective Assessment.** Objective assessment template configuration data.
 - **Opportunity Assessment.** Opportunity assessment template configuration data.
 - **Service Request - Script.** Service request script assessment template configuration data.
 - **Service Request - Survey.** Service request survey assessment template configuration data.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting Activity Assessment Template

The following is an example of extracting activity assessment template configuration data.

```
migrationtool -u <userID> -s <server URL> Read SalesAssessmentTemplate  
ActivityAssessment
```

Extracting All Sales Assessment Templates

This topic describes how to extract all sales assessment template configuration data from your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all sales assessment template data:


```
migrationtool -u <userID> -s <server URL> ReadAll SalesAssessmentTemplate
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

The output from the Oracle Migration Tool On Demand client is located at:

```
<migration tool install>/repository/SalesAssessmentTemplate/<object>/<assessment name>.xml>
```

For example, when you extract assessments for account survey objects, the output is located at the following location:

```
.../repository/SalesAssessmentTemplate/Account Survey/Account Assessment01.xml
```

Example of Extracting All Sales Assessment Template Configuration Data

The following is an example of extracting all sales assessment templates from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll SalesAssessmentTemplate
```

Updating or Inserting a Specific Sales Assessment Template (Upsert)

This topic describes how to update a specific sales assessment template configuration (if it exists) or insert the sales assessment template configuration (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

NOTE: The Manage Assessments Access and Manage Content privileges are required to run the Upsert operation.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific sales assessment template configuration (if it exists) or insert the sales assessment template configuration (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert SalesAssessmentTemplate
<MySalesAssessmentScript XML>
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.
- `<MySalesAssessmentScript>` is the fully qualified path name of the sales assessment template XML file, for example:

`C:\My Files\MySalesAssessmentScript.xml`

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting Sales Assessment Template Configuration Data

The following is an example of updating sales assessment template configuration (if it exists) or inserting the sales assessment template configuration (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert SalesAssessmentTemplate  
"C:\My Files\MySalesAssessmentTemplate.xml "
```

NOTE: Quotation marks are required if the file name or path contains spaces.

17 Migrating Workflow Rules and Action Sets

This chapter describes how to migrate workflow rules and action sets by using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Workflow Rules on page 131](#)
- [Workflow Action Sets on page 133](#)
- [Privileges Required on page 134](#)
- [Elements and Sections of Workflow Rules Output File on page 135](#)
- [Elements and Sections of Workflow Action Sets Output File on page 136](#)
- [Migrating Workflow Rules on page 143](#)
- [Migrating Workflow Action Sets on page 147](#)

Workflow Rules

A *workflow rule* is an instruction to Oracle CRM On Demand to perform one or more actions automatically, each time a specified event occurs. [Table 47](#) describes the Oracle Migration Tool On Demand client commands that are used with workflow rules. The commands are case-sensitive. For examples of running these commands, see [Migrating Workflow Rules on page 143](#).

Table 47. Oracle Migration Tool On Demand Commands for Workflow Rules

Command	Description
Read WorkflowRuleSet <RecordType> <TriggerEvent> [<ParentRecordType>]	<p>This command exports a set of workflow rules from an Oracle CRM On Demand server.</p> <p>where:</p> <ul style="list-style-type: none">■ <i>RecordType</i> is the record type for the set of workflow rules.■ <i>TriggerEvent</i> is the code for the trigger event code, see Table 48 on page 133.■ <i>ParentRecordType</i> is the parent record type for the workflows. This parameter is optional. You can provide this parameter if the workflow has a parent record and the trigger event is Associate or Dissociate. <p>The Read command exports all workflows in a sequence that are based on the same record type, trigger event, and optional parent record type parameter.</p>

Table 47. Oracle Migration Tool On Demand Commands for Workflow Rules

Command	Description
ReadAll WorkflowRuleSet	This command exports all workflow rules from an Oracle CRM On Demand server.
Upsert WorkflowRuleSet <path>/<filename>.xml	This command updates or inserts a set of workflow rules on an Oracle CRM On Demand server.
Delete WorkflowRuleSet <RecordType> <TriggerEvent> [<ParentRecordType>]	<p>This command deletes the specified workflow rules from an Oracle CRM On Demand server.</p> <p>where:</p> <ul style="list-style-type: none"> ■ <i>RecordType</i> is the record type for the set of workflow rules. ■ <i>TriggerEvent</i> is the code for the trigger event code, see Table 48 on page 133. ■ <i>ParentRecordType</i> is the parent record type for the workflow. This parameter is optional. You can provide this parameter if the workflow has a parent record and the trigger event is Associate or Dissociate.

The output from the extraction is saved to the <TriggerEvent>.xml file as follows:

- If the *ParentRecordType* parameter is a null value, then the output is saved to the following directory:

```
<migration tool install>/repository/WorkflowRuleSet/<RecordType>
```
- If the *ParentRecordType* parameter is not a null value, then the output is saved to the following directory:

```
<migration tool install>/repository/WorkflowRuleSet/<RecordType>/<ParentRecordType>
```

The directory structure is automatically created. The structure is based on the unique combination of the record type, and parent record type, if applicable, and the trigger event. The exported XML files do not contain any workflow rule set that is based on a different record type or trigger event.

Limitations of the Upsert Operation

The Upsert operation has the following limitations:

- The workflow rules are ordered as they appear in the input XML file.
- You cannot upsert two workflow rules with the same order.
- If the workflow rule name does not match an existing workflow rule name, then a new workflow rule is created.

- If the workflow rule name matches an existing workflow rule name, then the record type and trigger event cannot be modified.
- The migration service protects data from getting corrupted if the workflow rule is edited during loading, or loaded twice simultaneously, or extracted while it is being loaded.
- The input file name must contain only the workflows that are based on a unique combination of a record type and trigger event. For example, the input file name can have one or many workflows based on the Account record type and the trigger event (When New Record Is Saved). The input file cannot contain another workflow with a different record type or trigger event.
- The user running the Upsert command must have access to the object so that the Upsert command completes successfully.

Table 48 maps the workflow trigger events to the trigger event language independent code (LIC).

Table 48. Workflow Trigger Events

Trigger Event	Trigger Event Language Independent Code
When new record is saved	WriteRecordNew
When modified record is saved	WriteRecordUpdated
Before modified record is saved	PreWriteRecord
Before record is deleted	PreDeleteRecord
After association with parent	Associate
After dissociation with parent	Dissociate
When record is restored	RestoreRecord
When records are merged	MergeRecords

Workflow Action Sets

A *workflow action set* is an ordered series of workflow actions of different types. The complete set of workflow actions are: CreateTask, Wait, SendEmail, CreateIntegrationEvent, FieldUpdate, AssignBook, SyncOwnerPartner, SyncBookPartner, and SyncPartnerBooks. For more information on workflow actions, see *Oracle CRM On Demand Online Help*.

Table 49 describes the Oracle Migration Tool On Demand client commands that are used with workflow action sets. The commands are case-sensitive. For examples of running these commands, see [Migrating Workflow Action Sets on page 147](#).

Table 49. Oracle Migration Tool On Demand Commands for Workflow Action Sets

Command	Description
Read WorkflowActionSet <WorkflowRuleName>	This command exports all the actions for a specified workflow name from an Oracle CRM On Demand server.
ReadForRuleSet WorkflowActionSet <RecordType> <TriggerEvent>	This command exports all the actions for each workflow that is based on the specified record type and trigger event from an Oracle CRM On Demand server.
Upsert WorkflowActionSet <path>/<filename>.xml	This command updates or inserts a workflow action set on an Oracle CRM On Demand server.

Privileges Required

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert command: Manage Data Rules - Manage Workflow Rules and Workflow Cancel Save (if applicable).

The Workflow Cancel Save privilege is required if the trigger event for the workflow rule is Before Modified Record Saved and the Cancel Save option is available for the record type. The Workflow Cancel Save privilege is not required for the Opportunity record type because the Cancel Save option is available with the Manage Data Rules - Manage Workflow Rules privilege.

For information on setting and checking privileges, see *Oracle CRM On Demand Online Help*.

Elements and Sections of Workflow Rules Output File

Table 50 describes the elements of the workflow rules XML output file.

Table 50. Workflow Rules XML File Elements and Sections

Element	Description
<code><data: RecordType>Opportunity</data: RecordType></code>	This element specifies the record type on which the workflows are defined.
<code><data: TriggerEvent>WriteRecordNew</data: TriggerEvent></code>	This element specifies the trigger event code that triggers the workflow.
<code><data: ParentRecordType></data: ParentRecordType></code>	(Optional.) This element specifies the name of the parent record type. It is specified if the trigger event is Associate or Dissociate. See <i>Oracle CRM On Demand Online Help</i> or the Workflow UI for the valid combination of recordType, TriggerEvent, and ParentRecordType.

Table 51 describes the sections of the workflow rules XML file.

Table 51. Workflow Rules XML File Sections

Section	Description
<pre> <data: WorkflowRule> <data: WorkflowName>Opportunity Approval </data: WorkflowName> <data: Active>true</data: Active> <data: Exit>false</data: Exit> <data: WorkflowRuleCondition></data: WorkflowRuleCondition> <data: CancelSave>false</data: CancelSave> <data: DisplayMessage></data: DisplayMessage> </data: WorkflowRule> <data: workflowRule> <data: workflowName>Opportunity Approval 2</data: workflowName> <data: Active>false</data: Active> <data: Exit>false</data: Exit> <data: workflowRuleCondition></data: workflowRuleCondition> <data: CancelSave>false</data: CancelSave> <data: DisplayMessage></data: DisplayMessage> </data: WorkflowRule> </pre>	<p>This section specifies the elements required for each workflow:</p> <ul style="list-style-type: none"> ■ <WorkflowName> specifies the name of the workflow. This field has a maximum of 50 characters. ■ <Active> is set to True or False. ■ <Exit> is the exit field in the user interface. You can set it to True or False. ■ <WorkflowRuleCondition> is a valid expression, as defined in the <i>Oracle CRM On Demand Online Help</i>, that defines a rule for performing workflow actions. This field has a maximum of 1024 characters. ■ <CancelSave> is set to True or False. The Workflow Cancel Save privilege is required to change this field during an upsert operation. ■ <DisplayMessage> contains the text messages displayed if <cancelSave> is set to True. The Workflow Cancel Save privilege is required to upsert a workflow rule set that contains the <CancelSave> tag. This field has a maximum of 1999 characters.

Elements and Sections of Workflow Action Sets Output File

The following topics describe the elements and sections for various workflow action sets:

- [Send Email Workflow Action Set on page 137](#)
- [Create Task Workflow Action Set on page 139](#)

- [Wait Action Workflow Action Set on page 140](#)
- [Field Update Workflow Action Set on page 141](#)
- [Integration Event Workflow Action Set on page 142](#)

Send Email Workflow Action Set

[Table 52](#) describes the elements or sections in the Send Email workflow action set XML output file.

Table 52. Send Email Workflow Action XML File Elements

Element or Section	Description
<code><data: WorkflowName>Opportunity </data: WorkflowName></code>	This element contains the name of the workflow rule with which this action is associated. When performing an insert operation for WorkflowActions, this name is used to find a matching workflow rule.

Table 52. Send Email Workflow Action XML File Elements

Element or Section	Description
<pre> <data: WorkflowAction> <data: Name>NewOpportunity</data: Name> <data: Active>true</data: Active> <data: WorkflowSendEmailAction> <data: FromType>FROM_EMAIL_ADDRESS </data: FromType> <data: From /> <data: ToType>R</data: ToType> <data: To>0_Primary Owner Id</data: To> <data: Subject> </data: Subject> <data: MessageBody> </data: MessageBody> </data: WorkflowSendEmailAction> </data: WorkflowAction> </pre>	<p>This section contains the Send Email Workflow action:</p> <p><data: FromType>. This element corresponds to the From field in the user interface (UI). It indicates the source of the From email address. The valid options are:</p> <ul style="list-style-type: none"> ■ FROM_EMAIL_ADDRESS. This value corresponds to the Current User option in the user interface. ■ FROM_DEFAULT. This value corresponds to the Default Email Address option in the UI. ■ SPECIFIC_EMAIL_ADDRESS. This value corresponds to the Specific Email Address option in the UI. <p><data: From>. This element contains the From email address when FromType is set to: Specific Email Address.</p> <p><data: ToType>. This element corresponds to the To field in the user interface. It indicates the type of the To Email address. The valid options are:</p> <ul style="list-style-type: none"> ■ R. Corresponds to the Relative User on Record option in the user interface. ■ U. Corresponds to the Specific User option in the user interface. ■ E. Corresponds to the Specific Email Address option in the user interface. <p><data: To>. This element's value depends on the ToType element:</p> <ul style="list-style-type: none"> ■ If the ToType element is set to Specific User, then this element contains the User ID of the user. ■ If the ToType element is set to Relative User on Record, then the value of this element is defined, see Table 54 on page 139. ■ If the ToType element is set to a specific Email Address, then this element contains the expression defined for specific email addresses.

Create Task Workflow Action Set

Table 53 describes the elements or sections in the Create Task workflow action set XML output file.

Table 53. Create Task Workflow Action Set XML File Elements

Element or Section	Description
<pre><data: WorkflowName>Opportunity </data: WorkflowName></pre>	<p>This element contains the name of the workflow rule with which this action is associated. When performing an insert operation for WorkflowActions, this name is used to find a matching workflow rule.</p>
<pre><data: WorkflowAction> <data: Name>CreatetaskTest</data: Name> <data: Active>false</data: Active> <data: WorkflowCreateTaskAction> <data: Owner>O_Primary Owner Id</data: Owner> <data: OwnerType>R</data: OwnerType> <data: Type>Approval</data: Type> <data: DueDate></data: DueDate> <data: Priority>2-Medium</data: Priority> <data: Status>Not Started</data: Status> <data: TaskCurrency>CAD</data: TaskCurrency> <data: Private>false</data: Private> <data: Subject> </data: Subject> <data: Description></data: Description> </data: WorkflowCreateTaskAction> </data: WorkflowAction></pre>	<p>This section contains the Create Task Workflow action elements:</p> <ul style="list-style-type: none"> ■ <data:OwnerType>. Corresponds to the Owner field in the user interface. The valid values are: <ul style="list-style-type: none"> ■ R. Corresponds to the Relative User On Record option in the user interface. ■ U. Corresponds to the Specific User option in the user interface. ■ <data:Owner>. This element's value depends on the OwnerType: <ul style="list-style-type: none"> ■ If the OwnerType element is set to Specific User, then this element contains the name of the user. ■ If the OwnerType element is set to Relative User On Record, then the value of this element is defined, see Table 54.

Table 54 maps the system name for the owner that appears in the XML file to the display name in the user interface if the OwnerType element is set to R.

Table 54. System Names for the Owner Element if the Owner Type is R

System Name in the XML File	Display Name
C_	Service Request Created By
MA_Account Id	Account Owner's Manager
M_Owned By Id	<Object> Owner's Manager
M_Owner Id	Lead Owner's Manager
M_Primary HH Owner Id	Household Owner's Manager

Table 54. System Names for the Owner Element if the Owner Type is R

System Name in the XML File	Display Name
M_Primary Owner Id	< <i>Object</i> > Owner's Manager
M_Sales Rep Id	Salesperson's Manager
OA_Account Id	Account Owner
O_Owned By Id	Service Request Owner
O_Owner Id	Lead Owner
O_Primary HH Owner Id	Household Owner
O_Primary Owner Id	< <i>Object</i> > Owner
O_Sales Rep Id	Salesperson
T_Team Role_Consultant	< <i>Object</i> > Team - Consultant
T_Team Role_Executive Sponsor	< <i>Object</i> > Team - Executive Sponsor
T_Team Role_Other	< <i>Object</i> > Team - Other
T_Team Role_Owner	< <i>Object</i> > Team - Owner
T_Team Role_Partner	< <i>Object</i> > Team - Partner

Wait Action Workflow Action Set

[Table 55](#) describes the elements or sections in the Wait Action workflow action set XML output file.

Table 55. Wait Action Workflow Action Set XML File Elements

Element or Section	Description
<data: WorkflowName>Opportunity </data: WorkflowName>	This element contains the name of the workflow rule with which this action is associated. When performing an insert operation for WorkflowActions, this name is used to find a matching workflow rule.

Table 55. Wait Action Workflow Action Set XML File Elements

Element or Section	Description
<pre> <data: WorkflowAction> <data: Name>WaitForApproval </data: Name> <data: Active>true</data: Active> <data: WorkflowWaitAction> <data: ReevaluateRuleConditionsAfterWait>true </data: ReevaluateRuleConditionsAfterWait> <data: WaitType>Period</data: WaitType> <data: DateTime></data: DateTime> <data: WaitExpression>PYM10DTHM </data: WaitExpression> </data: WorkflowWaitAction> </data: WorkflowAction> </pre>	<p>This section contains the Wait Action elements.</p> <ul style="list-style-type: none"> ■ <data:WaitType>. This element specifies the type of wait period selected in the user interface. The values that are valid are: <ul style="list-style-type: none"> ■ Period ■ Period Expression ■ Data Time ■ Date Time Expression ■ <data:WaitExpression>. The value of this element depends on the <data: WaitType> element. When the <data: WaitType> value is Period, the <data: WaitExpression> indicates the period as PYMDTHM. For example: <ul style="list-style-type: none"> ■ PYM10DTHM indicates 10 days. ■ P1Y3MDTHM indicates 1 year and 3 months. ■ PYMDT5H15M indicates 5 hours and 15 minutes.

Field Update Workflow Action Set

Table 56 describes the elements or sections in the Field Update workflow action set XML output file.

Table 56. Field Update Workflow Action Set XML File Elements

Element or Section	Description
<pre> <data: WorkflowName>Opportunity </data: WorkflowName> </pre>	<p>This element contains the name of the workflow rule with which this action is associated. When performing an insert operation for WorkflowActions, this name is used to find a matching workflow rule.</p>

Table 56. Field Update Workflow Action Set XML File Elements

Element or Section	Description
<pre> <data: WorkflowAction> <data: Name>Update Revenue</data: Name> <data: Active>true</data: Active> <data: WorkflowFieldUpdateAction> <data: FieldName>Total Assets</data: FieldName> <data: Value>' 10000' </data: Value> <data: OverwriteExistingValues>true </data: OverwriteExistingValues> </data: WorkflowFieldUpdateAction> </data: WorkflowAction> </pre>	<p>This section contains the Field Update Workflow action elements. A Field Update Workflow action must be preceded by at least one Wait action.</p>

Integration Event Workflow Action Set

Table 57 describes the elements or sections in the Integration Event workflow action set XML output file.

Table 57. Integration Event Workflow Action Set XML File Elements

Element or Section	Description
<pre> <data: WorkflowName>Opportunity</data: WorkflowName> </pre>	<p>This element contains the name of the workflow rule with which this action is associated. When performing an insert operation for WorkflowActions, this name is used to find a matching workflow rule.</p>
<pre> <data: WorkflowAction> <data: Name>EventQueue</data: Name> <data: Active>true</data: Active> <data: WorkflowCreateIntegrationEventAction> <data: ListOfQueues> <data: QueueName>Default Queue</data: QueueName> </data: ListOfQueues> <data: ListOfFields> <data: FieldName>Currency Code</data: FieldName> <data: AlwaysInclude>true</data: AlwaysInclude> <data: TrackChanges>true</data: TrackChanges> </data: ListOfFields> </data: WorkflowCreateIntegrationEventAction> </data: WorkflowAction> </pre>	<p>This section contains the Integration Event Workflow action elements.</p>

Migrating Workflow Rules

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with workflow rules:

- [Extracting a Workflow Rule Set](#)
- [Extracting All Workflow Rule Sets](#)
- [Updating or Inserting a Workflow Rule \(Upsert\)](#)
- [Deleting a Workflow Rule Set](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting a Workflow Rule Set

This topic describes how to extract a workflow rule set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to the `<TriggerEvent>.xml` file in the following directory:

- If the *ParentRecordType* parameter is a null value, then the output from the extract is saved to the following directory:

```
<migration tool install>/repository/WorkflowRuleSet/<RecordType>
```

- If the *ParentRecordType* parameter is not a null value, then the output from the extract is saved to the following directory:

```
<migration tool install>/repository/WorkflowRuleSet/<RecordType>/  
<ParentRecordType>
```

If the workflow rule set has multiple parent record types, then only the relative order changes.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a workflow rule set:

```
migrationtool -u <userID> -s <server URL> Read WorkflowRuleSet <RecordType>  
<TriggerEvent> [<ParentRecordType>]
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<RecordType>* is the external name of the Oracle CRM On Demand record (or object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *<TriggerEvent>* is the language independent code (LIC) for the event type, see [Table 48 on page 133](#).

- `<ParentRecordType>` is the external name of the Oracle CRM On Demand record (or object). If the string contains spaces, then it must be enclosed with quotation marks.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting a Workflow Rule Set

The following is an example of extracting the entire sequence of workflow rules based on the Account record type and the trigger event (Before Modified Record Is Saved):

```
migrationtool -u <userID> -s <server URL> Read WorkflowRuleSet Account
PreWriteRecord
```

Extracting All Workflow Rule Sets

This topic describes how to extract all workflow rule sets from your Oracle CRM On Demand environment; that is, a customer test environment or production environment. The output from the extract is saved to the `<TriggerEvent>.xml` file in the following directory:

- If the `ParentRecordType` parameter is a null value, then the output is saved to the following directory:
`<migration tool install>/repository/WorkflowRuleSet/<RecordType>`
- If the `ParentRecordType` parameter is not a null value, then the output is saved to the following directory:
`<migration tool install>/repository/WorkflowRuleSet/<RecordType>/<ParentRecordType>`

The number of records returned is not limited for the `ReadAll` command. If the workflow rule set has multiple parent record types, then only the relative order changes. You must correct this error by using the workflow functionality of Oracle CRM On Demand.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all workflow rule sets:

```
migrationtool -u <userID> -s <server URL> ReadAll WorkflowRuleSet
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting All Workflow Rule Sets

The following is an example of extracting all workflow rule sets from your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> ReadAll WorkflowRuleSet
```

Updating or Inserting a Workflow Rule (Upsert)

This topic describes how to update a specific workflow rule (if it exists) or insert that workflow rule (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *upsert operation*. It is specified using the Upsert command.

About the Upsert Operation

When you run the Upsert command, the existing workflows are updated, new workflow rules are inserted, and rules that are not in the request are deleted. The order of the rules in the workflow request must match the order of the rules for the workflow result in the Oracle CRM On Demand application. The changes following the upsert operation are applied completely or not at all.

Limitations of the Upsert Operation

The following limitations apply:

- Rules are ordered as they appear in the XML file.
- You cannot upsert two workflow rules with the same order.
- If the workflow rule name does not match an existing workflow rule name, then a new workflow rule is created.
- If the workflow rule name matches an existing workflow rule name, then the record type and trigger event cannot be modified.
- The Oracle Migration Tool On Demand client prevents data corruption if the workflow rule is edited during loading, loaded twice simultaneously, or extracted while it is being loaded.
- The input file name must contain only workflows that are based on a unique combination of a record type and trigger event. For example, the input file name can have one or many workflows based on the Account record type and trigger event (When New Record Is Saved). The input file cannot contain a workflow with a different record type or trigger event.
- The user running the Upsert command must have access to the object for the operation to complete successfully.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific workflow rule (if it exists) or to insert the workflow rule (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert WorkflowRuleSet <WorkflowRules XML>
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.
- `<WorkflowRules XML>` is the fully qualified path name of the workflow rules XML file, for example:

C:\My Files\My WorkflowRules.xml

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Workflow Rule

The following is an example of updating a specific access profile (if it exists) or inserting that access profile (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert WorkflowRuleSet  
"C:\My Files\My WorkflowRules.xml "
```

NOTE: Quotation marks are required if the name consists of spaces.

Deleting a Workflow Rule Set

This topic describes how to delete a workflow rule set based on the specified record type and trigger event. The set of workflow rules is deleted from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

NOTE: The delete operation can delete any existing workflow rule set even if the authenticated user does not have access to the object.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to delete a workflow rule set:

```
migrationtool -u <userID> -s <server URL> Delete WorkflowRuleSet <RecordType>  
<TriggerEvent> [<ParentRecordType>]
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.
- `<RecordType>` is the external name of the Oracle CRM On Demand record (or object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.

- `<TriggerEvent>` is the language independent code (LIC) for the event type, see [Table 48 on page 133](#).
- `<ParentRecordType>` is the external name of the Oracle CRM On Demand record (or object). If the string contains spaces, then it must be enclosed with quotation marks.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Deleting a Workflow Rule Set

The following is an example of deleting the entire sequence of workflow rules based on the Account record type and the trigger event (Before Modified Record Is Saved):

```
mi grati ontool -u <userID> -s <server URL> Delete Workfl owRul eSet Account
PreWri teRecord
```

Migrating Workflow Action Sets

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with workflow action sets:

- [Extracting a Workflow Action Set](#)
- [Extracting Workflow Action Sets That Are Related to a Workflow Rule Set](#)
- [Updating or Inserting a Workflow Action Set \(Upsert\)](#)

NOTE: Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

Extracting a Workflow Action Set

This topic describes how to extract a single workflow action set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
/Workfl owActi onSet/<Workfl owRul eName>. xml
```

Authenticated users can extract a specific workflow action set. The Read operation can read any existing action set even if the authenticated user does not have access to the object or trigger event for the specified workflow.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific workflow action set:

```
mi grati ontool -u <userID> -s <server URL> Read Workfl owActi onSet <Workfl owRul eName>
```

where:

- `<userID>` is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- `<server URL>` is the URL for the Oracle CRM On Demand server where your company resides.
- `<WorkflowRuleName>` is the name of a workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting a Single Workflow Action Set

The following is an example of extracting a specific workflow rule:

```
mi grati ontool -u <userID> -s <server URL> Read Workfl owActi onSet MyWorkFl owRul e
```

NOTE: Quotation marks are required if the workflow rule contains spaces.

Extracting Workflow Action Sets That Are Related to a Workflow Rule Set

This topic describes how to extract all action sets that are related to a rule set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

One WorkflowActionSet.xml file is extracted for each action set identified by the input record type, trigger event, and parent record type. The output for each action set matches the data that is extracted if a specific Read operation is used to retrieve the action set.

The output WorkflowActionSet.xml file is saved to the following directory:

- If the parent record type is a null value, then the output is saved to the following directory:

```
<migrati on tool install>/reposit ory/Workfl owActi onSet/<RecordType>/  
<TriggerEvent>. xml
```

- If the parent record type is not a null value, then the output is saved to the following directory:

```
<migrati on tool install>/reposit ory/Workfl owActi onSet/<RecordType>/  
<ParentRecordType>/<TriggerEvent>. xml
```

Authenticated users can extract a specific workflow action set. The Read operation can read any existing action set even if the authenticated user does not have access to the object or trigger event for the specified workflow.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract workflow action sets that are related to a workflow rule set:

```
migrationtool -u <userID> -s <server URL> ReadForRuleSet WorkflowActionSet
<RecordType> <TriggerEvent> [<ParentRecordType>]
```

where:

- *<userID>* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *<server URL>* is the URL for the Oracle CRM On Demand server where your company resides.
- *<RecordType>* is the external name of the Oracle CRM On Demand record (or object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *<TriggerEvent>* is the language independent code (LIC) for the event type, see [Table 48 on page 133](#).
- *<ParentRecordType>* is the external name of the Oracle CRM On Demand record (or object). If the string contains spaces, then it must be enclosed with quotation marks.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Extracting Workflow Action Sets That Are Related to a Workflow Rule Set

The following is an example of extracting workflow action sets that are related to a workflow rule set, when a new Account record is saved:

```
migrationtool -u <userID> -s <server URL> ReadForRuleSet WorkflowActionSet
Account WriteRecordNew
```

Updating or Inserting a Workflow Action Set (Upsert)

This topic describes how to update a specific workflow action set (if it exists) or to insert that workflow action set (if it does not exist) on your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *upsert operation*. It is specified by using the Upsert command.

Running an upsert operation on a workflow action set is a synchronization operation. At the end of the operation, the workflow action set matches the action set in the XML file, where possible. Existing workflow actions are updated, new actions are inserted, and actions that are not in the request are deleted. The order of the actions in the workflow request match the order of the actions in the action set XML file. The updates to workflow action sets in an upsert operation are applied completely or not at all.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific workflow action set (if it exists) or to insert the workflow action set (if it does not exist):

```
migrationtool -u <userID> -s <server URL> Upsert WorkflowActionSet  
<WorkflowActionSet XML>
```

where:

- <userID> is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- <server URL> is the URL for the Oracle CRM On Demand server where your company resides.
- <WorkflowActionSet XML> is the fully qualified path name of the workflow action set XML file, for example:

```
C:\My Files\My WorkflowActionSet.xml
```

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

Example of Updating or Inserting a Workflow Action Set

The following is an example of updating a specific workflow action set (if it exists) or inserting that workflow action set (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u <userID> -s <server URL> Upsert WorkflowActionSet  
"C:\My Files\My WorkflowActionSet.xml"
```

NOTE: Quotation marks are required if the file name consists of spaces.

18 Replicating Configuration Data from a Source Environment to a Target Environment

This chapter describes how to migrate all or selective configuration data from a source environment to a target environment of Oracle CRM On Demand. It includes the following topics:

- [Replicating All Configuration Data from a Source Environment to a Target Environment on page 151](#)
- [Replicating Selective Configuration Data from a Source Environment to a Target Environment on page 156](#)

Replicating All Configuration Data from a Source Environment to a Target Environment

This topic describes the Oracle Migration Tool On Demand client commands that you run to replicate all the configuration data from a source environment to a target environment of Oracle CRM On Demand.

CAUTION: Most components of Oracle CRM On Demand cannot revert to their original states by using the backup copies of the configuration data. For example, after a new access profile is inserted into the target environment, it cannot be removed by using the backup copy (that is, access profiles in Oracle CRM On Demand cannot be deleted). A backup copy of the configuration data provides a reference of the target environment before applying new configuration data.

NOTE: In the following examples, the Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

To replicate all configuration data from a source environment to a target environment

- 1 Open a command line window on the computer where you have installed the Oracle Migration Tool On Demand client, and navigate to the directory where you have installed it, for example:

```
C:\Oracle Migration Tool On Demand
```

- 2 Back up the existing configuration data in the target environment by running the following commands:

```
migrationtool -u <UserID> -s <target server> ReadAll AccessProfile
```

```
migrationtool -u <userID> -s <target server> ReadAll ActionBarCustomWebApplet
```

```
migrationtool -u <userID> -s <target server> ReadAll ActionBarLayout
```

```
migrationtool -u <userID> -s <target server> ReadAll CascadingPicklist
```

Replicating Configuration Data from a Source Environment to a Target Environment

■ Replicating All Configuration Data from a Source Environment to a Target Environment

```
migratontool -u <UserID> -s <target server> ReadAll CustomRecordType
migratontool -u <userID> -s <target server> ReadAll CustomWebLink
migratontool -u <UserID> -s <target server> ReadAll CustomWebTab
migratontool -u <userID> -s <target server> ReadAll DetailPageCustomWebApplet
migratontool -u <UserID> -s <target server> ReadAll FieldManagement
migratontool -u <userID> -s <target server> ReadAll HomePageCustomWebApplet
migratontool -u <userID> -s <target server> ReadAll HomepageLayout
migratontool -u <userID> -s <target server> ReadAll HomeTabCustomWebApplet
migratontool -u <userID> -s <target server> ReadAll PageLayoutField
migratontool -u <userID> -s <target server> ReadAll
    PageLayoutRelatedInformation
migratontool -u <userID> -s <target server> ReadAll PageLayoutSection
migratontool -u <UserID> -s <target server> ReadAll Picklist
migratontool -u <userID> -s <target server> ReadAll RelatedInformationLayout
migratontool -u <userID> -s <target server> ReadAll Role
migratontool -u <userID> -s <target server> ReadAll SalesAssessmentTemplate
migratontool -u <userID> -s <target server> ReadAll WorkflowRuleSet
```

where:

- *<userID>* is the customer administration user's sign-in ID for the Oracle CRM On Demand target environment where the extraction occurs.
- *<target server>* is the URL for the Oracle CRM On Demand target server for the target environment.

In addition, back up all workflow action sets for each of the object names and trigger events that exist on the target server:

```
migratontool -u <userID> -s <target server> ReadForRuleSet WorkflowActionSet
    <RecordType> <TriggerEvent> [<ParentRecordType>]
```

For more details on extracting workflow action sets, see [Extracting a Workflow Action Set on page 147](#).

3 Retrieve all configuration data from the source environment by running the following commands:

```
migratontool -u <UserID> -s <source server> ReadAll AccessProfile
migratontool -u <userID> -s <source server> ReadAll ActionBarCustomWebApplet
migratontool -u <userID> -s <source server> ReadAll ActionBarLayout
migratontool -u <userID> -s <source server> ReadAll CascadingPicklist
```


Replicating Configuration Data from a Source Environment to a Target Environment

■ Replicating All Configuration Data from a Source Environment to a Target Environment

```
migratontool -u <UserID> -s <source server> ReadAll CustomRecordType
migratontool -u <userID> -s <source server> ReadAll CustomWebLink
migratontool -u <UserID> -s <source server> ReadAll CustomWebTab
migratontool -u <userID> -s <source server> ReadAll DetailPageCustomWebApplet
migratontool -u <UserID> -s <source server> ReadAll FieldManagement
migratontool -u <userID> -s <source server> ReadAll HomePageCustomWebApplet
migratontool -u <userID> -s <source server> ReadAll HomepageLayout
migratontool -u <userID> -s <source server> ReadAll HomeTabCustomWebApplet
migratontool -u <userID> -s <source server> ReadAll PageLayoutField
migratontool -u <userID> -s <source server> ReadAll
    PageLayoutRelatedInformation
migratontool -u <userID> -s <source server> ReadAll PageLayoutSection
migratontool -u <UserID> -s <source server> ReadAll Picklist
migratontool -u <userID> -s <source server> ReadAll RelatedInformationLayout
migratontool -u <userID> -s <source server> ReadAll Role
migratontool -u <userID> -s <source server> ReadAll SalesAssessmentTemplate
migratontool -u <userID> -s <source server> ReadAll WorkflowRuleSet
```

where:

- *<userID>* is the customer administration user's sign-in ID for the Oracle CRM On Demand source environment where the extraction occurs.
- *<source server>* is the URL for the Oracle CRM On Demand source server for the source environment.

In addition, extract all workflow action sets for each of the object names and trigger events that exist on the source server:

```
migratontool -u <userID> -s <source server> ReadForRuleSet WorkflowActionSet
    <RecordType> <TriggerEvent> [<ParentRecordType>]
```

For more details on extracting workflow action sets, see [Extracting a Workflow Action Set on page 147](#).

- 4 Perform an upsert operation for each XML file to the target environment by running the following commands:

```
migratontool -u <userID> -s <target server> Upsert AccessProfile
    <Access Profile XML>

migratontool -u <userID> -s <target server> Upsert ActionBarCustomWebApplet
    <ActionBarCustomWebApplet XML>
```

Replicating Configuration Data from a Source Environment to a Target Environment

■ Replicating All Configuration Data from a Source Environment to a Target Environment

```
migrationtool -u <userID> -s <target server> Upsert ActionBarLayout
<Action Bar Layout XML>

migrationtool -u <userID> -s <target server> Upsert CascadingPicklist
<CascadingPicklist XML>

migrationtool -u <userID> -s <target server> Upsert CustomRecordType
<Custom Record Type XML>

migrationtool -u <userID> -s <target server> Upsert CustomWebTab
<Custom Web Tab XML>

migrationtool -u <userID> -s <target server> Upsert CustomWebLink
<Custom Web Link XML>

migrationtool -u <userID> -s <target server> Upsert DetailPageCustomWebApplet
<DetailPageCustomWebApplet XML>

migrationtool -u <userID> -s <target server> Upsert FieldManagement
<Field Management XML>

migrationtool -u <userID> -s <target server> Upsert HomepageCustomWebApplet
<HomepageCustomWebApplet XML>

migrationtool -u <userID> -s <target server> Upsert HomepageLayout
<HomepageLayout XML>

migrationtool -u <userID> -s <target server> Upsert HomeTabCustomWebApplet
<HomeTabCustomWebApplet XML>

xmigrationtool -u <userID> -s <target server> Upsert PageLayoutField
<Page Layout Field XML>

migrationtool -u <userID> -s <target server> Upsert PageLayoutRelatedInformation
<Page Layout Related XML>

migrationtool -u <userID> -s <target server> Upsert PageLayoutSection
<Page Layout Section XML>

migrationtool -u <userID> -s <target server> Upsert Picklist <Picklist XML>

migrationtool -u <userID> -s <target server> Upsert RelatedInformationLayout
<RelatedInfoLayout XML>

migrationtool -u <userID> -s <target server> Upsert Role <Role XML>

migrationtool -u <userID> -s <target server> Upsert SalesAssessmentTemplate
<SalesAssessmentScript XML>

migrationtool -u <userID> -s <target server> Upsert WorkflowActionSet
<WorkflowActionSet XML>

migrationtool -u <userID> -s <target server> Upsert WorkflowRules
<WorkflowRules XML>
```

where:

Replicating Configuration Data from a Source Environment to a Target Environment

■ Replicating All Configuration Data from a Source Environment to a Target Environment

- *<userID>* is the customer administration user's sign-in ID for the Oracle CRM On Demand environment where the upsert operation occurs.
- *<target server>* is the URL for the Oracle CRM On Demand target server for the target environment.
- *<Access Profile XML>* is the fully qualified path name of the access profile XML file, for example, C:\Oracle Migration Tool on Demand\repository\AccessProfile\MyCustomProfile.xml
- *<ActionBarCustomWebApplet XML>* is the fully qualified path name of the Action bar customized Web applet XML file, for example, C:\My Files\MyActionBarCustomWebApplet.xml
- *<Action Bar Layout XML>* is the fully qualified path name of the Action Bar layout XML file, for example, C:\My Files\MyActionBarLayout.xml
- *<CascadingPicklist XML>* is the fully qualified path name of the cascading picklist XML file, for example, C:\My Files\MyCascadingPicklist.xml
- *<Custom Record Type XML>* is the fully qualified path name of the custom record type XML file, for example, C:\Oracle Migration Tool on Demand\repository\CustomRecordType\MyCustomRecordType.xml
- *<Custom Web Link XML>* is the fully qualified path name of the custom Web link XML file, for example, C:\My Files\MyCustomWebLink.xml
- *<Custom Web Tab XML>* is the fully qualified path name of the custom Web tab XML file, for example, C:\Oracle Migration Tool on Demand\repository\CustomWebTab\MyCustomWebTab.xml
- *<DetailPageCustomWebApplet XML>* is the fully qualified path name of the Detail page customized Web applet XML file, for example, C:\My Files\MyDetailPageCustomWebApplet.xml
- *<Field Management XML>* is the fully qualified path name of the field management XML file, for example, C:\Oracle Migration Tool on Demand\repository\FieldManagement\MyFieldManagement.xml
- *<HomepageCustomWebApplet XML>* is the fully qualified path name of the Homepage customized Web applet XML file, for example, C:\My Files\MyHomePageCustomWebApplet.xml
- *<Homepagelayout XML>* is the fully qualified path name of the homepage layout XML file, for example, C:\My Files\My HomepageLayout.xml
- *<HomeTabCustomWebApplet XML>* is the fully qualified path name of the Homepage tab customized Web applet XML file, for example, C:\My Files\MyHomeTabCustomWebApplet.xml
- *<Page Layout Field XML>* is the fully qualified path name of the page layout field information XML file for a specific object such as Account, for example, C:\My Files\PageLayoutFieldInformation\Account.xml
- *<Page Layout Related XML>* is the fully qualified path name of the page layout related information XML file for a specific object such as Account, for example, C:\My Files\PageLayoutRelatedInformation\Account.xml

- *<Page Layout Section XML>* is the fully qualified path name of the page layout section XML file for a specific object such as Account, for example, C:\My Files\PageLayoutSection\Account.xml
- *<Picklist XML>* is the fully qualified path name of the picklist XML file, for example, C:\Oracle Migration Tool On Demand\repository\Picklist\MyPicklist.xml
- *<RelatedInfoLayout XML>* is the fully qualified path name of the related information layout XML file, for example, C:\My Files\MyRelatedInfoLayout.xml
- *<Role XML>* is the fully qualified path name of the role XML file, for example, C:\My Files\MyRole.xml
- *<SalesAssessmentScript XML>* is the fully qualified path name of the sales assessment template XML file, for example, C:\My Files\MyAssessmentScript.xml
- *<WorkflowActionSet XML>* is the fully qualified path name of the workflow action set XML file, for example, C:\My Files\MyWorkflowActionSet.xml
- *<WorkflowRules XML>* is the fully qualified path name of the workflow rules XML file, for example, C:\My Files\MyWorkflowRules.xml

NOTE: The Upsert command must be run for each XML file that is retrieved from the source environment. For example, if ten access profile XML files are retrieved from the source environment, then ten upsert operations (one for each XML file) are required.

Replicating Selective Configuration Data from a Source Environment to a Target Environment

This topic describes the Oracle Migration Tool On Demand client commands that you run to replicate a subset of the configuration data from a source environment to a target environment of Oracle CRM On Demand.

CAUTION: Most components of Oracle CRM On Demand cannot revert to their original states by using the backup copies of the configuration data. For example, after a new access profile is inserted into the target environment, it cannot be removed by using the backup copy (that is, access profiles in Oracle CRM On Demand cannot be deleted). A backup copy of the configuration data provides a reference of the target environment before applying new configuration data.

NOTE: The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

To replicate selective configuration data from a source environment to a target environment

- 1 Open a command line window on the computer where you have installed Oracle Migration Tool On Demand client, and navigate to the directory where you have installed it, (for example, C:\Oracle Migration Tool On Demand).

- 2 Back up the configuration data that you want to change or update on the target environment by running the following command:

```
migrationtool -u <userID> -s <target server> ReadAll <type>
```

where:

- **<userID>** is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- **<target server>** is the URL for the Oracle CRM On Demand target server for the target environment.
- **<type>** is the type of configuration data to be extracted from the target environment. It can be one of the following values:
 - ❑ **AccessProfile.** For Oracle CRM On Demand access profile configuration data.
 - ❑ **ActionBarCustomWebApplet.** For Oracle CRM On Demand Action bar Web applet configuration data.
 - ❑ **ActionBarLayout.** For Oracle CRM On Demand Action bar layout configuration data.
 - ❑ **CascadingPicklist.** For Oracle CRM On Demand cascading picklist configuration data.
 - ❑ **CustomRecordType.** For Oracle CRM On Demand record type configuration data.
 - ❑ **CustomWebLink.** For Oracle CRM On Demand customized Web link field configuration data.
 - ❑ **CustomWebTab.** For Oracle CRM On Demand Web tab configuration data.
 - ❑ **DetailPageCustomWebApplet.** For Oracle CRM On Demand Detail page Web applet configuration data.
 - ❑ **FieldManagement.** For Oracle CRM On Demand field configuration data.
 - ❑ **HomePageCustomWebApplet.** For Oracle CRM On Demand Homepage Web applet configuration data.
 - ❑ **HomepageLayout.** For Oracle CRM On Demand homepage layout configuration data.
 - ❑ **HomeTabCustomWebApplet.** For Oracle CRM On Demand Homepage tab Web applet configuration data.
 - ❑ **PageLayoutField.** For Oracle CRM On Demand page layout field configuration data.
 - ❑ **PageLayoutRelatedInformation.** For Oracle CRM On Demand page layout related information configuration data.
 - ❑ **PageLayoutSection.** For Oracle CRM On Demand page layout section configuration data.
 - ❑ **Picklist.** For Oracle CRM On Demand customized picklist configuration data.
 - ❑ **RelatedInformationLayout.** For Oracle CRM On Demand related information configuration data.
 - ❑ **Role.** For Oracle CRM On Demand role configuration data.

- ❑ **SalesAssessmentTemplate.** For Oracle CRM On Demand sales assessment template configuration data.
- ❑ **WorkflowActionSet.** For Oracle CRM On Demand workflow actions configuration data.
- ❑ **WorkflowRuleSet.** For Oracle CRM On Demand workflow rules configuration data.

NOTE: You can use any third-party application of your choice to store a history of changes, for example, IBM® Rational® ClearCase®.

- 3 Retrieve the required configuration data from the source environment by running one of the following commands:

- ❑ `migratontool -u <userID> -s <source server> ReadAll <type>`
- ❑ `migratontool -u <userID> -s <source server> Read <type> <metadatafilename>`

where:

- **<userID>** is the customer administration user's sign-in ID for the Oracle CRM On Demand source environment where the extraction occurs.
- **<source server>** is the URL for the Oracle CRM On Demand source server for the source environment.
- **<type>** is the type of configuration data to be extracted from the target environment. It can be one of the following values:
 - ❑ **AccessProfile.** For Oracle CRM On Demand access profile configuration data.
 - ❑ **ActionBarCustomWebApplet.** For Oracle CRM On Demand Action bar Web applet configuration data.
 - ❑ **ActionBarLayout.** For Oracle CRM On Demand Action bar layout configuration data.
 - ❑ **CascadingPicklist.** For Oracle CRM On Demand cascading picklist configuration data.
 - ❑ **CustomRecordType.** For Oracle CRM On Demand record type configuration data.
 - ❑ **CustomWebLink.** For Oracle CRM On Demand customized Web link field configuration data.
 - ❑ **CustomWebTab.** For Oracle CRM On Demand Web tab configuration data.
 - ❑ **DetailPageCustomWebApplet.** For Oracle CRM On Demand Detail page Web applet configuration data.
 - ❑ **FieldManagement.** For Oracle CRM On Demand field configuration data.
 - ❑ **HomePageCustomWebApplet.** For Oracle CRM On Demand Homepage Web applet configuration data.
 - ❑ **HomepageLayout.** For Oracle CRM On Demand homepage layout configuration data.
 - ❑ **HomeTabCustomWebApplet.** For Oracle CRM On Demand Homepage tab Web applet configuration data.
 - ❑ **PageLayoutField.** For Oracle CRM On Demand page layout field configuration data.
 - ❑ **PageLayoutRelatedInformation.** For Oracle CRM On Demand page layout related information configuration data.

- ❑ **PageLayoutSection.** For Oracle CRM On Demand page layout section configuration data.
 - ❑ **Picklist.** For Oracle CRM On Demand customized picklist configuration data.
 - ❑ **RelatedInformationLayout.** For Oracle CRM On Demand related information configuration data.
 - ❑ **Role.** For Oracle CRM On Demand role configuration data.
 - ❑ **SalesAssessmentTemplate.** For Oracle CRM On Demand sales assessment template configuration data.
 - ❑ **WorkflowActionSet.** For Oracle CRM On Demand workflow actions configuration data.
 - ❑ **WorkflowRuleSet.** For Oracle CRM On Demand workflow rules configuration data.
- `<metadatafilename>` is the name of the configuration data XML file to be retrieved, for example, for an access profile, use:

C:\Oracle Migration Tool On Demand\resources\template\AccessProfile.xml

NOTE: Running the `ReadAll` command is a simpler way to obtain the configuration data that you require if you are planning to replicate a subset of configuration data from the source environment. For example, if you are replicating ten access profiles out of twenty, you can run one `ReadAll` command. However, performing a `Read` command is a way of retrieving the exact configuration data that you require.

- 4 Perform an upsert operation for the required XML file to the target environment by running the following commands, as applicable:

```
migrationtool -u <userID> -s <target server> Upsert AccessProfile  
<Access Profile XML>
```

```
migrationtool -u <userID> -s <target server> Upsert ActionBarCustomWebApplet  
<ActionBarCustomWebApplet XML>
```

```
migrationtool -u <userID> -s <target server> Upsert ActionBarLayout  
<ActionBar Layout XML>
```

```
migrationtool -u <userID> -s <target server> Upsert CascadingPicklist  
<CascadingPicklist XML>
```

```
migrationtool -u <userID> -s <target server> Upsert CustomRecordType  
<Custom Record Type XML>
```

```
migrationtool -u <userID> -s <target server> Upsert CustomWebTab  
<Custom Web Tab XML>
```

```
migrationtool -u <userID> -s <target server> Upsert CustomWebLink  
<Custom Web Link XML>
```

```
migrationtool -u <userID> -s <target server> Upsert DetailPageCustomWebApplet  
<DetailPageCustomWebApplet XML>
```

```
migrationtool -u <userID> -s <target server> Upsert FieldManagement  
<Field Management XML>
```


Replicating Configuration Data from a Source Environment to a Target Environment

■ Replicating Selective Configuration Data from a Source Environment to a Target

```
migrationtool -u <userID> -s <target server> Upsert HomepageCustomWebApplet  
  <HomepageCustomWebApplet XML>  
  
migrationtool -u <userID> -s <target server> Upsert HomepageLayout  
  <HomepageLayout XML>  
  
migrationtool -u <userID> -s <target server> Upsert HomeTabCustomWebApplet  
  <HomeTabCustomWebApplet XML>  
  
xmigrationtool -u <userID> -s <target server> Upsert PageLayoutField  
  <PageLayoutField XML>  
  
migrationtool -u <userID> -s <target server> Upsert PageLayoutRelatedInformation  
  <PageLayoutRelated XML>  
  
migrationtool -u <userID> -s <target server> Upsert PageLayoutSection  
  <PageLayoutSection XML>  
  
migrationtool -u <userID> -s <target server> Upsert Picklist <Picklist XML>  
  
migrationtool -u <userID> -s <target server> Upsert RelatedInformationLayout  
  <RelatedInfoLayout XML>  
  
migrationtool -u <userID> -s <target server> Upsert Role <Role XML>  
  
migrationtool -u <userID> -s <target server> Upsert SalesAssessmentTemplate  
  <SalesAssessmentScript XML>  
  
migrationtool -u <userID> -s <target server> Upsert WorkflowActionSet  
  <WorkflowActionSet XML>  
  
migrationtool -u <userID> -s <target server> Upsert WorkflowRules  
  <WorkflowRules XML>
```

where:

- <userID> is the customer administration user's sign-in ID for the Oracle CRM On Demand environment where the upsert operation occurs.
- <target server> is the URL for the Oracle CRM On Demand target server for the target environment.
- <Access Profile XML> is the fully qualified path name of the access profile XML file, for example, C:\Oracle Migration Tool on Demand\repository\AccessProfile\MyCustomProfile.xml
- <ActionBarCustomWebApplet XML> is the fully qualified path name of the Action bar customized Web applet XML file, for example, C:\My Files\MyActionBarCustomWebApplet.xml
- <Action Bar Layout XML> is the fully qualified path name of the Action Bar layout XML file, for example, C:\My Files\MyActionBarLayout.xml
- <CascadingPicklist XML> is the fully qualified path name of the cascading picklist XML file, for example, C:\My Files\MyCascadingPicklist.xml

- *<Custom Record Type XML>* is the fully qualified path name of the custom record type XML file, for example, C:\Oracle Migration Tool On Demand\repository\CustomRecordType\MyCustomRecordType.xml
- *<Custom Web Link XML>* is the fully qualified path name of the custom Web link XML file, for example, C:\My Files\MyCustomWebLink.xml
- *<Custom Web Tab XML>* is the fully qualified path name of the custom Web tab XML file, for example, C:\Oracle Migration Tool On Demand\repository\CustomWebTab\MyCustomWebTab.xml
- *<DetailPageCustomWebApplet XML>* is the fully qualified path name of the Detail page customized Web applet XML file, for example, C:\My Files\MyDetailPageCustomWebApplet.xml
- *<Field Management XML>* is the fully qualified path name of the field management XML file, for example, C:\Oracle Migration Tool On Demand\repository\FieldManagement\MyFieldManagement.xml
- *<HomepageCustomWebApplet XML>* is the fully qualified path name of the Homepage customized Web applet XML file, for example, C:\My Files\MyHomePageCustomWebApplet.xml
- *<Homepagelayout XML>* is the fully qualified path name of the homepage layout XML file, for example, C:\My Files\My Homelayout.xml
- *<HomeTabCustomWebApplet XML>* is the fully qualified path name of the Homepage tab customized Web applet XML file, for example, C:\My Files\MyHomeTabCustomWebApplet.xml
- *<Page Layout Field XML>* is the fully qualified path name of the page layout field information XML file for a specific object such as Account, for example, C:\My Files\PageLayoutFieldInformation\Account.xml
- *<Page Layout Related XML>* is the fully qualified path name of the page layout related information XML file for a specific object such as Account, for example, C:\My Files\PageLayoutRelatedInformation\Account.xml
- *<Page Layout Section XML>* is the fully qualified path name of the page layout section XML file for a specific object such as Account, for example, C:\My Files\PageLayoutSection\Account.xml
- *<Picklist XML>* is the fully qualified path name of the picklist XML file, for example, C:\Oracle Migration Tool On Demand\repository\Picklist\MyPicklist.xml
- *<RelatedInfoLayout XML>* is the fully qualified path name of the related information layout XML file, for example, C:\My Files\MyRelatedInfoLayout.xml
- *<Role XML>* is the fully qualified path name of the role XML file, for example, C:\My Files\MyRole.xml
- *<SalesAssessmentScript XML>* is the fully qualified path name of the sales assessment template XML file, for example, C:\My Files\MyAssessmentScript.xml
- *<WorkflowActionSet XML>* is the fully qualified path name of the workflow action set XML file, for example, C:\My Files\My WorkflowActionSet.xml

Replicating Configuration Data from a Source Environment to a Target Environment

■ Replicating Selective Configuration Data from a Source Environment to a Target

- *<WorkflowRules XML>* is the fully qualified path name of the workflow rules XML file, for example, C:\My Files\My WorkFlowRules.xml

NOTE: The Upsert command must be run for each XML file that is retrieved from the source environment. For example, if ten access profile XML files are retrieved from the source, then ten upsert operations (one for each XML file) are required.

Reference Information for Oracle Migration Tool On Demand

This appendix contains reference information that is required when using the Oracle Migration Tool On Demand client. It includes the following topics:

- [Language Codes and Their Corresponding Language and Country on page 163](#)
- [Display Names and Their Corresponding Names in the Access Profile XML File on page 164](#)
- [Access Levels and Their Corresponding Permission Codes in the XML File on page 188](#)
- [Icons for Custom Record Types on page 189](#)
- [System Names for Record Types on page 201](#)
- [Homepage Layout Mapping on page 209](#)
- [Privilege IDs and Their Corresponding Names and Descriptions on page 222](#)
- [Child Applet IDs and Their Corresponding Names on page 230](#)

Language Codes and Their Corresponding Language and Country

Table 58 lists the three-letter language codes in Oracle CRM On Demand and their corresponding languages.

Table 58. Three-Letter Language Codes and Their Corresponding Language and Country

Three-Letter Language Code	Language and country	Language Code	Language	Country
DEU	de_DE	de	German	Germany
ENG	en_GB	en	English	United Kingdom
ENU	en_US	en	English	United States
ESN	es_ES	es	Spanish	Spain
FRA	fr_FR	fr	French	France
ITA	it_IT	it	Italian	Italy
JPN	ja_JP	ja	Japanese	Japan
KOR	ko_KR	ko	Korean	Korea
PTG	pt_PT	pt	Portuguese	Portugal
THA	th_TH	th	Thai	Thailand

Table 58. Three-Letter Language Codes and Their Corresponding Language and Country

Three-Letter Language Code	Language and country	Language Code	Language	Country
CHS	zh_CN	zh	Chinese (Simplified)	China
CHT	zh_TW	zh	Chinese (Traditional)	Taiwan
NLD	nl_NL	nl	Dutch	Netherlands
DAN	da_DK	da	Danish	Denmark
FIN	fi_FI	fi	Finnish	Finland
PLK	pl_PL	pl	Polish	Poland
RUS	ru_RU	ru	Russian	Russia
SVE	sv_SE	sv	Swedish	Sweden
PTB	pt_BR	pt	Portuguese	Brazil
NOR	no_NO	no	Norwegian	Norway

Display Names and Their Corresponding Names in the Access Profile XML File

This topic describes the Oracle CRM On Demand object display names in the access profile XML file and their corresponding display names in the user interface for Oracle CRM On Demand.

How to Read the Table

Table 59 contains the access object names that appear in the access profile XML file and the associated display name in the Oracle CRM On Demand user interface.

In Table 59, the names without a parent name (indicated by *Not Applicable* in the table) reference the top-level object. For example, in the following table, the table entry refers to the top-level object, Account. This object name is referenced as *Account* in the access profile XML file.

Object Name in the Access Profile XML File	Parent Name	Display Name in the User Interface
Account	Not applicable	Account

In Table 59, the object names with a parent name reference the related information object for the object listed in the Parent Name column. For example, in the following table, the table entry refers to the Related Information object called *Addresses* for the Account Object. This is referenced as *Acct Address* in the access profile XML file:

Object Name in the Access Profile XML File	Parent Name	Display Name in the User Interface
Acct Address	Account	Addresses

Object Names and Their Corresponding Display Names in the User Interface

Table 59 lists the object names that appear in the XML file that you are working with and their corresponding display names in the user interface for Oracle CRM On Demand. The following abbreviations are used in the table:

- 1-M (one-to-many)
- 1-M-Primary (one-to-many-primary)
- M-M (many-to-many)
- M-M-Primary (many-to-many-primary)

NOTE: Objects listed in Table 59 with parentheses appear with a space after the opening parenthesis, and before the closing parenthesis in the XML file. For example, Account CustomObject4 (Account Id) appears as Account CustomObject4 (Account Id) in the XML file.

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject10	Not applicable	Custom Object 10	Top
CustomObject10 Lead (CustomObject10 Id)	CustomObject10	Leads	1-M
CustomObject10 Service Request (CustomObject10 Id)	CustomObject10	Service Requests	1-M
CustomObject10/Audit Trail Item 2	CustomObject10	Audit Trail	ReadOnly
CustomObject10 Account (CustomObject10 Id)	CustomObject10	Account Plural Name ENU	1-M
CustomObject10 CustomObject6 (CustomObject10 Id)	CustomObject10	Custom Objects 06	1-M-PRIMARY
CustomObject10 Contact (CustomObject10 Id)	CustomObject10	Contacts	1-M
CustomObject10 CustomObject10 (CustomObject10 Id)	CustomObject10	Custom Objects 10	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject10 Revenue (CustomObject10 Id)	CustomObject10	Revenues	Child
CustomObject10 Campaign (CustomObject10 Id)	CustomObject10	Campaigns	1-M
CustomObject10 CustomObject4 (CustomObject10 Id)	CustomObject10	Custom Objects 04	1-M-PRIMARY
CustomObject10 Product (CustomObject10 Id)	CustomObject10	Products	Child
CustomObject10 CustomObject7 (CustomObject10 Id)	CustomObject10	Custom Objects 07	1-M-PRIMARY
CustomObject10 Custom Object 2 (CustomObject10 Id)	CustomObject10	Custom Objects 02	1-M-PRIMARY
CustomObject10 Activity (CustomObject10 Id)	CustomObject10	Activities	1-M-PRIMARY
CustomObject10/CustomObject10Team	CustomObject10	Custom Object 10 Teams	Child
CustomObject10 Custom Object 1 (CustomObject10 Id)	CustomObject10	Custom Objects 01	1-M-PRIMARY
CustomObject10 CustomObject9 (CustomObject10 Id)	CustomObject10	Custom Objects 09	1-M-PRIMARY
CustomObject10 Solution (CustomObject10 Id)	CustomObject10	Solutions	1-M
CustomObject10 Asset (CustomObject10 Id)	CustomObject10	Assets	1-M
CustomObject10 Opportunity (CustomObject10 Id)	CustomObject10	Opportunities	1-M-PRIMARY
CustomObject10 CustomObject8 (CustomObject10 Id)	CustomObject10	Custom Objects 08	1-M-PRIMARY
CustomObject10 CustomObject5 (CustomObject10 Id)	CustomObject10	Custom Objects 05	1-M-PRIMARY
CustomObject10 Custom Object 3 (CustomObject10 Id)	CustomObject10	Custom Objects 03	1-M-PRIMARY
CustomObject7	Not applicable	Custom Object 07	Top
CustomObject7 CustomObject5 (CustomObject7 Id)	CustomObject7	Custom Objects 05	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject7 Custom Object 2 (CustomObject7 Id)	CustomObject7	Custom Objects 02	1-M-PRIMARY
CustomObject7 Activity (CustomObject7 Id)	CustomObject7	Activities	1-M-PRIMARY
CustomObject7 Campaign (CustomObject7 Id)	CustomObject7	Campaigns	1-M
CustomObject7 Product (CustomObject7 Id)	CustomObject7	Products	Child
CustomObject7 Opportunity (CustomObject7 Id)	CustomObject7	Opportunities	1-M-PRIMARY
CustomObject7 CustomObject8 (CustomObject7 Id)	CustomObject7	Custom Objects 08	1-M-PRIMARY
CustomObject7/CustomObject7Team	CustomObject7	Custom Object 07 Teams	Child
CustomObject7 Custom Object 1 (CustomObject7 Id)	CustomObject7	Custom Objects 01	1-M-PRIMARY
CustomObject7 CustomObject4 (CustomObject7 Id)	CustomObject7	Custom Objects 04	1-M-PRIMARY
CustomObject7/Audit Trail Item 2	CustomObject7	Audit Trail	ReadOnly
CustomObject7 Account (CustomObject7 Id)	CustomObject7	Account Plural Name ENU	1-M
CustomObject7 CustomObject10 (CustomObject7 Id)	CustomObject7	Custom Objects 10	1-M-PRIMARY
CustomObject7 CustomObject9 (CustomObject7 Id)	CustomObject7	Custom Objects 09	1-M-PRIMARY
CustomObject7 Service Request (CustomObject7 Id)	CustomObject7	Service Requests	1-M
CustomObject7 Contact (CustomObject7 Id)	CustomObject7	Contacts	1-M
CustomObject7 CustomObject6 (CustomObject7 Id)	CustomObject7	Custom Objects 06	1-M-PRIMARY
CustomObject7 Revenue (CustomObject7 Id)	CustomObject7	Revenues	Child
CustomObject7 CustomObject7 (CustomObject7 Id)	CustomObject7	Custom Objects 07	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject7 Asset (CustomObject7 Id)	CustomObject7	Assets	1-M
CustomObject7 Custom Object 3 (CustomObject7 Id)	CustomObject7	Custom Objects 03	1-M-PRIMARY
CustomObject7 Solution (CustomObject7 Id)	CustomObject7	Solutions	1-M
CustomObject7 Lead (CustomObject7 Id)	CustomObject7	Leads	1-M
Campaign	Not applicable	Campaign	Top
Camp CustObj3	Campaign	Custom Objects 03	M-M
Camp Cmpltd Activity	Campaign	Completed Activities	1-M-PRIMARY
Camp CustObj1	Campaign	Custom Objects 01	M-M
Camp Lead	Campaign	Leads	1-M
Camp Contact	Campaign	Contacts	1-M
Campaign CustomObject6 (Campaign Id)	Campaign	Custom Objects 06	1-M-PRIMARY
Camp Att	Campaign	Attachments	Child
Camp Open Activity	Campaign	Open Activities	1-M-PRIMARY
Campaign CustomObject5 (Campaign Id)	Campaign	Custom Objects 05	1-M-PRIMARY
Camp Note	Campaign	Notes	Child
Campaign CustomObject4 (Campaign Id)	Campaign	Custom Objects 04	1-M-PRIMARY
Campaign CustomObject8 (Campaign Id)	Campaign	Custom Objects 08	1-M-PRIMARY
Campaign CustomObject10 (Campaign Id)	Campaign	Custom Objects 10	1-M-PRIMARY
Camp CustObj2	Campaign	Custom Objects 02	M-M
Camp Oppty	Campaign	Opportunities	M-M-PRIMARY
Campaign CustomObject7 (Campaign Id)	Campaign	Custom Objects 07	1-M-PRIMARY
Campaign CustomObject9 (Campaign Id)	Campaign	Custom Objects 09	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CRMODLS_BPL_ACNT	Not applicable	Plan Account	Top
CustomObject4	Not applicable	Custom Object 04	Top
CustomObject4 Custom Object 3 (CustomObject4 Id)	CustomObject4	Custom Objects 03	1-M-PRIMARY
CustomObject4/Audit Trail Item 2	CustomObject4	Audit Trail	ReadOnly
CustomObject4 Opportunity (CustomObject4 Id)	CustomObject4	Opportunities	1-M-PRIMARY
CustomObject4 Service Request (CustomObject4 Id)	CustomObject4	Service Requests	1-M
CustomObject4 CustomObject5 (CustomObject4 Id)	CustomObject4	Custom Objects 05	1-M-PRIMARY
CustomObject4 Contact (CustomObject4 Id)	CustomObject4	Contacts	1-M
CustomObject4 Solution (CustomObject4 Id)	CustomObject4	Solutions	1-M
CustomObject4 CustomObject8 (CustomObject4 Id)	CustomObject4	Custom Objects 08	1-M-PRIMARY
CustomObject4 CustomObject4 (CustomObject4 Id)	CustomObject4	Custom Objects 04	1-M-PRIMARY
CustomObject4 CustomObject6 (CustomObject4 Id)	CustomObject4	Custom Objects 06	1-M-PRIMARY
CustomObject4 Custom Object 1 (CustomObject4 Id)	CustomObject4	Custom Objects 01	1-M-PRIMARY
CustomObject4 Asset (CustomObject4 Id)	CustomObject4	Assets	1-M
CustomObject4 Lead (CustomObject4 Id)	CustomObject4	Leads	1-M
CustomObject4 Product (CustomObject4 Id)	CustomObject4	Products	Child
CustomObject4 CustomObject10 (CustomObject4 Id)	CustomObject4	Custom Objects 10	1-M-PRIMARY
CustomObject4/CustomObject4Team	CustomObject4	Custom Object 04 Teams	Child
CustomObject4 CustomObject7 (CustomObject4 Id)	CustomObject4	Custom Objects 07	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject4 Custom Object 2 (CustomObject4 Id)	CustomObject4	Custom Objects 02	1-M-PRIMARY
CustomObject4 Activity (CustomObject4 Id)	CustomObject4	Activities	1-M-PRIMARY
CustomObject4 Revenue (CustomObject4 Id)	CustomObject4	Revenues	Child
CustomObject4 Campaign (CustomObject4 Id)	CustomObject4	Campaigns	1-M
CustomObject4 Account (CustomObject4 Id)	CustomObject4	Account Plural Name ENU	1-M
CustomObject4 CustomObject9 (CustomObject4 Id)	CustomObject4	Custom Objects 09	1-M-PRIMARY
CRMOD_LS_Period	Not applicable	Period	Top
CRMOD_LS_Period CRMODLS_BusinessPlan (Period Id)	CRMOD_LS_Period	Business Plans	1-M-PRIMARY
CRMOD_LS_Period CRMODLS_OBJECTIVE (Period Id)	CRMOD_LS_Period	Objectives	1-M-PRIMARY
Solution	Not applicable	Solution	Top
Soln SR	Solution	Service Requests	M-M
Soln Att	Solution	Attachments	Child
Soln CustObj3	Solution	Custom Objects 03	M-M
Solution CustomObject8 (Solution Id)	Solution	Custom Objects 08	1-M-PRIMARY
Soln Product	Solution	Solution Product	1-M
Solution CustomObject4 (Solution Id)	Solution	Custom Objects 04	1-M-PRIMARY
Soln CustObj1	Solution	Custom Objects 01	M-M
Solution CustomObject10 (Solution Id)	Solution	Custom Objects 10	1-M-PRIMARY
Soln CustObj2	Solution	Custom Objects 02	M-M
Solution CustomObject7 (Solution Id)	Solution	Custom Objects 07	1-M-PRIMARY
Solution CustomObject5 (Solution Id)	Solution	Custom Objects 05	1-M-PRIMARY
Solution CustomObject6 (Solution Id)	Solution	Custom Objects 06	1-M-PRIMARY
Solution CustomObject9 (Solution Id)	Solution	Custom Objects 09	1-M-PRIMARY
Soln Related Soln	Solution	Related Solutions	M-M

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject8	Not applicable	Custom Object 08	Top
CustomObject8 Lead (CustomObject8 Id)	CustomObject8	Leads	1-M
CustomObject8 Activity (CustomObject8 Id)	CustomObject8	Activities	1-M-PRIMARY
CustomObject8 Service Request (CustomObject8 Id)	CustomObject8	Service Requests	1-M
CustomObject8 Contact (CustomObject8 Id)	CustomObject8	Contacts	1-M
CustomObject8 CustomObject6 (CustomObject8 Id)	CustomObject8	Custom Objects 06	1-M-PRIMARY
CustomObject8 CustomObject8 (CustomObject8 Id)	CustomObject8	Custom Objects 08	1-M-PRIMARY
CustomObject8 Custom Object 3 (CustomObject8 Id)	CustomObject8	Custom Objects 03	1-M-PRIMARY
CustomObject8 CustomObject4 (CustomObject8 Id)	CustomObject8	Custom Objects 04	1-M-PRIMARY
CustomObject8 Custom Object 1 (CustomObject8 Id)	CustomObject8	Custom Objects 01	1-M-PRIMARY
CustomObject8 Revenue (CustomObject8 Id)	CustomObject8	Revenues	Child
CustomObject8 Asset (CustomObject8 Id)	CustomObject8	Assets	1-M
CustomObject8 Opportunity (CustomObject8 Id)	CustomObject8	Opportunities	1-M-PRIMARY
CustomObject8 CustomObject7 (CustomObject8 Id)	CustomObject8	Custom Objects 07	1-M-PRIMARY
CustomObject8 Custom Object 2 (CustomObject8 Id)	CustomObject8	Custom Objects 02	1-M-PRIMARY
CustomObject8 Product (CustomObject8 Id)	CustomObject8	Products	Child
CustomObject8 Account (CustomObject8 Id)	CustomObject8	Account Plural Name ENU	1-M
CustomObject8 Campaign (CustomObject8 Id)	CustomObject8	Campaigns	1-M

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject8 CustomObject9 (CustomObject8 Id)	CustomObject8	Custom Objects 09	1-M-PRIMARY
CustomObject8 CustomObject5 (CustomObject8 Id)	CustomObject8	Custom Objects 05	1-M-PRIMARY
CustomObject8 CustomObject10 (CustomObject8 Id)	CustomObject8	Custom Objects 10	1-M-PRIMARY
CustomObject8/Audit Trail Item 2	CustomObject8	Audit Trail	ReadOnly
CustomObject8 Solution (CustomObject8 Id)	CustomObject8	Solutions	1-M
CustomObject8/CustomObject8Team	CustomObject8	Custom Object 08 Teams	Child
CustObj2	Not applicable	Custom Object 02	Top
OnDemand Custom Object 2/Audit Trail Item 2	CustObj2	Audit Trail	ReadOnly
CustObj2 CustObj2	CustObj2	Custom Objects 02	M-M
CustObj2 Open Activity	CustObj2	Open Activities	M-M-PRIMARY
CustObj2 Contact	CustObj2	Contacts	M-M
CustObj2 Cmpltd Activity	CustObj2	Completed Activities	M-M-PRIMARY
Custom Object 2 CustomObject5 (Custom Object 2 Id)	CustObj2	Custom Objects 05	1-M-PRIMARY
Custom Object 2 CustomObject6 (Custom Object 2 Id)	CustObj2	Custom Objects 06	1-M-PRIMARY
CustObj2 Team	CustObj2	Custom Objects 02 Team	Child
Custom Object 2 CustomObject8 (Custom Object 2 Id)	CustObj2	Custom Objects 08	1-M-PRIMARY
Custom Object 2 CustomObject10 (Custom Object 2 Id)	CustObj2	Custom Objects 10	1-M-PRIMARY
CustObj2 Prod	CustObj2	Products	M-M
CustObj2 Service Request	CustObj2	Service Requests	M-M
CustObj2 Note	CustObj2	Notes	Child
CustObj2 Camp	CustObj2	Campaigns	M-M

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
Custom Object 2 CustomObject7 (Custom Object 2 Id)	CustObj2	Custom Objects 07	1-M-PRIMARY
CustObj2 CustObj3	CustObj2	Custom Objects 03	M-M
Custom Object 2 CustomObject4 (Custom Object 2 Id)	CustObj2	Custom Objects 04	1-M-PRIMARY
Custom Object 2 CustomObject9 (Custom Object 2 Id)	CustObj2	Custom Objects 09	1-M-PRIMARY
CustObj2 Acct	CustObj2	Account Plural Name ENU	M-M
CustObj2 Solution	CustObj2	Solutions	M-M
CustObj2 Lead	CustObj2	Leads	M-M
CustObj2 Att	CustObj2	Attachments	Child
CustObj2 Opportunity	CustObj2	Opportunities	M-M-PRIMARY
CustObj2 CustObj1	CustObj2	Custom Objects 01	M-M
CustObj2 Asset	CustObj2	Assets	M-M
CRMODLS_PlanOpportunities	Not applicable	Plan Opportunity	Top
CustomObject9	Not applicable	Custom Object 09	Top
CustomObject9 Service Request (CustomObject9 Id)	CustomObject9	Service Requests	1-M
CustomObject9/CustomObject9Team	CustomObject9	Custom Object 09 Teams	Child
CustomObject9 Campaign (CustomObject9 Id)	CustomObject9	Campaigns	1-M
CustomObject9 CustomObject8 (CustomObject9 Id)	CustomObject9	Custom Objects 08	1-M-PRIMARY
CustomObject9 Revenue (CustomObject9 Id)	CustomObject9	Revenues	Child
CustomObject9 Custom Object 2 (CustomObject9 Id)	CustomObject9	Custom Objects 02	1-M-PRIMARY
CustomObject9 Custom Object 3 (CustomObject9 Id)	CustomObject9	Custom Objects 03	1-M-PRIMARY
CustomObject9 CustomObject6 (CustomObject9 Id)	CustomObject9	Custom Objects 06	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject9 Lead (CustomObject9 Id)	CustomObject9	Leads	1-M
CustomObject9 CustomObject7 (CustomObject9 Id)	CustomObject9	Custom Objects 07	1-M-PRIMARY
CustomObject9 Product (CustomObject9 Id)	CustomObject9	Products	Child
CustomObject9 Asset (CustomObject9 Id)	CustomObject9	Assets	1-M
CustomObject9 CustomObject5 (CustomObject9 Id)	CustomObject9	Custom Objects 05	1-M-PRIMARY
CustomObject9 Activity (CustomObject9 Id)	CustomObject9	Activities	1-M-PRIMARY
CustomObject9 CustomObject4 (CustomObject9 Id)	CustomObject9	Custom Objects 04	1-M-PRIMARY
CustomObject9 Account (CustomObject9 Id)	CustomObject9	Account Plural Name ENU	1-M
CustomObject9/Audit Trail Item 2	CustomObject9	Audit Trail	ReadOnly
CustomObject9 Contact (CustomObject9 Id)	CustomObject9	Contacts	1-M
CustomObject9 CustomObject10 (CustomObject9 Id)	CustomObject9	Custom Objects 10	1-M-PRIMARY
CustomObject9 Solution (CustomObject9 Id)	CustomObject9	Solutions	1-M
CustomObject9 Opportunity (CustomObject9 Id)	CustomObject9	Opportunities	1-M-PRIMARY
CustomObject9 CustomObject9 (CustomObject9 Id)	CustomObject9	Custom Objects 09	1-M-PRIMARY
CustomObject9 Custom Object 1 (CustomObject9 Id)	CustomObject9	Custom Objects 01	1-M-PRIMARY
Asset	Not applicable	Asset	Top
Opportunity	Not applicable	Opportunity	Top
Oppty Note	Opportunity	Notes	Child
Opportunity CustomObject10 (Opportunity Id)	Opportunity	Custom Objects 10	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
Opportunity CustomObject5 (Opportunity Id)	Opportunity	Custom Objects 05	1-M-PRIMARY
Opportunity CustomObject7 (Opportunity Id)	Opportunity	Custom Objects 07	1-M-PRIMARY
Oppty Open Activity	Opportunity	Open Activities	1-M-PRIMARY
Oppty Cmpltd Activity	Opportunity	Completed Activities	1-M-PRIMARY
Oppty Competitor	Opportunity	Opportunity Competitors	Child
Opportunity CRMODLS_PlanOpportunities (Opportunity Id)	Opportunity	Plan Opportunities	1-M-PRIMARY
Oppty Revenue	Opportunity	Revenues	Child
Oppty Lead	Opportunity	Leads	1-M
Opportunity CustomObject9 (Opportunity Id)	Opportunity	Custom Objects 09	1-M-PRIMARY
Oppty CustObj3	Opportunity	Custom Objects 03	M-M
Oppty Partner	Opportunity	Opportunity Partners	Child
Opportunity Opportunity (Parent oppty Id)	Opportunity	Sub-Opportunities	1-M-PRIMARY
Opportunity CustomObject8 (Opportunity Id)	Opportunity	Custom Objects 08	1-M-PRIMARY
Oppty Att	Opportunity	Attachments	Child
Oppty Team	Opportunity	Opportunity Team	Child
Opportunity CustomObject6 (Opportunity Id)	Opportunity	Custom Objects 06	1-M-PRIMARY
Oppty Contact	Opportunity	Contacts	Child
Oppty CustObj1	Opportunity	Custom Objects 01	M-M
Oppty CustObj2	Opportunity	Custom Objects 02	M-M
Oppty Audit Trail	Opportunity	Audit Trail	ReadOnly
Opportunity CustomObject4 (Opportunity Id)	Opportunity	Custom Objects 04	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
Oppty Sales Assmt	Opportunity	Opportunity Assessment	1-M
Activity	Not applicable	Activity	Top
Activity CustomObject9 (Activity Id)	Activity	Custom Objects 09	1-M-PRIMARY
Activity CustObj1	Activity	Custom Objects 01	M-M
Activity CustomObject5 (Activity Id)	Activity	Custom Objects 05	1-M-PRIMARY
Activity CustomObject7 (Activity Id)	Activity	Custom Objects 07	1-M-PRIMARY
Activity Contact	Activity	Not applicable	M-M
Activity Att	Activity	Attachments	Child
Activity Soln	Activity	Solutions	M-M
Activity CustomObject8 (Activity Id)	Activity	Custom Objects 08	1-M-PRIMARY
Activity Sales Assmt	Activity	Activity Assessment	1-M
Activity CustObj2	Activity	Custom Objects 02	M-M
Activity CustomObject10 (Activity Id)	Activity	Custom Objects 10	1-M-PRIMARY
Activity Team	Activity	Users	M-M
Activity CustomObject4 (Activity Id)	Activity	Custom Objects 04	1-M-PRIMARY
Action/Audit Trail Item 2	Activity	Audit Trail	ReadOnly
Activity CustObj3	Activity	Custom Objects 03	M-M
Activity CustomObject6 (Activity Id)	Activity	Custom Objects 06	1-M-PRIMARY
CRMODLS_BPL_CNTCT	Not applicable	Plan Contact	Top
Forecast	Not applicable	Forecast	Top
CustomObject5	Not applicable	Custom Object 05	Top
CustomObject5 Solution (CustomObject5 Id)	CustomObject5	Solutions	1-M
CustomObject5 CustomObject4 (CustomObject5 Id)	CustomObject5	Custom Objects 04	1-M-PRIMARY
CustomObject5 Custom Object 1 (CustomObject5 Id)	CustomObject5	Custom Objects 01	1-M-PRIMARY
CustomObject5 Activity (CustomObject5 Id)	CustomObject5	Activities	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject5 CustomObject6 (CustomObject5 Id)	CustomObject5	Custom Objects 06	1-M-PRIMARY
CustomObject5 CustomObject8 (CustomObject5 Id)	CustomObject5	Custom Objects 08	1-M-PRIMARY
CustomObject5 Custom Object 2 (CustomObject5 Id)	CustomObject5	Custom Objects 02	1-M-PRIMARY
CustomObject5/CustomObject5Team	CustomObject5	Custom Object 05 Teams	Child
CustomObject5 Asset (CustomObject5 Id)	CustomObject5	Assets	1-M
CustomObject5 Account (CustomObject5 Id)	CustomObject5	Account Plural Name ENU	1-M
CustomObject5 Lead (CustomObject5 Id)	CustomObject5	Leads	1-M
CustomObject5 CustomObject7 (CustomObject5 Id)	CustomObject5	Custom Objects 07	1-M-PRIMARY
CustomObject5/Audit Trail Item 2	CustomObject5	Audit Trail	ReadOnly
CustomObject5 Opportunity (CustomObject5 Id)	CustomObject5	Opportunities	1-M-PRIMARY
CustomObject5 CustomObject5 (CustomObject5 Id)	CustomObject5	Custom Objects 05	1-M-PRIMARY
CustomObject5 Custom Object 3 (CustomObject5 Id)	CustomObject5	Custom Objects 03	1-M-PRIMARY
CustomObject5 Product (CustomObject5 Id)	CustomObject5	Products	Child
CustomObject5 CustomObject10 (CustomObject5 Id)	CustomObject5	Custom Objects 10	1-M-PRIMARY
CustomObject5 Revenue (CustomObject5 Id)	CustomObject5	Revenues	Child
CustomObject5 Service Request (CustomObject5 Id)	CustomObject5	Service Requests	1-M
CustomObject5 Contact (CustomObject5 Id)	CustomObject5	Contacts	1-M
CustomObject5 Campaign (CustomObject5 Id)	CustomObject5	Campaigns	1-M

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject5 CustomObject9 (CustomObject5 Id)	CustomObject5	Custom Objects 09	1-M-PRIMARY
CRMODLS_BusinessPlan_ATTACHMENT	Not applicable	Business Plan Attachment	Top
CustObj3	Not applicable	Custom Object 03	Top
Custom Object 3 CustomObject8 (Custom Object 3 Id)	CustObj3	Custom Objects 08	1-M-PRIMARY
CustObj3 Team	CustObj3	Custom Objects 03 Team	Child
CustObj3 Solution	CustObj3	Solutions	M-M
Custom Object 3 CustomObject4 (Custom Object 3 Id)	CustObj3	Custom Objects 04	1-M-PRIMARY
CustObj3 Open Activity	CustObj3	Open Activities	M-M-PRIMARY
CustObj3 Service Request	CustObj3	Service Requests	M-M
CustObj3 Att	CustObj3	Attachments	Child
Custom Object 3 CustomObject5 (Custom Object 3 Id)	CustObj3	Custom Objects 05	1-M-PRIMARY
Custom Object 3 CustomObject6 (Custom Object 3 Id)	CustObj3	Custom Objects 06	1-M-PRIMARY
CustObj3 CustObj3	CustObj3	Custom Objects 03	M-M
CustObj3 Note	CustObj3	Notes	Child
Custom Object 3 CustomObject7 (Custom Object 3 Id)	CustObj3	Custom Objects 07	1-M-PRIMARY
CustObj3 Opportunity	CustObj3	Opportunities	M-M-PRIMARY
CustObj3 CustObj2	CustObj3	Custom Objects 02	M-M
CustObj3 Contact	CustObj3	Contacts	M-M
CustObj3 Camp	CustObj3	Campaigns	M-M
CustObj3 Acct	CustObj3	Account Plural Name ENU	M-M
CustObj3 Prod	CustObj3	Products	M-M
CustObj3 Cmpltd Activity	CustObj3	Completed Activities	M-M-PRIMARY
Custom Object 3 CustomObject10 (Custom Object 3 Id)	CustObj3	Custom Objects 10	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustObj3 CustObj1	CustObj3	Custom Objects 01	M-M
OnDemand Custom Object 3/Audit Trail Item 2	CustObj3	Audit Trail	ReadOnly
CustObj3 Lead	CustObj3	Leads	M-M
Custom Object 3 CustomObject9 (Custom Object 3 Id)	CustObj3	Custom Objects 09	1-M-PRIMARY
CustObj3 Asset	CustObj3	Assets	M-M
CRMODLS_OBJECTIVE_ATTACHMENT	Not applicable	Objective Attachment	Top
CRMODLS_BusinessPlan	Not applicable	Business Plan	Top
CRMODLS_BusinessPlan CustomObject8 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 08	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_OBJECTIVE (Plan Name Id)	CRMODLS_Busine ssPlan	Objectives	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject7 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 07	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_BPL_CNTCT (Business Plan Id)	CRMODLS_Busine ssPlan	Plan Contacts	1-M-PRIMARY
CRMODLS_BusinessPlan Custom Object 2 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 02	1-M-PRIMARY
CRMODLS_BusinessPlan/ CRMODLS_BusinessPlanTeam	CRMODLS_Busine ssPlan	Business Plan Teams	Child
BP Sales Assmt	CRMODLS_Busine ssPlan	Assessments	1-M
CRMODLS_BusinessPlan Custom Object 1 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 01	1-M-PRIMARY
CRMODLS_BusinessPlan Custom Object 3 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 03	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_BusinessPlan (Parent Plan Name Id)	CRMODLS_Busine ssPlan	Business Plans	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_BPL_ACNT (Business Plan Id)	CRMODLS_Busine ssPlan	Plan Accounts	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CRMODLS_BusinessPlan CRMODLS_BusinessPlan_ATTACHMENT (CRMODLS_BusinessPlan Id)	CRMODLS_Busine ssPlan	Business Plan Attachments	Child
CRMODLS_BusinessPlan CustomObject6 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 06	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_PlanOpportunities (Plan Id)	CRMODLS_Busine ssPlan	Plan Opportunities	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject9 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 09	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject5 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 05	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject4 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 04	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject10 (Business Plan Id)	CRMODLS_Busine ssPlan	Custom Objects 10	1-M-PRIMARY
CRMODLS_BusinessPlan Activity (Business Plan Id)	CRMODLS_Busine ssPlan	Activities	1-M-PRIMARY
Account	Not applicable	Account Singular Name ENU	Top
Acct Sub Acct	Account	Sub-Account Plural Name ENU	ReadOnly
Acct Cmpltd Activity	Account	Completed Activities	1-M-PRIMARY
Account CustomObject4 (Account Id)	Account	Custom Objects 04	1-M-PRIMARY
Account CRMODLS_BPL_ACNT (Account ID Id)	Account	Plan Accounts	1-M-PRIMARY
Acct Sales Assmt	Account	Assessments	1-M
Acct Contact	Account	Contacts	M-M
Acct Asset	Account	Assets	1-M
Acct Address	Account	Addresses	Child
Account CustomObject5 (Account Id)	Account	Custom Objects 05	1-M-PRIMARY
Acct CustObj3	Account	Custom Objects 03	M-M
Account CustomObject7 (Account Id)	Account	Custom Objects 07	1-M-PRIMARY
Acct Att	Account	Attachments	Child

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
Acct Oppty	Account	Opportunities	1-M-PRIMARY
Account CustomObject10 (Account Id)	Account	Custom Objects 10	1-M-PRIMARY
Account/Audit Trail Item 2	Account	Audit Trail	ReadOnly
Account CRMODLS_BusinessPlan (Account ID Id)	Account	Business Plans	1-M-PRIMARY
Acct Lead	Account	Leads	1-M
Acct Team	Account	Account Singular Name ENU Team	Child
Account CustomObject8 (Account Id)	Account	Custom Objects 08	1-M-PRIMARY
Account CustomObject6 (Account Id)	Account	Custom Objects 06	1-M-PRIMARY
Acct Open Activity	Account	Open Activities	1-M-PRIMARY
Account CustomObject9 (Account Id)	Account	Custom Objects 09	1-M-PRIMARY
Account CRMODLS_OBJECTIVE (Account Name Id)	Account	Objectives	1-M-PRIMARY
Acct CustObj2	Account	Custom Objects 02	M-M
Acct SR	Account	Service Requests	1-M
Acct Note	Account	Notes	Child
Acct CustObj1	Account	Custom Objects 01	M-M
Acct Partner	Account	Account Partners	Child
Acct Competitor	Account	Account Competitors	Child
CustObj1	Not applicable	Custom Object 01	Top
CustObj1 Prod	CustObj1	Products	M-M
Custom Object 1 CustomObject4 (Custom Object 1 Id)	CustObj1	Custom Objects 04	1-M-PRIMARY
CustObj1 CustObj3	CustObj1	Custom Objects 03	M-M
Custom Object 1 CustomObject5 (Custom Object 1 Id)	CustObj1	Custom Objects 05	1-M-PRIMARY
CustObj1 Cmpltd Activity	CustObj1	Completed Activities	M-M-PRIMARY
CustObj1 Open Activity	CustObj1	Open Activities	M-M-PRIMARY
CustObj1 CustObj1	CustObj1	Custom Objects 01	M-M

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustObj1 Camp	CustObj1	Campaigns	M-M
Custom Object 1 CustomObject8 (Custom Object 1 Id)	CustObj1	Custom Objects 08	1-M-PRIMARY
Custom Object 1 CustomObject7 (Custom Object 1 Id)	CustObj1	Custom Objects 07	1-M-PRIMARY
CustObj1 Note	CustObj1	Notes	Child
CustObj1 CustObj2	CustObj1	Custom Objects 02	M-M
Custom Object 1 CustomObject6 (Custom Object 1 Id)	CustObj1	Custom Objects 06	1-M-PRIMARY
Custom Object 1 CustomObject9 (Custom Object 1 Id)	CustObj1	Custom Objects 09	1-M-PRIMARY
CustObj1 Service Request	CustObj1	Service Requests	M-M
CustObj1 Lead	CustObj1	Leads	M-M
CustObj1 Contact	CustObj1	Contacts	M-M
CustObj1 Acct	CustObj1	Account Plural Name ENU	M-M
Custom Object 1 CustomObject10 (Custom Object 1 Id)	CustObj1	Custom Objects 10	1-M-PRIMARY
CustObj1 Team	CustObj1	Custom Objects 01 Team	Child
CustObj1 Solution	CustObj1	Solutions	M-M
CustObj1 Asset	CustObj1	Assets	M-M
CustObj1 Att	CustObj1	Attachments	Child
OnDemand Custom Object 1/Audit Trail Item 2	CustObj1	Audit Trail	ReadOnly
CustObj1 Opportunity	CustObj1	Opportunities	M-M-PRIMARY
Lead	Not applicable	Lead	Top
Lead CustomObject5 (Lead Id)	Lead	Custom Objects 05	1-M-PRIMARY
Lead/Audit Trail Item 2	Lead	Audit Trail	ReadOnly
Lead Open Activity	Lead	Open Activities	1-M-PRIMARY
Lead Sales Assmt	Lead	Lead Assessment	1-M
Lead CustomObject10 (Lead Id)	Lead	Custom Objects 10	1-M-PRIMARY
Lead CustomObject9 (Lead Id)	Lead	Custom Objects 09	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
Lead CustObj1	Lead	Custom Objects 01	M-M
Lead/LeadTeam	Lead	Lead Teams	Child
Lead CustomObject4 (Lead Id)	Lead	Custom Objects 04	1-M-PRIMARY
Lead CustomObject6 (Lead Id)	Lead	Custom Objects 06	1-M-PRIMARY
Lead CustomObject8 (Lead Id)	Lead	Custom Objects 08	1-M-PRIMARY
Lead Cmpltd Activity	Lead	Completed Activities	1-M-PRIMARY
Lead CustObj3	Lead	Custom Objects 03	M-M
Lead CustObj2	Lead	Custom Objects 02	M-M
Lead Att	Lead	Attachments	Child
Lead CustomObject7 (Lead Id)	Lead	Custom Objects 07	1-M-PRIMARY
CustomObject6	Not applicable	Custom Object 06	Top
CustomObject6 Custom Object 2 (CustomObject6 Id)	CustomObject6	Custom Objects 02	1-M-PRIMARY
CustomObject6 Campaign (CustomObject6 Id)	CustomObject6	Campaigns	1-M
CustomObject6 CustomObject9 (CustomObject6 Id)	CustomObject6	Custom Objects 09	1-M-PRIMARY
CustomObject6 Account (CustomObject6 Id)	CustomObject6	Account Plural Name ENU	1-M
CustomObject6 Custom Object 3 (CustomObject6 Id)	CustomObject6	Custom Objects 03	1-M-PRIMARY
CustomObject6 Lead (CustomObject6 Id)	CustomObject6	Leads	1-M
CustomObject6 CustomObject4 (CustomObject6 Id)	CustomObject6	Custom Objects 04	1-M-PRIMARY
CustomObject6 Solution (CustomObject6 Id)	CustomObject6	Solutions	1-M
CustomObject6 Opportunity (CustomObject6 Id)	CustomObject6	Opportunities	1-M-PRIMARY
CustomObject6 CustomObject6 (CustomObject6 Id)	CustomObject6	Custom Objects 06	1-M-PRIMARY
CustomObject6/Audit Trail Item 2	CustomObject6	Audit Trail	ReadOnly

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CustomObject6 Contact (CustomObject6 Id)	CustomObject6	Contacts	1-M
CustomObject6 Product (CustomObject6 Id)	CustomObject6	Products	Child
CustomObject6 CustomObject10 (CustomObject6 Id)	CustomObject6	Custom Objects 10	1-M-PRIMARY
CustomObject6 Activity (CustomObject6 Id)	CustomObject6	Activities	1-M-PRIMARY
CustomObject6 Custom Object 1 (CustomObject6 Id)	CustomObject6	Custom Objects 01	1-M-PRIMARY
CustomObject6 CustomObject7 (CustomObject6 Id)	CustomObject6	Custom Objects 07	1-M-PRIMARY
CustomObject6 Asset (CustomObject6 Id)	CustomObject6	Assets	1-M
CustomObject6 CustomObject8 (CustomObject6 Id)	CustomObject6	Custom Objects 08	1-M-PRIMARY
CustomObject6 Service Request (CustomObject6 Id)	CustomObject6	Service Requests	1-M
CustomObject6 CustomObject5 (CustomObject6 Id)	CustomObject6	Custom Objects 05	1-M-PRIMARY
CustomObject6 Revenue (CustomObject6 Id)	CustomObject6	Revenues	Child
CustomObject6/CustomObject6Team	CustomObject6	Custom Object 06 Teams	Child
Contact	Not applicable	Contact	Top
Contact CustomObject6 (Contact Id)	Contact	Custom Objects 06	1-M-PRIMARY
Contact Acct	Contact	Account Plural Name ENU	M-M
Contact CustObj2	Contact	Custom Objects 02	M-M
Contact CustomObject7 (Contact Id)	Contact	Custom Objects 07	1-M-PRIMARY
Contact Open Activity	Contact	Open Activities	M-M-PRIMARY
Contact Lead	Contact	Leads	1-M
Contact CustomObject8 (Contact Id)	Contact	Custom Objects 08	1-M-PRIMARY
Contact SR	Contact	Service Requests	1-M

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
Contact CustomObject9 (Contact Id)	Contact	Custom Objects 09	1-M-PRIMARY
Contact CustObj3	Contact	Custom Objects 03	M-M
Contact CustomObject10 (Contact Id)	Contact	Custom Objects 10	1-M-PRIMARY
Contact CRMODLS_OBJECTIVE (Contact Name Id)	Contact	Objectives	1-M-PRIMARY
Contact Att	Contact	Attachments	Child
Contact Camp	Contact	Campaigns	1-M
Contact Cmpltd Activity	Contact	Completed Activities	M-M-PRIMARY
Contact Sales Assmt	Contact	Contact Assessment	1-M
Contact CRMODLS_BPL_CNTCT (Contact Id)	Contact	Plan Contacts	1-M-PRIMARY
Contact CustomObject5 (Contact Id)	Contact	Custom Objects 05	1-M-PRIMARY
Contact Asset	Contact	Assets	M-M
Contact CustomObject4 (Contact Id)	Contact	Custom Objects 04	1-M-PRIMARY
Contact Oppty	Contact	Opportunities	M-M-PRIMARY
Contact/Audit Trail Item 2	Contact	Audit Trail	ReadOnly
Contact Interest	Contact	Contact Interest	Child
Contact CustObj1	Contact	Custom Objects 01	M-M
Contact Team	Contact	Contact Teams	Child
Contact Note	Contact	Contact Notes	Child
Contact Addr	Contact	Addresses	Child
Sales Assmt	Not applicable	Assessment	Top
SA Value	Sales Assmt	Values	Child
CRMODLS_OBJECTIVE	Not applicable	Objective	Top
CRMODLS_OBJECTIVE/ CRMODLS_OBJECTIVETeam	CRMODLS_OBJECTIVE	Objective Teams	Child
CRMODLS_OBJECTIVE CustomObject10 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 10	1-M-PRIMARY
CRMODLS_OBJECTIVE Custom Object 1 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 01	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
CRMODLS_OBJECTIVE Opportunity (Objective Id)	CRMODLS_OBJECTIVE	Opportunities	1-M-PRIMARY
CRMODLS_OBJECTIVE Custom Object 3 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 03	1-M-PRIMARY
Objective Sales Assmt	CRMODLS_OBJECTIVE	Assessments	1-M
CRMODLS_OBJECTIVE CustomObject7 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 07	1-M-PRIMARY
CRMODLS_OBJECTIVE Service Request (Objective Id)	CRMODLS_OBJECTIVE	Service Requests	1-M
CRMODLS_OBJECTIVE Activity (Objective Id)	CRMODLS_OBJECTIVE	Activities	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject8 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 08	1-M-PRIMARY
CRMODLS_OBJECTIVE Lead (Objective Id)	CRMODLS_OBJECTIVE	Leads	1-M
CRMODLS_OBJECTIVE CustomObject6 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 06	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject4 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 04	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject5 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 05	1-M-PRIMARY
CRMODLS_OBJECTIVE Custom Object 2 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 02	1-M-PRIMARY
CRMODLS_OBJECTIVE CRMODLS_OBJECTIVE (Parent Objective Id)	CRMODLS_OBJECTIVE	Objectives	1-M-PRIMARY
CRMODLS_OBJECTIVE CRMODLS_OBJECTIVE_ATTACHMENT (CRMODLS_OBJECTIVE Id)	CRMODLS_OBJECTIVE	Objective Attachments	Child
CRMODLS_OBJECTIVE CustomObject9 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 09	1-M-PRIMARY
Service Request	Not applicable	Service Request	Top
SR CustObj1	Service Request	Custom Objects 01	M-M
Service Request CustomObject4 (Service Request Id)	Service Request	Custom Objects 04	1-M-PRIMARY

Table 59. Object Names in the XML File and Their Corresponding Display Names in the User Interface for Oracle CRM On Demand

Object Name in the XML File	Parent	Display Name	Type
Service Request/Service RequestTeam	Service Request	Service Request Teams	Child
Service Request CustomObject5 (Service Request Id)	Service Request	Custom Objects 05	1-M-PRIMARY
SR Solution	Service Request	Solutions	M-M
SR Audit Trail	Service Request	Audit Trail	ReadOnly
SR Att	Service Request	Attachments	Child
SR Cmpltd Activity	Service Request	Completed Activities	1-M-PRIMARY
SR CustObj3	Service Request	Custom Objects 03	M-M
Service Request CustomObject8 (Service Request Id)	Service Request	Custom Objects 08	1-M-PRIMARY
SR Open Activity	Service Request	Open Activities	1-M-PRIMARY
Service Request CustomObject9 (Service Request Id)	Service Request	Custom Objects 09	1-M-PRIMARY
SR Sales Assmt	Service Request	SR Assessment	1-M
SR CustObj2	Service Request	Custom Objects 02	M-M
Service Request CustomObject7 (Service Request Id)	Service Request	Custom Objects 07	1-M-PRIMARY
Service Request CustomObject6 (Service Request Id)	Service Request	Custom Objects 06	1-M-PRIMARY
SR Note	Service Request	Notes	Child
Service Request CustomObject10 (Service Request Id)	Service Request	Custom Objects 10	1-M-PRIMARY

Access Levels and Their Corresponding Permission Codes in the XML File

This topic describes the access levels to objects in Oracle CRM On Demand and their corresponding permission codes in the XML file you are working with. For a given access level to an object in Oracle CRM On Demand, use [Table 60](#) to look up the permission code that appears in the XML file and cross-reference the permission code with the access level in the Oracle CRM On Demand user interface. For more information on access levels, see the access profile information in *Oracle CRM On Demand Online Help*.

Table 60. Access Levels to Objects in Oracle CRM On Demand and Their Corresponding Permission Codes in the XML File

Object Type	Permissions	Permission Codes
Top-Level Object	Read-Only	R
Top-Level Object	Read/Edit	RU
Top-Level Object	Read/Edit/Delete	RUD
Related Information Object Type: Child	Read/Create	CR
Related Information Object Type: Child	Read/Create/Edit	CRU
Related Information Object Type: Child	Read-Only	R
Related Information Object Type: Child	Read/Edit	RU
Related Information Object Type: Child	Read/Edit/Delete	RUD
Related Information Object Type: Child	Full	CRUD
Related Information Object Type: Child	No Access	No value
Related Information Object Type: 1-M (One-to-Many)	Full	CRUD
Related Information Object Type: 1-M (One-to-Many)	Read-Only	R
Related Information Object Type: 1-M (One-to-Many)	No Access	No value
Related Information Object Type: 1-M-Primary (One-to-Many Primary)	Full	CRUD
Related Information Object Type: 1-M-Primary (One-to-Many Primary)	Read-Only	R
Related Information Object Type: 1-M-Primary (One-to-Many Primary)	No Access	No value
Related Information Object Type: 1-M-Primary (One-to-Many Primary)	Inherit Primary	CRUDI
Related Information Object Type: M-M (Many-to-Many)	Read/Create	CR
Related Information Object Type: M-M (Many-to-Many)	Read-Only	R
Related Information Object Type: M-M (Many-to-Many)	Full	CRUD

Table 60. Access Levels to Objects in Oracle CRM On Demand and Their Corresponding Permission Codes in the XML File

Object Type	Permissions	Permission Codes
Related Information Object Type: M-M (Many-to-Many)	No Access	No value
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Full	CRUD
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Read-Only	R
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	No Access	No value
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Add/Inherit Primary	CRUDAI
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Add/Remove/Inherit Primary	CRUDAXI
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Inherit Primary	CRUDI
Related Information Object Type: Read-Only	Read-Only	R
Related Information Object Type: Read-Only	No Access	No value

Icons for Custom Record Types

This topic lists the icons used for objects in Oracle CRM On Demand and their corresponding names in the Custom Record Type XML file.

[Table 61](#) list the icons for the custom record types and their file names as provided with Oracle CRM On Demand.

Table 61. Icons for Custom Record Types




Icon Name	Icon
1006.gif	
1033.gif	
1048.gif	

Table 61. Icons for Custom Record Types













Icon Name	Icon
1056.gif	
1801.gif	
1824.gif	
1826.gif	
16_account.png	
16_accountPDQPinned.png	
16_accounts.png	
16_account_contact.png	
16_addresses.png	
16_alerts_grid.png	
16_analytics_grid.png	
16_aroundme_grid.png	

Table 61. Icons for Custom Record Types









Icon Name	Icon
16_bestCallTime.png	
16_calendar_grid.png	
16_callHistory.png	
16_callProductDetails.png	
16_contacts.png	
16_contacts_grid.png	
16_generic_grid.png	
16_gift.png	
16_launchDetailer.png	
16_launchPresentation.png	
16_leads_grid.png	
16_licenses.png	

Table 61. Icons for Custom Record Types













Icon Name	Icon
16_opportunities_grid.png	
16_presentationDetails.png	
16_relationships.png	
16_sales_accounts_grid.png	
16_sample.png	
16_samples.png	
16_tasks_grid.png	
application_form.png	
application_view_tile.png	
arrow_divide.png	
asterisk_orange.png	
attach.png	

Table 61. Icons for Custom Record Types

Icon Name	Icon
award_star_gold_1.png	
bell.png	
box.png	
brick.png	
bug.png	
building.png	
cake.png	
camera.png	
campaign_status.gif	
car.png	
cart.png	
catalog_status.gif	

Table 61. Icons for Custom Record Types


Icon Name	Icon
certificaterequired.gif	
chart_bar.png	
chart_organisation.png	
chart_pie.png	
clock.png	
cog.png	
coins.png	
commentind_active.gif	
controller.png	
cup.png	
derived_bidi_status.gif	
disconnect.png	

Table 61. Icons for Custom Record Types

Icon Name	Icon
drive_network.png	
email.png	
eye.png	
feed_icon.gif	
female.png	
film.png	
flag_green.png	
heart.png	
house.png	
HR_IMAGE5_85.gif	
HR_IMAGE5_184.gif	
HR_IMAGE5_221.gif	

Table 61. Icons for Custom Record Types

Icon Name	Icon
HR_IMAGE5_249.gif	
HR_IMAGE5_593.gif	
HR_IMAGE5_678.gif	
icon_custtab.gif	
instore_status.gif	
ipod.png	
key.png	
lightbulb.png	
lightning.png	
locked_status.gif	
male.png	
map.png	

Table 61. Icons for Custom Record Types





Icon Name	Icon
money.png	
money_dollar.png	
money_euro.png	
mouse.png	
newupdateditem_status.gif	
onvacation_status.gif	
orders_icon.gif	
package_green.png	
paintcan.png	
palette.png	
phone.png	
photo.png	

Table 61. Icons for Custom Record Types

Icon Name	Icon
plugin.png	
primary_status.gif	
printer.png	
quotes_icon.gif	
rainbow.png	
register_status.gif	
rosette.png	
rte_image_enabled.gif	
rte_paste_enabled.gif	
ruby.png	
shield.png	
sound.png	

Table 61. Icons for Custom Record Types








Icon Name	Icon
sport_football.png	
sport_soccer.png	
telephone.png	
television.png	
timeexpires_status.gif	
transmit.png	
tree_alert.gif	
tree_collateral.gif	
tree_component.gif	
tree_configextension.gif	
tree_contentobject.gif	
tree_database.gif	

Table 61. Icons for Custom Record Types

Icon Name	Icon
tree_forum.gif	
tree_grades.gif	
tree_graph.gif	
tree_library.gif	
tree_messages.gif	
tree_property.gif	
tree_server.gif	
tree_servicerequest.gif	
tree_sharedobjects.gif	
tree_site.gif	
tree_testobject.gif	
tree_workflow.gif	

Table 61. Icons for Custom Record Types

Icon Name	Icon
tux.png	
user_gray.png	
user_orange.png	
wand.png	
weather_sun.png	
webpage_status.gif	
world.png	
zoom.png	

System Names for Record Types

Table 62 lists the system name for record types and their corresponding display name in the user interface for Oracle CRM On Demand.

Table 62. System Name for Record Types in the Oracle CRM On Demand User Interface

System Name	Display Name in the User Interface
Account Contact	Account Contact
Account Team	Account Team
Account	Account
AccountAddress	AccountAddress

Table 62. System Name for Record Types in the Oracle CRM On Demand User Interface

System Name	Display Name in the User Interface
AccountRelationship	AccountRelationship
Accreditation	Accreditation
AccreditationRelationship	AccreditationRelationship
AccreditationRequest	AccreditationRequest
AccreditationTeam	AccreditationTeam
Activity	Activity
Application	Application
ApplicationTeam	ApplicationTeam
Asset	Asset
Book User	Book User
Book	Book
BrokerProfile	BrokerProfile
CRMODLS_BPL_ACNT	CRMODLS_BPL_ACNT
CRMODLS_BPL_CNTCT	CRMODLS_BPL_CNTCT
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan
CRMODLS_BusinessPlanTeam	CRMODLS_BusinessPlanTeam
CRMODLS_InventoryAuditReport	CRMODLS_InventoryAuditReport
CRMODLS_InventoryPeriod	CRMODLS_InventoryPeriod
CRMODLS_ModificationLog	CRMODLS_ModificationLog
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE
CRMODLS_OBJECTIVETeam	CRMODLS_OBJECTIVETeam
CRMODLS_PCD_MSGRSP	Message Response
CRMODLS_PlanOpportunities	CRMODLS_PlanOpportunities
CRMODLS_SIGNDISC	CRMODLS_SIGNDISC
CRMODLS_SampleInventory	CRMODLS_SampleInventory
CRMODLS_SampleLot	CRMODLS_SampleLot
CRMODLS_Signature	CRMODLS_Signature
CRMOD_LS_Allocation	CRMOD_LS_Allocation
CRMOD_LS_ContactLicenses	CRMOD_LS_ContactLicenses
CRMOD_LS_MessagingPlan	Message Plan
CRMOD_LS_MsgPlanItem	Message Plan Item

Table 62. System Name for Record Types in the Oracle CRM On Demand User Interface

System Name	Display Name in the User Interface
CRMOD_LS_MsgPlnRel	CRMOD_LS_MsgPlnRel
CRMOD_LS_TransactionItems	CRMOD_LS_TransactionItems
CRMOD_LS_Transactions	CRMOD_LS_Transactions
Call MessagePlanVBC	Call MessagePlanVBC
Call ProdDetail	Call ProdDetail
Call ProdDetailVBC	Call ProdDetailVBC
Call PromItemDrop	Call PromItemDrop
Call PromItemDropVBC	Call PromItemDropVBC
Call SampDrop	Call SampDrop
Call SampDropVBC	Call SampDropVBC
Campaign	Campaign
Certification	Certification
CertificationRelationship	CertificationRelationship
CertificationRequest	CertificationRequest
CertificationTeam	CertificationTeam
Channel Partner Territory	Channel Partner Territory
Channel Partner	Channel Partner
Claim	Claim
Contact Team	Contact Team
Contact	Contact
ContactAddress	ContactAddress
ContactBestTimes	ContactBestTimes
ContactCampaign	ContactCampaign
ContactInterest	ContactInterest
ContactRelationship	ContactRelationship
Course	Course
CourseEnrollment	CourseEnrollment
CourseRelationship	CourseRelationship
CourseTeam	CourseTeam
Coverage	Coverage
CustObj1 Team	CustObj1 Team

Table 62. System Name for Record Types in the Oracle CRM On Demand User Interface

System Name	Display Name in the User Interface
CustObj2 Team	CustObj2 Team
CustObj3 Team	CustObj3 Team
Custom Object 1	Custom Object 1
Custom Object 2	Custom Object 2
Custom Object 3	Custom Object 3
CustomObject10	CustomObject10
CustomObject10Team	CustomObject10Team
CustomObject11	CustomObject11
CustomObject11Team	CustomObject11Team
CustomObject12	CustomObject12
CustomObject12Team	CustomObject12Team
CustomObject13	CustomObject13
CustomObject13Team	CustomObject13Team
CustomObject14	CustomObject14
CustomObject14Team	CustomObject14Team
CustomObject15	CustomObject15
CustomObject15Team	CustomObject15Team
CustomObject16	CustomObject16
CustomObject16Team	CustomObject16Team
CustomObject17	CustomObject17
CustomObject17Team	CustomObject17Team
CustomObject18	CustomObject18
CustomObject18Team	CustomObject18Team
CustomObject19	CustomObject19
CustomObject19Team	CustomObject19Team
CustomObject20	CustomObject20
CustomObject20Team	CustomObject20Team
CustomObject21	CustomObject21
CustomObject21Team	CustomObject21Team
CustomObject22	CustomObject22
CustomObject22Team	CustomObject22Team

Table 62. System Name for Record Types in the Oracle CRM On Demand User Interface

System Name	Display Name in the User Interface
CustomObject23	CustomObject23
CustomObject23Team	CustomObject23Team
CustomObject24	CustomObject24
CustomObject24Team	CustomObject24Team
CustomObject25	CustomObject25
CustomObject25Team	CustomObject25Team
CustomObject26	CustomObject26
CustomObject26Team	CustomObject26Team
CustomObject27	CustomObject27
CustomObject27Team	CustomObject27Team
CustomObject28	CustomObject28
CustomObject28Team	CustomObject28Team
CustomObject29	CustomObject29
CustomObject29Team	CustomObject29Team
CustomObject30	CustomObject30
CustomObject30Team	CustomObject30Team
CustomObject31	CustomObject31
CustomObject31Team	CustomObject31Team
CustomObject32	CustomObject32
CustomObject32Team	CustomObject32Team
CustomObject33	CustomObject33
CustomObject33Team	CustomObject33Team
CustomObject34	CustomObject34
CustomObject34Team	CustomObject34Team
CustomObject35	CustomObject35
CustomObject35Team	CustomObject35Team
CustomObject36	CustomObject36
CustomObject36Team	CustomObject36Team
CustomObject37	CustomObject37
CustomObject37Team	CustomObject37Team
CustomObject38	CustomObject38

Table 62. System Name for Record Types in the Oracle CRM On Demand User Interface

System Name	Display Name in the User Interface
CustomObject38Team	CustomObject38Team
CustomObject39	CustomObject39
CustomObject39Team	CustomObject39Team
CustomObject4	CustomObject4
CustomObject40	CustomObject40
CustomObject40Team	CustomObject40Team
CustomObject4Team	CustomObject4Team
CustomObject5	CustomObject5
CustomObject5Team	CustomObject5Team
CustomObject6	CustomObject6
CustomObject6Team	CustomObject6Team
CustomObject7	CustomObject7
CustomObject7Team	CustomObject7Team
CustomObject8	CustomObject8
CustomObject8Team	CustomObject8Team
CustomObject9	CustomObject9
CustomObject9Team	CustomObject9Team
Damage	Damage
DealRegistration	DealRegistration
DealRegistrationRevenue	DealRegistrationRevenue
DealRegistrationTeam	DealRegistrationTeam
DealerAddress	DealerAddress
Delegated User	Delegated User
DirectSend	DirectSend
Exam	Exam
ExamRegistration	ExamRegistration
ExamRelationship	ExamRelationship
ExamTeam	ExamTeam
FinancialAccount	FinancialAccount
FinancialAccountHolder	FinancialAccountHolder
FinancialAccountHolding	FinancialAccountHolding

Table 62. System Name for Record Types in the Oracle CRM On Demand User Interface

System Name	Display Name in the User Interface
FinancialPlan	FinancialPlan
FinancialProduct	FinancialProduct
FinancialTransaction	FinancialTransaction
Fund Request	Fund Request
Fund	Fund
Household Contact	Household Contact
Household	Household
HouseholdTeam	HouseholdTeam
InsuranceProperty	InsuranceProperty
InvolvedParty	InvolvedParty
Lead	Lead
LeadTeam	LeadTeam
MDFRequest	MDFRequest
MDFRequestTeam	MDFRequestTeam
MedEdEvent	MedEdEvent
MedEdInvitee	MedEdInvitee
Opportunity Contact Role	Opportunity Contact Role
Opportunity Team	Opportunity Team
Opportunity	Opportunity
OpportunityCompetitor	OpportunityCompetitor
OpportunityPartner	OpportunityPartner
Order	Order
OrderItem	OrderItem
PRMDelegatedAdmin	PRMDelegatedAdmin
Partner	Partner
PartnerAccount	PartnerAccount
PartnerAddress	PartnerAddress
PartnerOpportunity	PartnerOpportunity
PartnerProgram	PartnerProgram
PartnerTeam	PartnerTeam
PartnerType	PartnerType

Table 62. System Name for Record Types in the Oracle CRM On Demand User Interface

System Name	Display Name in the User Interface
Patient	Patient
PatientAsset	PatientAsset
PatientContact	PatientContact
PatientTeam	PatientTeam
Policy	Policy
PolicyHolder	PolicyHolder
Portfolio	Portfolio
PortfolioOwners	PortfolioOwners
PortfolioTeam	PortfolioTeam
PriceList	PriceList
PriceListLineItem	PriceListLineItem
Product	Product
Program	Program
ProgramPartner	ProgramPartner
Quote	Quote
Revenue	Revenue
SPRequest	SPRequest
SPRequestLineItem	SPRequestLineItem
SPRequestTeam	SPRequestTeam
Sales Assessment Template	Sales Assessment Template
Service Request	Service Request
Service RequestTeam	Service RequestTeam
SharedAddress	SharedAddress
Solution	Solution
User	User
Vehicle FinInfo	Vehicle FinInfo
Vehicle SalesHist	Vehicle SalesHist
Vehicle ServHist	Vehicle ServHist
Vehicle	Vehicle

Homepage Layout Mapping

Table 63 lists the mapping of Homepage layout names to their display names in the UI for various Oracle CRM On Demand objects.

NOTE: The Oracle Migration Tool On Demand client does not support Homepage layout migration for the following record types: Forecast, Daily Calendar, Reports, and Dashboard.

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Account	All Recently Created Accounts	Recently Created Accounts
Account	All Recently Modified Accounts	Recently Modified Accounts
Account	MyRecentlyCreatedAccounts	My Recently Created Accounts
Account	MyRecentlyModifiedAccounts	My Recently Modified Accounts
Account	MyCurrentAccountTasks	My Current Account Related Tasks
Account	AllOpenAccountTasks	Account Tasks
Account	HomepageAccountList	Account Lists
Account	AccountsRecentlyViewedList	My Recently Viewed Accounts
Account	MyOpenAccountTasks	My Open Account Related Tasks
Account	Account Analysis Report	Account Analysis
Accreditation	Accreditation.MyRecentlyModified	My Recently Modified Accreditations
Accreditation	Accreditation.MyRecentlyCreated	My Recently Created Accreditations
Accreditation	Accreditation.MyList	My Accreditations
Accreditation	Accreditation.AllRetiring	Retiring Accreditations
Accreditation	Accreditation.AllRecentlyIntroduced	Recently Introduced Accreditations
Accreditation	Accreditation.AllRecentlyModified	Recently Modified Accreditations
Accreditation	Accreditation.AllRecentlyCreated	Recently Created Accreditations
Accreditation	Accreditation.AllList	All Accreditations
Accreditation	Accreditation.MyRecentlyViewedListLayout	My Recently Viewed Accreditations
Allocation	CRMOD_LS_Allocation.AllList	Allocation Lists
Allocation	CRMOD_LS_Allocation.AllRecentlyModified	Recently Modified Allocations
Application	Application.AllApplication	All Applications
Application	Application.MyApplication	My Applications

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Application	Application.AllSubmitted	All Submitted Applications
Application	Application.AllRejected	All Rejected Applications
Application	Application.AllApproved	All Approved Applications
Application	Application.AllList	OCCAM_ALLLIST_ENTITY
Application	Application.MyRecentlyModified	My Recently Modified Applications
Application	Application.MyRecentlyCreated	My Recently Created Applications
Business Plan	CRMODLS_BusinessPlan.AllList	All Business Plans
Business Plan	CRMODLS_BusinessPlan.AllRecentlyModified	Recently Modified Business Plans
Campaign	MyCurrentCampaignTasks	My Current Campaign Related Tasks
Campaign	MyOpenCampaignTasks	My Open Campaign Related Tasks
Campaign	MyRecentlyCreatedCampaigns	My Recently Created Campaigns
Campaign	All Recently Modified Campaigns	Recently Modified Campaigns
Campaign	All Recently Created Campaigns	Recently Created Campaigns
Campaign	MyRecentlyModifiedCampaigns	My Recently Modified Campaigns
Campaign	CampaignList	All Campaigns
Campaign	CampaignRecentlyViewedList	My Recently Viewed Campaigns
Campaign	AllOpenCampaignTasks	Campaign Tasks
Campaign	Homepage Active Campaigns	Active Campaigns
Campaign	Active Campaign Status Report	Active Campaign Status
Certification	Certification.MyRecentlyModified	My Recently Modified Certifications
Certification	Certification.MyRecentlyCreated	My Recently Created Certifications
Certification	Certification.MyList	My Certifications
Certification	Certification.AllRetiring	Retiring Certifications
Certification	Certification.AllRecentlyIntroduced	Recently Introduced Certifications
Certification	Certification.AllRecentlyCreated	Recently Created Certifications
Certification	Certification.AllList	All Certifications
Certification	Certification.MyRecentlyViewedList Layout	My Recently Viewed Certifications

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Certification	Certification.AllRecentlyModified	Recently Modified Certifications
Claim	Claim.AllList	Claim Lists
Claim	Claim.AllRecentlyModified	Recently Modified Claims
Contact	AllOpenContactTasks	Contact Tasks
Contact	MyCurrentContactTasks	My Current Contact Related Tasks
Contact	All Recently Modified Contacts	Recently Modified Contacts
Contact	All Recently Created Contacts	Recently Created Contacts
Contact	MyRecentlyCreatedContacts	My Recently Created Contacts
Contact	MyRecentlyModifiedContacts	My Recently Modified Contacts
Contact	HomepageContactList	Contact Lists
Contact	ContactsRecentlyViewedList	My Recently Viewed Contacts
Contact	MyOpenContactTasks	My Open Contact Related Tasks
Contact	Contact Analysis By Account Report	Contact Analysis By Account
Contact State License	CRMOD_LS_ContactLicenses.AllList	Contact State License Lists
Contact State License	CRMOD_LS_ContactLicenses.AllRecentlyModified	Recently Modified Contact State Licenses
Course	Course.MyRecentlyModified	My Recently Modified Courses
Course	Course.MyRecentlyCreated	My Recently Created Courses
Course	Course.MyList	My Courses
Course	Course.AllRetiring	Retiring Courses
Course	Course.AllRecentlyIntroduced	Recently Introduced Courses
Course	Course.AllRecentlyCreated	Recently Created Courses
Course	Course.AllRecentlyModified	Recently Modified Courses
Course	Course.AllList	All Courses
Course	Course.MyRecentlyViewedListLayout	My Recently Viewed Courses
Coverage	Coverage.AllList	Coverage Lists
Coverage	Coverage.AllRecentlyModified	Recently Modified Coverages
Custom Object 1	My Recently Created CustObjs1	My Recently Created Custom Objects 01
Custom Object 1	My Recently Modified CustObjs1	My Recently Modified Custom Objects 01

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Custom Object 1	All Recently Created CustObjs1	Recently Created Custom Objects 01
Custom Object 1	All Recently Modified CustObjs1	Recently Modified Custom Objects 01
Custom Object 1	CustObj1List	All Custom Objects 01
Custom Object 1	CO1RecentlyViewedList	My Recently Viewed Custom Objects 01
Custom Object 2	My Recently Created CustObjs2	My Recently Created Custom Objects 02
Custom Object 2	My Recently Modified CustObjs2	My Recently Modified Custom Objects 02
Custom Object 2	All Recently Created CustObjs2	Recently Created Custom Objects 02
Custom Object 2	All Recently Modified CustObjs2	Recently Modified Custom Objects 02
Custom Object 2	CustObj2List	All Custom Objects 02
Custom Object 2	CO2RecentlyViewedList	My Recently Viewed Custom Objects 02
Custom Object 3	All Recently Modified CustObjs3	Recently Modified Custom Objects 03
Custom Object 3	My Recently Created CustObjs3	My Recently Created Custom Objects 03
Custom Object 3	All Recently Created CustObjs3	Recently Created Custom Objects 03
Custom Object 3	My Recently Modified CustObjs3	My Recently Modified Custom Objects 03
Custom Object 3	CustObj3List	All Custom Objects 03
Custom Object 3	CO3RecentlyViewedList	My Recently Viewed Custom Objects 03
CustomObject10	CustomObject10.AllList	All Custom Objects 10
CustomObject10	CustomObject10.AllRecentlyModified	Recently Modified Custom Objects 10
CustomObject11	CustomObject11.AllList	All Custom Objects 11
CustomObject11	CustomObject11.AllRecentlyModified	Recently Modified Custom Objects 11
CustomObject12	CustomObject12.AllList	All Custom Objects 12

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
CustomObject12	CustomObject12.AllRecentlyModified	Recently Modified Custom Objects 12
CustomObject13	CustomObject13.AllList	All Custom Objects 13
CustomObject13	CustomObject13.AllRecentlyModified	Recently Modified Custom Objects 13
CustomObject14	CustomObject14.AllList	All Custom Objects 14
CustomObject14	CustomObject14.AllRecentlyModified	Recently Modified Custom Objects 14
CustomObject15	CustomObject15.AllList	All Custom Objects 15
CustomObject15	CustomObject15.AllRecentlyModified	Recently Modified Custom Objects 15
CustomObject4	CustomObject4.AllList	All Custom Objects 04
CustomObject4	CustomObject4.AllRecentlyModified	Recently Modified Custom Objects 04
CustomObject5	CustomObject5.AllList	All Custom Objects 05
CustomObject5	CustomObject5.AllRecentlyModified	Recently Modified Custom Objects 05
CustomObject6	CustomObject6.AllList	All Custom Objects 06
CustomObject6	CustomObject6.AllRecentlyModified	Recently Modified Custom Objects 06
CustomObject7	CustomObject7.AllList	All Custom Objects 07
CustomObject7	CustomObject7.AllRecentlyModified	Recently Modified Custom Objects 07
CustomObject8	CustomObject8.AllList	All Satellites
CustomObject8	CustomObject8.AllRecentlyModified	Recently Modified Satellites
CustomObject9	CustomObject9.AllList	All Custom Objects 09
CustomObject9	CustomObject9.AllRecentlyModified	Recently Modified Custom Objects 09
Damage	Damage.AllList	Damage Lists
Damage	Damage.AllRecentlyModified	Recently Modified Damages
Dealer (Channel Partner)	My Recently Created Dealers	My Recently Created Dealers
Dealer (Channel Partner)	My Recently Modified Dealers	My Recently Modified Dealers

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Dealer (Channel Partner)	All Recently Created Dealers	Recently Created Dealers
Dealer (Channel Partner)	All Recently Modified Dealers	Recently Modified Dealers
Dealer (Channel Partner)	DealerList	All Dealers
Dealer (Channel Partner)	DealersRecentlyViewedList	My Recently Viewed Dealers
Dealer (Channel Partner)	OptyList	All Opportunities
Deal Registration	DealRegistration. ApprovedDRPDQLayout	Active Deal Registrations
Deal Registration	DealRegistration. DRNoActivityPDQLayout	Deal Registrations with no Activity in the Past 30 Days
Deal Registration	DealRegistration.DRExpiryPDQLayout	Deal Registrations Expiring in the Next 30 Days
Deal Registration	DealRegistration. RecentlyCreatedPDQLayout	Recently Created Deal Registrations
Deal Registration	DealRegistration.AllRecentlyModified	Recently Modified Deal Registrations
Deal Registration	DealRegistration.AllList	All Deal Registrations
Deal Registration	DealRegistration.MyApprovalPDQLayout	Deal Registrations Waiting for My Approval
Exam	Exam.MyRecentlyModified	My Recently Modified Exams
Exam	Exam.MyRecentlyCreated	My Recently Created Exams
Exam	Exam.MyList	My Exams
Exam	Exam.AllRetiring	Retiring Exams
Exam	Exam.AllRecentlyIntroduced	Recently Introduced Exams
Exam	Exam.AllRecentlyCreated	Recently Created Exams
Exam	Exam.AllRecentlyModified	Recently Modified Exams
Exam	Exam.AllList	All Exams
Exam	Exam.MyRecentlyViewedListLayout	My Recently Viewed Exams
Financial Account	FinancialAccount.AllList	Financial Account Lists
Financial Account	FinancialAccount.AllRecentlyModified	Recently Modified Financial Accounts

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Financial Account Holder	FinancialAccountHolder.AllList	Financial Account Holder Lists
Financial Account Holder	FinancialAccountHolder.AllRecentlyModified	Recently Modified Financial Account Holders
Financial Account Holding	FinancialAccountHolding.AllList	Financial Account Holding Lists
Financial Account Holding	FinancialAccountHolding.AllRecentlyModified	Recently Modified Financial Account Holdings
Financial Plan	FinancialPlan.AllList	Financial Plan Lists
Financial Plan	FinancialPlan.AllRecentlyModified	Recently Modified Financial Plans
Financial Product	FinancialProduct.AllList	Financial Product Lists
Financial Product	FinancialProduct.AllRecentlyModified	Recently Modified Financial Products
Financial Transaction	FinancialTransaction.AllList	Financial Transaction Lists
Financial Transaction	FinancialTransaction.AllRecentlyModified	Recently Modified Financial Transactions
Fund	All Pending Fund Requests	Pending Fund Requests
Fund	FundList	All Funds
Fund	FundRequestList	All Fund Requests
Fund	My Pending Fund Requests	My Pending Fund Requests
Fund	FundRequestOpenActivities	Fund Request - Open Activities
Household	My Recently Created Households	My Recently Created Households
Household	My Recently Modified Households	My Recently Modified Households
Household	All Recently Created Households	Recently Created Households
Household	All Recently Modified Households	Recently Modified Households
Household	HouseholdList	All Households
Household	HouseholdsRecentlyViewedList	My Recently Viewed Households
Insurance Property	InsuranceProperty.AllList	Insurance Property Lists
Insurance Property	InsuranceProperty.AllRecentlyModified	Recently Modified Insurance Properties
Inventory Period	CRMODLS_InventoryPeriod.AllList	Inventory Period Lists
Inventory Period	CRMODLS_InventoryPeriod.AllRecentlyModified	Recently Modified Inventory Periods

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Involved Party	InvolvedParty.AllList	Involved Party Lists
Involved Party	InvolvedParty.AllRecentlyModified	Recently Modified Involved Parties
Lead	AllOpenLeadTasks	Lead Tasks
Lead	MyCurrentLeadTasks	My Current Lead Related Tasks
Lead	All Recently Created Leads	Recently Created Leads
Lead	All Recently Modified Leads	Recently Modified Leads
Lead	MyRecentlyModifiedLeads	My Recently Modified Leads
Lead	HomepageLeadsList	Lead Lists
Lead	LeadsRecentlyViewedList	My Recently Viewed Leads
Lead	MyRecentlyCreatedLeads	My Recently Created Leads
Lead	MyOpenLeadTasks	My Open Lead Related Tasks
Lead	LeadList	Qualified Leads
Lead	Lead Followup Analysis Report	Lead Followup Analysis
MDFRequest	MDFRequest.PendingMyApproval	MDF Requests Pending My Approval
MDFRequest	MDFRequest.MyApproved	My Approved MDF Requests
MDFRequest	MDFRequest.AllPending	All Pending MDF Requests
MDFRequest	MDFRequest.MyRecentlyModified	My Recently Modified MDF Requests
MDFRequest	MDFRequest.MyRecentlyCreated	My Recently Created MDF Requests
MDFRequest	MDFRequest.MyList	My MDF Requests
MDFRequest	MDFRequest.AllRecentlyCreated	Recently Created MDF Requests
MDFRequest	MDFRequest.AllList	All MDF Requests
MDFRequest	MDFRequest.AllRecentlyModified	Recently Modified MDF Requests
MDFRequest	MDFRequest.MyPending	My Pending MDF Requests
MedEdEvent	My Recently Created MedEd Events	My Recently Created MedEd Events
MedEdEvent	My Recently Modified MedEd Events	My Recently Modified MedEd Events
MedEdEvent	All Recently Created MedEd Events	Recently Created MedEd Events
MedEdEvent	All Recently Modified MedEd Events	Recently Modified MedEd Events

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
MedEdEvent	MedEdList	All MedEd Events
MedEdEvent	MedEdsRecentlyViewedList	My Recently Viewed MedEd Events
MedEdEvent	Homepage Task MedEd	MedEd Event-Related Tasks
Messaging Plan	CRMOD_LS_MessagingPlan.AllList	Messaging Plan Lists
Messaging Plan	CRMOD_LS_MessagingPlan.AllRecentlyModified	Recently Modified Messaging Plans
Messaging Plan Item	CRMOD_LS_MsgPlanItem.AllList	Messaging Plan Item Lists
Messaging Plan Item	CRMOD_LS_MsgPlanItem.AllRecentlyModified	Recently Modified Messaging Plan Items
Messaging Plan Item Relations	CRMOD_LS_MsgPlnRel.AllList	Messaging Plan Item Relations Lists
Messaging Plan Item Relations	CRMOD_LS_MsgPlnRel.AllRecentlyModified	Recently Modified Messaging Plan Item Relations
Objective	CRMODLS_OBJECTIVE.AllList	All Objectives
Objective	CRMODLS_OBJECTIVE.AllRecentlyModified	Recently Modified Objectives
Opportunity	All Recently Modified Opportunities	Recently Modified Opportunities
Opportunity	All Recently Created Opportunities	Recently Created Opportunities
Opportunity	MyRecentlyCreatedOpportunities	My Recently Created Opportunities
Opportunity	MyRecentlyModifiedOpportunities	My Recently Modified Opportunities
Opportunity	AllOpenOpptyTasks	Opportunity Tasks
Opportunity	MyCurrentOpptyTasks	My Current Opportunity Related Tasks
Opportunity	HomepageOpptyList	Opportunity Lists
Opportunity	OpptyRecentlyViewedList	My Recently Viewed Opportunities
Opportunity	MyOpenOpptyTasks	My Open Opportunity Related Tasks
Opportunity	Pipeline Analysis Report	Pipeline Analysis For Current Quarter
Oracle CRM On Demand Site	SolutionsRecentlyViewedList	My Recently Viewed Solutions

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Oracle CRM On Demand Site	CampaignsRecentlyViewedList	My Recently Viewed Campaigns
Oracle CRM On Demand Site	OpptyRecentlyViewedList	My Recently Viewed Opportunities
Oracle CRM On Demand Site	LeadsRecentlyViewedList	My Recently Viewed Leads
Oracle CRM On Demand Site	AccountsRecentlyViewedList	My Recently Viewed Accounts
Oracle CRM On Demand Site	ContactsRecentlyViewedList	My Recently Viewed Contacts
Oracle CRM On Demand Site	Open Service Request Analysis Report	Open Service Request Analysis
Oracle CRM On Demand Site	Active Campaign Status Report	Active Campaign Status
Oracle CRM On Demand Site	Lead Followup Analysis Report	Lead Followup Analysis
Oracle CRM On Demand Site	Pipeline Analysis Report	Pipeline Analysis For Current Quarter
Oracle CRM On Demand Site	Open Service Request Analysis Report	Open Service Request Analysis
Oracle CRM On Demand Site	Contact Analysis By Account Report	Contact Analysis By Account
Oracle CRM On Demand Site	Account Analysis Report	Account Analysis
Oracle CRM On Demand Site	MyRecentlyModifiedSolutions	My Recently Modified Solutions
Oracle CRM On Demand Site	New Service Request	My Open Service Requests
Oracle CRM On Demand Site	MyRecentlyModifiedOpportunities	My Recently Modified Opportunities
Oracle CRM On Demand Site	MyRecentlyModifiedContacts	My Recently Modified Contacts
Oracle CRM On Demand Site	MyRecentlyModifiedCampaigns	My Recently Modified Campaigns
Oracle CRM On Demand Site	MyRecentlyModifiedAccounts	My Recently Modified Accounts

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Oracle CRM On Demand Site	New Solution	Recently Created Solutions
Oracle CRM On Demand Site	New Opportunity	Recently Modified Opportunities
Oracle CRM On Demand Site	New Contact	Recently Modified Contacts
Oracle CRM On Demand Site	New Campaign	Recently Modified Campaigns
Oracle CRM On Demand Site	New Account	Recently Modified Accounts
Oracle CRM On Demand Site	New Lead	Recently Modified Leads
Oracle CRM On Demand Site	Homepage Task	Open Tasks
Oracle CRM On Demand Site	ApptList	Appointments
Oracle CRM On Demand Site	TaskList Home	My Open Tasks
Oracle CRM On Demand Site	Alert	Alerts
Oracle CRM On Demand Site	Alert	Alerts
Oracle CRM On Demand Site	MyRecentlyCreatedLeads	My Recently Created Leads
Oracle CRM On Demand Site	Pipeline Quality Report	Pipeline Quality For Current Quarter
Partner	All Recently Created Partners	Recently Created Partners
Partner	All Recently Modified Partners	Recently Modified Partners
Partner	MyRecentlyCreatedPartners	My Recently Created Partners
Partner	MyRecentlyModifiedPartners	My Recently Modified Partners
Partner	HomepagePartnerList	Partner Lists
Partner	PartnersRecentlyViewedList	My Recently Viewed Partners
Partners Program	All Active Partner Programs	All Active Partner Programs
Partners Program	All Inactive Partner Programs	All Inactive Partner Programs

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Partners Program	All Recently Modified Partner Programs	Recently Modified Partner Programs
Partners Program	All Recently Created Partner Programs	Recently Created Partner Programs
Partners Program	MyRecentlyCreatedPartnerPrograms	My Recently Created Partner Programs
Partners Program	MyRecentlyModifiedPartnerPrograms	My Recently Modified Partner Programs
Partners Program	HomepagePartnerProgramList	Partner Programs Lists
Partners Program	PartnerProgramsRecentlyViewedList	My Recently Viewed Partner Programs
Patient	My Recently Created Patients	My Recently Created Patients
Patient	My Recently Modified Patients	My Recently Modified Patients
Patient	All Recently Created Patients	Recently Created Patients
Patient	All Recently Modified Patients	Recently Modified Patients
Patient	PatientList	All Patients
Patient	PatientsRecentlyViewedList	My Recently Viewed Patients
Plan Account	CRMODLS_BPL_ACNT.AllList	All Plan Accounts
Plan Account	CRMODLS_BPL_ACNT.AllRecentlyModified	Recently Modified Plan Accounts
Plan Contact	CRMODLS_BPL_CNTCT.AllList	All Plan Contacts
Plan Contact	CRMODLS_BPL_CNTCT.AllRecentlyModified	Recently Modified Plan Contacts
Plan Opportunity	CRMODLS_PlanOpportunities.AllList	All Plan Opportunities
Plan Opportunity	CRMODLS_PlanOpportunities.AllRecentlyModified	Recently Modified Plan Opportunities
Policy	Policy.AllList	Policy Lists
Policy	Policy.AllRecentlyModified	Recently Modified Policies
Policy Holder	PolicyHolder.AllList	Policy Holder Lists
Policy Holder	PolicyHolder.AllRecentlyModified	Recently Modified Policy Holders
Portfolio	My Recently Created Portfolios	My Recently Created Portfolios
Portfolio	All Recently Modified Portfolios	Recently Modified Portfolios
Portfolio	All Recently Created Portfolios	Recently Created Portfolios

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
Portfolio	My Recently Modified Portfolios	My Recently Modified Portfolios
Portfolio	PortfolioList	All Portfolio Accounts
Portfolio	PortfoliosRecentlyViewedList	My Recently Viewed Portfolios
Sample Disclaimer	CRMODLS_SIGNDISC.AllList	Sample Disclaimer Lists
Sample Disclaimer	CRMODLS_SIGNDISC.AllRecentlyModified	Recently Modified Sample Disclaimers
Sample Lot	CRMODLS_SampleLot.AllList	Sample Lot Lists
Sample Lot	CRMODLS_SampleLot.AllRecentlyModified	Recently Modified Sample Lots
Sample Transaction	CRMOD_LS_Transactions.AllList	Sample Transaction Lists
Sample Transaction	CRMOD_LS_Transactions.AllRecentlyModified Recently	Modified Sample Transactions
Service Request	MyCurrentServiceRelatedTasks	My Current Service Request Related Tasks
Service Request	AllOpenServiceRelatedTasks	Service Request-Related Tasks
Service Request	HomepageSRLList	Service Request Lists
Service Request	My Open Service Requests Short	My Open Service Requests
Service Request	MyOpenServiceRelatedTasks	My Open Service Request Related Tasks
Service Request	Open Service Request Analysis Report	Open Service Request Analysis
Solution	MyRecentlyCreatedSolutions	My Recently Created Solutions
Solution	All Recently Modified Solutions	Recently Modified Solutions
Solution	All Recently Created Solutions	Recently Created Solutions
Solution	MyRecentlyModifiedSolutions	My Recently Modified Solutions
Solution	SolutionList	All Solutions
Solution	SolutionsRecentlyViewedList	My Recently Viewed Solutions
Solution	Most Active Solutions	Most Active Solutions
Solution	Highest Rated Solutions	Highest Rated Solutions
SPRequest	SPRequest.PendingMyApproval	Special Pricing Requests Pending My Approval
SPRequest	SPRequest.MyApproved	My Approved Special Pricing Requests

Table 63. Homepage Layout Mapping for Oracle CRM On Demand Objects

Object Name	Layout Name	Display Name
SPRequest	SPRequest.AllPending	All Pending Special Pricing Requests
SPRequest	SPRequest.MyRecentlyModified	My Recently Modified Special Pricing Requests
SPRequest	SPRequest.MyRecentlyCreated	My Recently Created Special Pricing Requests
SPRequest	SPRequest.AllRecentlyCreated	Recently Created Special Pricing Requests
SPRequest	SPRequest.AllList	All Special Pricing Requests
SPRequest	SPRequest.AllRecentlyModified	Recently Modified Special Pricing Requests
SPRequest	SPRequest.MyPending	My Pending Special Pricing Requests
Vehicle	My Recently Created Vehicles	My Recently Created Vehicles
Vehicle	All Recently Modified Vehicles	Recently Modified Vehicles
Vehicle	All Recently Created Vehicles	Recently Created Vehicles
Vehicle	My Recently Modified Vehicles	My Recently Modified Vehicles
Vehicle	VehicleList	All Vehicles
Vehicle	VehiclesRecentlyViewedList	My Recently Viewed Vehicles
Vehicle	VehicleHomepageSRList	Vehicle-Related Service Requests

Privilege IDs and Their Corresponding Names and Descriptions

Table 64 maps the privilege IDs, and their corresponding privilege names, privilege categories, and privilege descriptions.

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
ACCESS_ATT_EXPORT	Access all Export Request Attachments	Data Management: Export	Access attachments for all requests in the Export Queue.
ACCESS_ATT_IMPORT	Access all Import Request Attachments	Data Management: Import	Access attachments for all requests in the Import Queue.

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
ACCESS_OFFLINESYNC	Enable Offline Access	Desktop/Mobile	Download the Offline client and synchronize data with On Demand.
ADMIN_ACTIONBAR_PERSONALIZATION	Personalize Action Bar	My Setup	Access to Action bar personalization.
ADMIN_ADVANCED_FIELD_MGMT	Advanced Field Management	Customization: Data	Set up advanced field management features such as advanced default values and custom field validation rules.
ADMIN_BATCH_DELETE	Batch Delete	Data Management	Delete lists of Accounts, Contacts, Opportunities, Leads, Service Requests, and Activities in a batch.
ADMIN_CHILD_DISPLAY	Personalize Related Information Display Format	My Setup	User can choose the related information display format between tabs or lists.
ADMIN_COMP_PROFILE	Manage Company	Admin: Company Administration	Manage company profile, set security policies, activate languages, define fiscal calendars and create Homepage alerts.
ADMIN_CONT_MGMT	Manage Content	Admin: Content Management	Manage content areas such as Products and Analytics report folders.
ADMIN_DETAILPAGE_PERSONALIZATION	Personalize Detail Page	My Setup	Access to detail page personalization.
ADMIN_DYNAMIC_LAYOUT	Customize Application - Manage Dynamic Layouts	Customization: Layout	Define Dynamic Layouts and assign the layouts to roles.
ADMIN_EXPORT	Admin Export	Data Management: Export	Exports all types of data.

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
ADMIN_FIELD_AUDIT	Administer Field Audit	Customization: Data	Add, edit or remove fields from the list of Audited fields for supported objects.
ADMIN_HOMEPAGE_CUSTOMIZATION	Customize Application - Manage Homepage Customization	Customization: Layout	Create and manage custom homepages and assign the homepages to roles.
ADMIN_HOMEPAGE_PERSONALIZATION	Personalize Homepages	My Setup	Access to homepage personalization.
ADMIN_IMPORT	Admin Import	Data Management: Import	Import all types of data.
ADMIN_MASS_UPDATE	Mass Update	Data Management	Update values across multiple records for Accounts, Contacts, Opportunities, Leads, Service Requests, and Activities.
ADMIN_MERGE_RECORDS	Merge Records	Data Management	Merge duplicate records into single master record.
ADMIN_PERSONAL_EXTRACT	Manage Personal Extract	Data Management: Export	Manage and generate personal extracts for offline clients.
ADMIN_SHARED_ADDRS	Manage Shared Addresses	CRM	Manage Shared Addresses
ADMIN_TAB_PERSONALIZATION	Personalize Tabs	My Setup	Access to tab personalization.
ADMIN_TERRITORY	Manage Territories	Admin: Users and Access Controls	Manage Territories and Territory Hierarchy.
ADMIN_USERS_ROLES	Manage Users and Access	Admin: Users and Access Controls	Manage Users and establish User Quotas. Define Access Profiles, Roles and Groups to manage data access controls.

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
ADMIN_WORKFLOW	Manage Data Rules - Manage Workflow Rules	Customization: Business Rules	Define and manage workflow rules
ANALYTICS_PERS_RPTS	Manage Personal Reports	Analytics	Manage Analytics Personal Reports
ANALYTICS_SCRIPTING	Analytics Scripting	Analytics	Create Analytics Reports with views and data formats that can contain HTML or JavaScript.
ARCHIVE_LEADS	Archive Leads	CRM: Marketing	Archive Leads that are no longer worth pursuing.
AUDIT_IMPORT	Manage Record Auditing for Imports	Data Management: Import	Manage the ability to set up or disable record auditing during an import request.
CHANGE_OWN_PASSWORD	Reset Personal Password	My Setup	Allow users to change their current password to a new password.
CLIENT_SIDE_EXT_UPLOAD	Upload Client Side Extensions	Customization	Ability to upload custom extensions to CRM On Demand.
CONVERT_LEADS	Convert Leads	CRM: Marketing	Convert Leads to Accounts, Contacts, and Opportunities.
CREATE_CUSTOM_REPORTS	Manage Custom Reports	Analytics	Create, save, and publish customized Analytics charts and reports.
CUSTOMIZE_APP	Customize Application	Customization	Create custom page layouts, homepage layouts, change field names, modify field picklists, define cascading picklists, create custom fields and rename objects.

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
DEFINE_ASSIGN_RULES	Data Rules and Assignment	Customization: Business Rules	Define routing rules for Leads, Accounts, Opportunities and Service Requests. Administer Forecasts, Lead Conversion Mapping and Lead Conversion Layouts, and set up Industry picklist values.
DEFINE_CURRENCIES	Manage Company - Define Currencies	Admin: Company Administration	Manage currencies and exchange rates.
DEFINE_PUBLIC_LISTS	Manage Public Lists	Data Management	Create, Edit and Delete Public Lists.
DEFINE_SALES_PROCESS	Manage Data Rules - Manage Sales Stage Definition	Customization: Business Rules	Define Sales Methodologies and company-specific Sales Processes.
DELETE_ANY_ACTIVITY	Delete Any Activity	Data Management	Delete any Activity regardless of record state, privacy, or relationship.
EXPOSE_ALL_FIELDS	All fields in Search and Lists	Customization: Layout	Expose all fields in Advanced Search and Lists. This includes fields that are not displayed in the Detail Page.
FULL_ACCESS_ANALYTICS	Access All Data in Analytics	Analytics	Access all data in Analytics charts and reports.
FULL_ACCESS_FORECASTS	Access All Forecasts	CRM: Sales	Manage forecast frequency and participants, and access all Forecasts.
GRANT_ASSESSMENTS	Manage Assessments Access	CRM	Manage access to Assessments.
GRANT_BUSNPLAN	Manage Business Planning Access	CRM: Sales	Manage access to Account Planning

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
GRANT_CUSTOM_OBJ1	Customize Application - Manage Custom Object	Customization: Data	Manage access to Custom Object.
GRANT_CUSTOM_OBJ2	Customize Application - Manage Custom Object 2	Customization: Data	Manage access to Custom Object 2.
GRANT_CUSTOM_OBJ3	Customize Application - Manage Custom Object 3	Customization: Data	Manage access to Custom Object 3.
GRANT_PORTFOLIOS	Manage Portfolios Access	Industry Specific: Financial Services	Manage access to Portfolios.
GRANT_REFERRALS	Manage Referrals	CRM: Sales	Manage access to Referrals.
GRANT_WEB_SERVICES_INT	Manage Access to Web Services	Integration: Web Services	Manage access to Enable Web Services Access privilege.
LIST_EXPORT	List - Export Displayed Fields	Data Management: Export	Export fields displayed on a list.
LIST_EXPORT_ALL_FIELDS	List - Export All Fields	Data Management: Export	Export all fields for a Record Type. This includes fields that are not displayed in the List.
MANAGE_ATTACHMENTS	Manage Content - Manage Attachments	Admin: Content Management	Manage all Attachments.
MANAGE_BOOKS	Manage Books	Admin: Users and Access Controls	Manage Book access, bulk assign data to Books and define Book related workflows.
MANAGE_CAMPAIGNS	Manage Campaigns	CRM: Marketing	Create and edit Campaigns.
MANAGE_CUSTOM_WEB_APPLETS	Manage Custom Web Applets	Integration: Widgets	Create, edit and publish custom web applets.
MANAGE_DASHBOARDS	Manage Dashboards	Analytics	Create, manage and design custom dashboards

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
MANAGE_DELEGATES	Manage Users and Access - Manage Delegated Users	Admin: Users and Access Controls	Manage delegation of a user's data visibility and access rights to other users.
MANAGE_THEMES	Manage Themes	Admin: Company Administration	Create and manage Themes
MANAGE_UAN_QUEUE	Enable Integration Event Access	Integration: Integration Event	Enable the ability to get and delete events from Integration Event queue(s) using Web services
MARKETING_IMPORT	Marketing Import	Data Management: Import	Import Leads, Accounts, Contacts, Products and Assets.
MASTER_AUDIT_TABLE	Access Master Audit Trail and Admin Configuration Audit	Admin: Company Administration	Ability to access the Master Audit Trail that displays all auditable data changes across the application and Admin Configuration Audit that displays changes that users have made to various admin configurations.
OEI_NEI	Outlook/Notes Email Integration	Desktop/Mobile	Link emails to Account, Contact, Lead, Opportunity, or Service Request records.
PARTNER_OFFERINGS	Partner Offerings	CRM: Marketing	Display recommended partners within CRM On Demand under My Setup
PARTNER_TRIAL_OFFERINGS	Partner Trial Offerings	CRM: Marketing	Display recommended Partners in the Action Bar (English Only).
PERSONAL_EXPORT	Personal Export	Data Management: Export	Export data to which the role has read access.

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
PERSONAL_IMPORT	Personal Import	My Setup	Import your Contacts
PIM_SYNC_USER	Enable PIM Sync Access	Desktop/Mobile	Download the PIM Sync client and synchronize data with On Demand.
PRODUCER_WIDGETS	Embed CRM On Demand Widgets	Integration: Widgets	Access CRM On Demand content outside of the CRM On Demand application.
PUBLISH_SOLUTIONS	Publish Solutions	CRM	Approve and edit Solutions.
QUALIFY_LEADS	Qualify Leads	CRM: Marketing	Classify Leads as being Qualified.
RECOVER_ALL_RECORDS	Recover All Records	Data Management	Recover Deleted Items discarded by any user.
REJECT_LEADS	Reject Leads	CRM: Marketing	Reject previously Qualified Leads.
RESET_ORG_PASSWORD	Manage Company - Reset All Passwords	Admin: Company Administration	Reset passwords of all users of your company.
SHARED_CALENDAR	Share Calendar	CRM	Share calendars with other users in the company.
TAB_ANALYTICS	Access Analytics Dashboards	Analytics	Access the Analytics Dashboard.
TAB_REPORTS	Access Analytics Reports	Analytics	Access the Analytics Reports tab.
USAGE_TRACKING	Usage Tracking	Analytics	Access the Usage Tracking subject area.
VALIDATE_SHARED_ADDRS	Validate Shared Addresses	CRM	Mark Shared Addresses as validated
VIEW_PREBUILT_REPORTS	Access Analytics Reports - View Prebuilt Analyses	Analytics	View and execute prebuilt analyses and reports.

Table 64. Privilege IDs and Their Corresponding Names and Descriptions

Privilege Id	Privilege Name	Privilege Category	Privilege Description
WEB_SERVICES_INT	Enable Web Services Access	Integration: Web Services	Enable the ability to send Web services requests.
WORKFLOW_CANCEL_SAVE	Workflow Cancel Save	Customization: Business Rules	Prevent save operation on "Before Modified Record Saved".

Child Applet IDs and Their Corresponding Names

Table 65 displays the mapping of child applet IDs to their corresponding names in Page Layout XML for Oracle CRM On Demand records.

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Account	AccountBookChildList	Books
Account	AccountCallChildList	Calls
Account	AccountCompetitorChildList	Account Competitors
Account	AccountFAChildList	Attachments
Account	AccountNoteChildList	Notes
Account	AccountPartnerChildList	Account Partners
Account	AccountPortfolioChildList	Portfolios
Account	AccountRelationshipChildList	Account Relationships
Account	AccountSurveyChildList	Account Survey
Account	AccountTeamChildList	Account Team
Account	ActivityClosedChildList	Completed Activities
Account	ActivityOpenChildList	Open Activities
Account	AddressChildList	Addresses
Account	AssetChildList	Assets
Account	Audit Trail.ChildList	Audit Trail
Account	Claim.ChildList	Claims
Account	ContactPersonChildList	Contacts

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Account	CRMODLS_BPL_ACNT.ChildList	Plan Account
Account	CRMODLS_BusinessPlan.ChildList	Business Plan
Account	CRMODLS_OBJECTIVE.ChildList	Objective
Account	CustObj1ChildList	Custom Objects 01
Account	CustObj2ChildList	Custom Objects 02
Account	CustObj3ChildList	Custom Objects 03
Account	CustomObject10.ChildList	Custom Objects 10
Account	CustomObject11.ChildList	Custom Objects 11
Account	CustomObject12.ChildList	Custom Objects 12
Account	CustomObject13.ChildList	Custom Objects 13
Account	CustomObject14.ChildList	Custom Objects 14
Account	CustomObject15.ChildList	Custom Objects 15
Account	CustomObject4.ChildList	Custom Objects 04
Account	CustomObject5.ChildList	Custom Objects 05
Account	CustomObject6.ChildList	Custom Objects 06
Account	CustomObject7.ChildList	Custom Objects 07
Account	CustomObject8.ChildList	Custom Objects 08
Account	CustomObject9.ChildList	Custom Objects 09
Account	DealerVehicleChildList	Vehicles
Account	DealRegistration.ChildList	Deal Registrations
Account	FinancialAccount.Branch.ChildList	Financial Accounts
Account	FinancialAccount.ChildList	Financial Accounts
Account	FinancialAccount.Held_Away_Institution.ChildList	Financial Accounts
Account	FinancialAccountHolder.ChildList	Financial Account Holders
Account	FinancialPlan.ChildList	Financial Plans
Account	LeadChildList	Leads
Account	OptyChildList	Opportunities
Account	Order.ChildList	Orders
Account	Policy.ChildList	Policies
Account	PolicyHolder.ChildList	Policy Holders

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Account	Quote.ChildList	Quotes
Account	RevenueChildList	Revenues
Account	SPRequest.ChildList	Special Pricing Requests
Account	SRChildList	Service Requests
Account	SubAccountChildList	Sub-Accounts
AccountCall	ActionContactChildList	Contacts
AccountCall	ActionFACHildList	Attachments
AccountCall	ActionUserChildList	Users
AccountCall	Activity Book.ChildList	Books
AccountCall	ActivityAssessmentChildList	Activity Assessments
AccountCall	AttendeeCallChildList	Attendee Calls
AccountCall	Audit Trail.ChildList	Audit Trail
AccountCall	CallsMessagePlanVBCChildList	Available Message Plans
AccountCall	CallsProdDetailChildList	Products Detailed
AccountCall	CallsProdDetailVBCChildList	Available Products for Detailing
AccountCall	CallsPromItemDropChildList	Promotional Items
AccountCall	CallsPromItemDropVBCChildList	Available Promotional Items for Drop
AccountCall	CallsSampDropChildList	Samples Dropped
AccountCall	CallsSampDropVBCChildList	Available Samples for Drop
AccountCall	CRMOD_LS_Transactions.ChildList	Sample Transactions
AccountCall	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
AccountCall	CRMODLS_Signature.ChildList	Signature
AccountCall	CustomObject10.ChildList	Custom Objects 10
AccountCall	CustomObject11.ChildList	Custom Objects 11
AccountCall	CustomObject12.ChildList	Custom Objects 12
AccountCall	CustomObject13.ChildList	Custom Objects 13
AccountCall	CustomObject14.ChildList	Custom Objects 14
AccountCall	CustomObject15.ChildList	Custom Objects 15
AccountCall	CustomObject4.ChildList	Custom Objects 04

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
AccountCall	CustomObject5.ChildList	Custom Objects 05
AccountCall	CustomObject6.ChildList	Custom Objects 06
AccountCall	CustomObject7.ChildList	Custom Objects 07
AccountCall	CustomObject8.ChildList	Custom Objects 08
AccountCall	CustomObject9.ChildList	Custom Objects 09
AccountCall	Fund Request.ChildList	Fund Requests
AccountCall	MedEdSolutionChildList	Solutions
AccountCall	Order.ChildList	Orders
Accreditation	Accreditation Book.ChildList	Books
Accreditation	AccreditationAttachment.ChildList	Accreditation Attachments
Accreditation	AccreditationCertification.ChildList	Accreditation Certifications
Accreditation	AccreditationProduct.ChildList	Accreditation Products
Accreditation	AccreditationProductCategory.ChildList	Accreditation Product Categories
Accreditation	AccreditationRelationship.ChildList	Related Accreditations
Accreditation	AccreditationRequest.ChildList	Accreditation Requests
Accreditation	AccreditationSolution.ChildList	Accreditation Solutions
Accreditation	AccreditationTeam.ChildList	Accreditation Team
Accreditation	Custom Object 1.ChildList	Custom Objects 01
Accreditation	Custom Object 2.ChildList	Custom Objects 02
Accreditation	Custom Object 3.ChildList	Custom Objects 03
Accreditation	CustomObject10.ChildList	Custom Objects 10
Accreditation	CustomObject11.ChildList	Custom Objects 11
Accreditation	CustomObject12.ChildList	Custom Objects 12
Accreditation	CustomObject13.ChildList	Custom Objects 13
Accreditation	CustomObject14.ChildList	Custom Objects 14
Accreditation	CustomObject15.ChildList	Custom Objects 15
Accreditation	CustomObject4.ChildList	Custom Objects 04
Accreditation	CustomObject5.ChildList	Custom Objects 05
Accreditation	CustomObject6.ChildList	Custom Objects 06
Accreditation	CustomObject7.ChildList	Custom Objects 07

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Accreditation	CustomObject8.ChildList	Custom Objects 08
Accreditation	CustomObject9.ChildList	Custom Objects 09
Application	Activity.ChildList	Activities
Application	Application Book.ChildList	Books
Application	ApplicationAttachment.ChildList	Application Attachments
Application	ApplicationTeam.ChildList	Application Team
Application	Audit Trail.ChildList	Audit Trail
Appointment	ActionContactChildList	Contacts
Appointment	ActionFACHildList	Attachments
Appointment	ActionUserChildList	Users
Appointment	ActivityAssessmentChildList	Activity Assessments
Appointment	ActivityBookChildList	Books
Appointment	Audit Trail.ChildList	Audit Trail
Appointment	CRMOD_LS_Transactions.ChildList	Sample Transactions
Appointment	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Appointment	CRMODLS_Signature.ChildList	Signature
Appointment	CustObj1ChildList	Custom Objects 01
Appointment	CustObj2ChildList	Custom Objects 02
Appointment	CustObj3ChildList	Custom Objects 03
Appointment	CustomObject10.ChildList	Custom Objects 10
Appointment	CustomObject11.ChildList	Custom Objects 11
Appointment	CustomObject12.ChildList	Custom Objects 12
Appointment	CustomObject13.ChildList	Custom Objects 13
Appointment	CustomObject14.ChildList	Custom Objects 14
Appointment	CustomObject15.ChildList	Custom Objects 15
Appointment	CustomObject4.ChildList	Custom Objects 04
Appointment	CustomObject5.ChildList	Custom Objects 05
Appointment	CustomObject6.ChildList	Custom Objects 06
Appointment	CustomObject7.ChildList	Custom Objects 07
Appointment	CustomObject8.ChildList	Custom Objects 08
Appointment	CustomObject9.ChildList	Custom Objects 09

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Appointment	DirectSend.ChildList	Sample Requests
Appointment	Fund Request.ChildList	Fund Requests
Appointment	MedEdSolutionChildList	Solutions
Appointment	Order.ChildList	Orders
Attendee Call	Activity Book.ChildList	Books
Attendee Call	Audit Trail.ChildList	Audit Trail
Attendee Call	CallsProdDetailChildList	Products Detailed
Attendee Call	CallsProdDetailVBCCChildList	Available Products for Detailing
Attendee Call	CallsPromItemDropChildList	Promotional Items
Attendee Call	CallsPromItemDropVBCCChildList	Available Promotional Items for Drop
Attendee Call	CallsSampDropChildList	Samples Dropped
Attendee Call	CallsSampDropVBCCChildList	Available Samples for Drop
Attendee Call	CRMOD_LS_Transactions.ChildList	Sample Transactions
Attendee Call	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Attendee Call	CRMODLS_Signature.ChildList	Signature
Attendee Call	CustomObject10.ChildList	Custom Objects 10
Attendee Call	CustomObject11.ChildList	Custom Objects 11
Attendee Call	CustomObject12.ChildList	Custom Objects 12
Attendee Call	CustomObject13.ChildList	Custom Objects 13
Attendee Call	CustomObject14.ChildList	Custom Objects 14
Attendee Call	CustomObject15.ChildList	Custom Objects 15
Attendee Call	CustomObject4.ChildList	Custom Objects 04
Attendee Call	CustomObject5.ChildList	Custom Objects 05
Attendee Call	CustomObject6.ChildList	Custom Objects 06
Attendee Call	CustomObject7.ChildList	Custom Objects 07
Attendee Call	CustomObject8.ChildList	Custom Objects 08
Attendee Call	CustomObject9.ChildList	Custom Objects 09
Attendee Call	Fund Request.ChildList	Fund Requests
Attendee Call	Order.ChildList	Orders

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
BrokerProfile	Custom Object 1.ChildList	Custom Objects 01
BrokerProfile	Custom Object 2.ChildList	Custom Objects 02
BrokerProfile	Custom Object 3.ChildList	Custom Objects 03
BrokerProfile	CustomObject10.ChildList	Custom Objects 10
BrokerProfile	CustomObject11.ChildList	Custom Objects 11
BrokerProfile	CustomObject12.ChildList	Custom Objects 12
BrokerProfile	CustomObject13.ChildList	Custom Objects 13
BrokerProfile	CustomObject14.ChildList	Custom Objects 14
BrokerProfile	CustomObject15.ChildList	Custom Objects 15
BrokerProfile	CustomObject4.ChildList	Custom Objects 04
BrokerProfile	CustomObject5.ChildList	Custom Objects 05
BrokerProfile	CustomObject6.ChildList	Custom Objects 06
BrokerProfile	CustomObject7.ChildList	Custom Objects 07
BrokerProfile	CustomObject8.ChildList	Custom Objects 08
BrokerProfile	CustomObject9.ChildList	Custom Objects 09
Campaign	ActivityClosedChildList	Completed Activities
Campaign	ActivityOpenChildList	Open Activities
Campaign	Application.ChildList	Applications
Campaign	Campaign Book.ChildList	Books
Campaign	CampaignContChildList	Recipients
Campaign	CampaignFACChildList	Attachments
Campaign	CampaignNoteChildList	Notes
Campaign	CustObj1ChildList	Custom Objects 01
Campaign	CustObj2ChildList	Custom Objects 02
Campaign	CustObj3ChildList	Custom Objects 03
Campaign	CustomObject10.ChildList	Custom Objects 10
Campaign	CustomObject11.ChildList	Custom Objects 11
Campaign	CustomObject12.ChildList	Custom Objects 12
Campaign	CustomObject13.ChildList	Custom Objects 13
Campaign	CustomObject14.ChildList	Custom Objects 14
Campaign	CustomObject15.ChildList	Custom Objects 15

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Campaign	CustomObject4.ChildList	Custom Objects 04
Campaign	CustomObject5.ChildList	Custom Objects 05
Campaign	CustomObject6.ChildList	Custom Objects 06
Campaign	CustomObject7.ChildList	Custom Objects 07
Campaign	CustomObject8.ChildList	Custom Objects 08
Campaign	CustomObject9.ChildList	Custom Objects 09
Campaign	FinancialAccount.ChildList	Financial Accounts
Campaign	FinancialPlan.ChildList	Financial Plans
Campaign	LeadChildList	Leads
Campaign	MDFRequest.ChildList	MDF Requests
Campaign	MedEdEvent.ChildList	MedEd Events
Campaign	OptyChildList	Opportunities
Campaign	PartnerCampaign.ChildList	Partner Campaigns
Campaign	Policy.ChildList	Policies
Certification	AccreditationCertification.ChildList	Accreditation Certifications
Certification	Certification Book.ChildList	Books
Certification	CertificationAttachment.ChildList	Certification Attachments
Certification	CertificationCourse.ChildList	Certification Courses
Certification	CertificationExam.ChildList	Certification Exams
Certification	CertificationProduct.ChildList	Certification Products
Certification	CertificationProductCategory.ChildList	Certification Product Categories
Certification	CertificationRelationship.ChildList	Related Certifications
Certification	CertificationRequest.ChildList	Certification Requests
Certification	CertificationSolution.ChildList	Certification Solutions
Certification	CertificationTeam.ChildList	Certification Team
Certification	Custom Object 1.ChildList	Custom Objects 01
Certification	Custom Object 2.ChildList	Custom Objects 02
Certification	Custom Object 3.ChildList	Custom Objects 03
Certification	CustomObject10.ChildList	Custom Objects 10
Certification	CustomObject11.ChildList	Custom Objects 11

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Certification	CustomObject12.ChildList	Custom Objects 12
Certification	CustomObject13.ChildList	Custom Objects 13
Certification	CustomObject14.ChildList	Custom Objects 14
Certification	CustomObject15.ChildList	Custom Objects 15
Certification	CustomObject4.ChildList	Custom Objects 04
Certification	CustomObject5.ChildList	Custom Objects 05
Certification	CustomObject6.ChildList	Custom Objects 06
Certification	CustomObject7.ChildList	Custom Objects 07
Certification	CustomObject8.ChildList	Custom Objects 08
Certification	CustomObject9.ChildList	Custom Objects 09
Channel Partner	ActivityClosedChildList	Completed Activities
Channel Partner	ActivityOpenChildList	Open Activities
Channel Partner	ChannelPartnerTerritoryChildList	Territory
Channel Partner	CustObj1ChildList	Custom Objects 01
Channel Partner	CustObj2ChildList	Custom Objects 02
Channel Partner	CustObj3ChildList	Custom Objects 03
Channel Partner	CustomObject10.ChildList	Custom Objects 10
Channel Partner	CustomObject11.ChildList	Custom Objects 11
Channel Partner	CustomObject12.ChildList	Custom Objects 12
Channel Partner	CustomObject13.ChildList	Custom Objects 13
Channel Partner	CustomObject14.ChildList	Custom Objects 14
Channel Partner	CustomObject15.ChildList	Custom Objects 15
Channel Partner	CustomObject4.ChildList	Custom Objects 04
Channel Partner	CustomObject5.ChildList	Custom Objects 05
Channel Partner	CustomObject6.ChildList	Custom Objects 06
Channel Partner	CustomObject7.ChildList	Custom Objects 07
Channel Partner	CustomObject8.ChildList	Custom Objects 08
Channel Partner	CustomObject9.ChildList	Custom Objects 09
Channel Partner	DealerAddress.ChildList	Addresses
Channel Partner	DealerBookChildList	Books
Channel Partner	DealerContactChildList	Contacts

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Channel Partner	DealerFACHildList	Attachments
Channel Partner	DealerNoteChildList	Notes
Channel Partner	DealerSalesHoursChildList	Sales Hours
Channel Partner	DealerSalesServiceMakeList	Makes
Channel Partner	DealerServiceHoursChildList	Service Hours
Channel Partner	DealerVehicleChildList	Vehicles
Channel Partner	OptyNoDelChildList	Opportunities
Channel Partner	SRChildList	Service Requests
Claim	Activity.ChildList	Activities
Claim	Damage.ChildList	Damages
Claim	InvolvedParty.ChildList	Involved Parties
Claim	Service Request.ChildList	Service Requests
CODActEmailDetail	Activity Book.ChildList	Books
CODActEmailDetail	Audit Trail.ChildList	Audit Trail
CODActEmailDetail	CODActEmailFACHildList	Attachments
CODActEmailDetail	CODContactChildList	Contacts
CODActEmailDetail	CRMOD_LS_Transactions.ChildList	Sample Transactions
CODActEmailDetail	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODActEmailDetail	CRMODLS_Signature.ChildList	Signature
CODActEmailDetail	CustomObject10.ChildList	Custom Objects 10
CODActEmailDetail	CustomObject11.ChildList	Custom Objects 11
CODActEmailDetail	CustomObject12.ChildList	Custom Objects 12
CODActEmailDetail	CustomObject13.ChildList	Custom Objects 13
CODActEmailDetail	CustomObject14.ChildList	Custom Objects 14
CODActEmailDetail	CustomObject15.ChildList	Custom Objects 15
CODActEmailDetail	CustomObject4.ChildList	Custom Objects 04
CODActEmailDetail	CustomObject5.ChildList	Custom Objects 05
CODActEmailDetail	CustomObject6.ChildList	Custom Objects 06
CODActEmailDetail	CustomObject7.ChildList	Custom Objects 07
CODActEmailDetail	CustomObject8.ChildList	Custom Objects 08
CODActEmailDetail	CustomObject9.ChildList	Custom Objects 09

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CODActEmailDetail	Fund Request.ChildList	Fund Requests
CODActEmailDetail	Order.ChildList	Orders
CODActVMDetail	Activity Book.ChildList	Books
CODActVMDetail	Audit Trail.ChildList	Audit Trail
CODActVMDetail	CODActVMFACHildList	Attachments
CODActVMDetail	CODContactChildList	Contacts
CODActVMDetail	CRMOD_LS_Transactions.ChildList	Sample Transactions
CODActVMDetail	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODActVMDetail	CRMODLS_Signature.ChildList	Signature
CODActVMDetail	CustomObject10.ChildList	Custom Objects 10
CODActVMDetail	CustomObject11.ChildList	Custom Objects 11
CODActVMDetail	CustomObject12.ChildList	Custom Objects 12
CODActVMDetail	CustomObject13.ChildList	Custom Objects 13
CODActVMDetail	CustomObject14.ChildList	Custom Objects 14
CODActVMDetail	CustomObject15.ChildList	Custom Objects 15
CODActVMDetail	CustomObject4.ChildList	Custom Objects 04
CODActVMDetail	CustomObject5.ChildList	Custom Objects 05
CODActVMDetail	CustomObject6.ChildList	Custom Objects 06
CODActVMDetail	CustomObject7.ChildList	Custom Objects 07
CODActVMDetail	CustomObject8.ChildList	Custom Objects 08
CODActVMDetail	CustomObject9.ChildList	Custom Objects 09
CODActVMDetail	Fund Request.ChildList	Fund Requests
CODActVMDetail	Order.ChildList	Orders
CODActVoiceDetail	Activity Book.ChildList	Books
CODActVoiceDetail	Audit Trail.ChildList	Audit Trail
CODActVoiceDetail	CODActVoiceFACHildList	Attachments
CODActVoiceDetail	CODContactChildList	Contacts
CODActVoiceDetail	CRMOD_LS_Transactions.ChildList	Sample Transactions
CODActVoiceDetail	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODActVoiceDetail	CRMODLS_Signature.ChildList	Signature
CODActVoiceDetail	CustomObject10.ChildList	Custom Objects 10

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CODActVoiceDetail	CustomObject11.ChildList	Custom Objects 11
CODActVoiceDetail	CustomObject12.ChildList	Custom Objects 12
CODActVoiceDetail	CustomObject13.ChildList	Custom Objects 13
CODActVoiceDetail	CustomObject14.ChildList	Custom Objects 14
CODActVoiceDetail	CustomObject15.ChildList	Custom Objects 15
CODActVoiceDetail	CustomObject4.ChildList	Custom Objects 04
CODActVoiceDetail	CustomObject5.ChildList	Custom Objects 05
CODActVoiceDetail	CustomObject6.ChildList	Custom Objects 06
CODActVoiceDetail	CustomObject7.ChildList	Custom Objects 07
CODActVoiceDetail	CustomObject8.ChildList	Custom Objects 08
CODActVoiceDetail	CustomObject9.ChildList	Custom Objects 09
CODActVoiceDetail	Fund Request.ChildList	Fund Requests
CODActVoiceDetail	Order.ChildList	Orders
CODWrapUp	Activity Book.ChildList	Books
CODWrapUp	Audit Trail.ChildList	Audit Trail
CODWrapUp	CRMOD_LS_Transactions.ChildList	Sample Transactions
CODWrapUp	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODWrapUp	CRMODLS_Signature.ChildList	Signature
CODWrapUp	CustomObject10.ChildList	Custom Objects 10
CODWrapUp	CustomObject11.ChildList	Custom Objects 11
CODWrapUp	CustomObject12.ChildList	Custom Objects 12
CODWrapUp	CustomObject13.ChildList	Custom Objects 13
CODWrapUp	CustomObject14.ChildList	Custom Objects 14
CODWrapUp	CustomObject15.ChildList	Custom Objects 15
CODWrapUp	CustomObject4.ChildList	Custom Objects 04
CODWrapUp	CustomObject5.ChildList	Custom Objects 05
CODWrapUp	CustomObject6.ChildList	Custom Objects 06
CODWrapUp	CustomObject7.ChildList	Custom Objects 07
CODWrapUp	CustomObject8.ChildList	Custom Objects 08
CODWrapUp	CustomObject9.ChildList	Custom Objects 09
CODWrapUp	DirectSend.ChildList	Sample Requests

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CODWrapUp	Fund Request.ChildList	Fund Requests
CODWrapUp	Order.ChildList	Orders
Contact	Accreditation.ChildList	Accreditations
Contact	ActivityClosedChildList	Completed Activities
Contact	ActivityOpenChildList	Open Activities
Contact	Audit Trail.ChildList	Audit Trail
Contact	Certification.ChildList	Certifications
Contact	CertificationRequest.ChildList	Certification Requests
Contact	Claim.ChildList	Claims
Contact	ContactAccountChildList	Accounts
Contact	ContactAddressChildList	Addresses
Contact	ContactAssetChild	Assets
Contact	ContactBestTimes.ChildList	Contact Best Times
Contact	ContactBookChildList	Books
Contact	ContactCallChildList	Calls
Contact	ContactCampChildList	Campaigns
Contact	ContactCustSatSurveyChildList	Customer Satisfaction Surveys
Contact	ContactFACChildList	Attachments
Contact	ContactHouseholdChildList	Household
Contact	ContactInterestChildList	Contact Interests
Contact	ContactNoteChildList	Notes
Contact	ContactPortfolioChildList	Portfolio
Contact	ContactRelationshipList	Contact Relationships
Contact	ContactTeamChildList	Contact Team
Contact	Course.ChildList	Courses
Contact	CourseEnrollment.ChildList	Course Enrollments
Contact	Coverage.ChildList	Coverages
Contact	CRMOD_LS_ContactLicenses.ChildList	Contact State Licenses
Contact	CRMOD_LS_Transactions.ChildList	Sample Transactions
Contact	CRMODLS_BPL_CNTCT.ChildList	Plan Contact

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Contact	CRMODLS_OBJECTIVE.ChildList	Objective
Contact	CRMODLS_Signature.ChildList	Signature
Contact	CustObj1ChildList	Custom Objects 01
Contact	CustObj2ChildList	Custom Objects 02
Contact	CustObj3ChildList	Custom Objects 03
Contact	CustomObject10.ChildList	Custom Objects 10
Contact	CustomObject11.ChildList	Custom Objects 11
Contact	CustomObject12.ChildList	Custom Objects 12
Contact	CustomObject13.ChildList	Custom Objects 13
Contact	CustomObject14.ChildList	Custom Objects 14
Contact	CustomObject15.ChildList	Custom Objects 15
Contact	CustomObject4.ChildList	Custom Objects 04
Contact	CustomObject5.ChildList	Custom Objects 05
Contact	CustomObject6.ChildList	Custom Objects 06
Contact	CustomObject7.ChildList	Custom Objects 07
Contact	CustomObject8.ChildList	Custom Objects 08
Contact	CustomObject9.ChildList	Custom Objects 09
Contact	DealerVehicleChildList	Vehicles
Contact	DealRegistration.ChildList	Deal Registrations
Contact	Exam.ChildList	Exams
Contact	ExamRegistration.ChildList	Exam Registrations
Contact	FinancialAccount.Account_Holder.ChildList	Financial Accounts
Contact	FinancialAccount.ChildList	Financial Accounts
Contact	FinancialAccountHolder.ChildList	Financial Account Holders
Contact	FinancialPlan.ChildList	Financial Plans
Contact	InvolvedParty.ChildList	Involved Parties
Contact	LeadChildList	Leads
Contact	MedEdChildList	MedEd Event
Contact	OptyContactChildList	Opportunities
Contact	Order.ChildList	Orders

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Contact	Policy.Carrier_Underwriter.ChildList	Policies
Contact	Policy.ChildList	Policies
Contact	PolicyHolder.ChildList	Policy Holders
Contact	ReferralChildList	Referrals
Contact	RevenueChildList	Revenues
Contact	SRChildList	Service Requests
Contact Call	ActionContactChildList	Contacts
Contact Call	ActionFACChildList	Attachments
Contact Call	ActionUserChildList	Users
Contact Call	Activity Book.ChildList	Books
Contact Call	ActivityAssessmentChildList	Activity Assessments
Contact Call	Audit Trail.ChildList	Audit Trail
Contact Call	CallsMessagePlanVBCChildList	Available Message Plans
Contact Call	CallsProdDetailChildList	Products Detailed
Contact Call	CallsProdDetailVBCChildList	Available Products for Detailing
Contact Call	CallsPromItemDropChildList	Promotional Items
Contact Call	CallsPromItemDropVBCChildList	Available Promotional Items for Drop
Contact Call	CallsSampDropChildList	Samples Dropped
Contact Call	CallsSampDropVBCChildList	Available Samples for Drop
Contact Call	CRMOD_LS_Transactions.ChildList	Sample Transactions
Contact Call	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Contact Call	CRMODLS_Signature.ChildList	Signature
Contact Call	CustomObject10.ChildList	Custom Objects 10
Contact Call	CustomObject11.ChildList	Custom Objects 11
Contact Call	CustomObject12.ChildList	Custom Objects 12
Contact Call	CustomObject13.ChildList	Custom Objects 13
Contact Call	CustomObject14.ChildList	Custom Objects 14
Contact Call	CustomObject15.ChildList	Custom Objects 15
Contact Call	CustomObject4.ChildList	Custom Objects 04

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Contact Call	CustomObject5.ChildList	Custom Objects 05
Contact Call	CustomObject6.ChildList	Custom Objects 06
Contact Call	CustomObject7.ChildList	Custom Objects 07
Contact Call	CustomObject8.ChildList	Custom Objects 08
Contact Call	CustomObject9.ChildList	Custom Objects 09
Contact Call	Fund Request.ChildList	Fund Requests
Contact Call	MedEdSolutionChildList	Solutions
Contact Call	Order.ChildList	Orders
Course	CertificationCourse.ChildList	Certification Courses
Course	Course Book.ChildList	Books
Course	CourseAttachment.ChildList	Course Attachments
Course	CourseCategory.ChildList	Course Product Categories
Course	CourseEnrollment.ChildList	Course Enrollments
Course	CourseExam.ChildList	Course Exams
Course	CoursePartner.ChildList	Course Partners
Course	CourseProduct.ChildList	Course Products
Course	CourseRelationship.ChildList	Related Courses
Course	CourseSolution.ChildList	Course Solutions
Course	CourseTeam.ChildList	Course Team
Course	Custom Object 1.ChildList	Custom Objects 01
Course	Custom Object 2.ChildList	Custom Objects 02
Course	Custom Object 3.ChildList	Custom Objects 03
Course	CustomObject10.ChildList	Custom Objects 10
Course	CustomObject11.ChildList	Custom Objects 11
Course	CustomObject12.ChildList	Custom Objects 12
Course	CustomObject13.ChildList	Custom Objects 13
Course	CustomObject14.ChildList	Custom Objects 14
Course	CustomObject15.ChildList	Custom Objects 15
Course	CustomObject4.ChildList	Custom Objects 04
Course	CustomObject5.ChildList	Custom Objects 05
Course	CustomObject6.ChildList	Custom Objects 06

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Course	CustomObject7.ChildList	Custom Objects 07
Course	CustomObject8.ChildList	Custom Objects 08
Course	CustomObject9.ChildList	Custom Objects 09
CRMOD_LS_Allocation	CRMOD_LS_Allocation Book.ChildList	Books
CRMOD_LS_MessagingPlan	CRMOD_LS_MessagingPlan Book.ChildList	Books
CRMOD_LS_MessagingPlan	CRMOD_LS_MsgPlanItem.ChildList	Messaging Plan Items
CRMOD_LS_MessagingPlan	CRMODLS_BusinessPlan.ChildList	Business Plan
CRMOD_LS_MessagingPlan	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CRMOD_LS_MsgPlanItem	CRMOD_LS_MsgPlnRel.ChildList	Messaging Plan Item Relations
CRMOD_LS_MsgPlanItem	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CRMOD_LS_Transactions	CRMOD_LS_TransactionItems.ChildList	Transaction Items
CRMOD_LS_Transactions	CRMOD_LS_Transactions Book.ChildList	Books
CRMOD_LS_Transactions	Custom Object 1.ChildList	Custom Objects 01
CRMOD_LS_Transactions	Custom Object 2.ChildList	Custom Objects 02
CRMOD_LS_Transactions	Custom Object 3.ChildList	Custom Objects 03
CRMOD_LS_Transactions	CustomObject10.ChildList	Custom Objects 10
CRMOD_LS_Transactions	CustomObject11.ChildList	Custom Objects 11
CRMOD_LS_Transactions	CustomObject12.ChildList	Custom Objects 12
CRMOD_LS_Transactions	CustomObject13.ChildList	Custom Objects 13
CRMOD_LS_Transactions	CustomObject14.ChildList	Custom Objects 14
CRMOD_LS_Transactions	CustomObject15.ChildList	Custom Objects 15
CRMOD_LS_Transactions	CustomObject4.ChildList	Custom Objects 04
CRMOD_LS_Transactions	CustomObject5.ChildList	Custom Objects 05
CRMOD_LS_Transactions	CustomObject6.ChildList	Custom Objects 06
CRMOD_LS_Transactions	CustomObject7.ChildList	Custom Objects 07
CRMOD_LS_Transactions	CustomObject8.ChildList	Custom Objects 08
CRMOD_LS_Transactions	CustomObject9.ChildList	Custom Objects 09
CRMODLS_BusinessPlan	AccreditationRequest.ChildList	Accreditation Requests

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CRMODLS_BusinessPlan	Activity.ChildList	Activities
CRMODLS_BusinessPlan	BusinessPlanAssessmentChildList	Business Plan Assessment
CRMODLS_BusinessPlan	CertificationRequest.ChildList	Certification Requests
CRMODLS_BusinessPlan	CRMOD_LS_MessagingPlan.ChildList	Messaging Plans
CRMODLS_BusinessPlan	CRMODLS_BPL_ACNT.ChildList	Plan Account
CRMODLS_BusinessPlan	CRMODLS_BPL_CNTCT.ChildList	Plan Contact
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan Book.ChildList	Books
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan.SelfChildList	Business Plan
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan_ ATTACHMENT.ChildList	Business Plan Attachments
CRMODLS_BusinessPlan	CRMODLS_BusinessPlanTeam. ChildList	Business Plan Team
CRMODLS_BusinessPlan	CRMODLS_OBJECTIVE.ChildList	Objective
CRMODLS_BusinessPlan	CRMODLS_PlanOpportunities.ChildList	Plan Opportunity
CRMODLS_BusinessPlan	Custom Object 1.ChildList	Custom Objects 01
CRMODLS_BusinessPlan	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_BusinessPlan	Custom Object 3.ChildList	Custom Objects 03
CRMODLS_BusinessPlan	CustomObject10.ChildList	Custom Objects 10
CRMODLS_BusinessPlan	CustomObject11.ChildList	Custom Objects 11
CRMODLS_BusinessPlan	CustomObject12.ChildList	Custom Objects 12
CRMODLS_BusinessPlan	CustomObject13.ChildList	Custom Objects 13
CRMODLS_BusinessPlan	CustomObject14.ChildList	Custom Objects 14
CRMODLS_BusinessPlan	CustomObject15.ChildList	Custom Objects 15
CRMODLS_BusinessPlan	CustomObject4.ChildList	Custom Objects 04
CRMODLS_BusinessPlan	CustomObject5.ChildList	Custom Objects 05
CRMODLS_BusinessPlan	CustomObject6.ChildList	Custom Objects 06
CRMODLS_BusinessPlan	CustomObject7.ChildList	Custom Objects 07
CRMODLS_BusinessPlan	CustomObject8.ChildList	Custom Objects 08
CRMODLS_BusinessPlan	CustomObject9.ChildList	Custom Objects 09
CRMODLS_BusinessPlan	MedEdEvent.ChildList	MedEd Events
CRMODLS_BusinessPlan	PartnerPlan.ChildList	Partner Plans

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CRMODLS_InventoryAuditReport	CRMODLS_InventoryAuditReport Book.ChildList	Books
CRMODLS_InventoryAuditReport	CRMODLS_SampleInventory.ChildList	Sample Inventory
CRMODLS_InventoryPeriod	CRMOD_LS_Transactions.ChildList	Sample Transactions
CRMODLS_InventoryPeriod	CRMODLS_InventoryAuditReport.ChildList	Inventory Audit Reports
CRMODLS_InventoryPeriod	CRMODLS_InventoryPeriod Book.ChildList	Books
CRMODLS_InventoryPeriod	CRMODLS_SampleInventory.ChildList	Sample Inventory
CRMODLS_InventoryPeriod	Custom Object 1.ChildList	Custom Objects 01
CRMODLS_InventoryPeriod	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_InventoryPeriod	Custom Object 3.ChildList	Custom Objects 03
CRMODLS_InventoryPeriod	CustomObject10.ChildList	Custom Objects 10
CRMODLS_InventoryPeriod	CustomObject11.ChildList	Custom Objects 11
CRMODLS_InventoryPeriod	CustomObject12.ChildList	Custom Objects 12
CRMODLS_InventoryPeriod	CustomObject13.ChildList	Custom Objects 13
CRMODLS_InventoryPeriod	CustomObject14.ChildList	Custom Objects 14
CRMODLS_InventoryPeriod	CustomObject15.ChildList	Custom Objects 15
CRMODLS_InventoryPeriod	CustomObject4.ChildList	Custom Objects 04
CRMODLS_InventoryPeriod	CustomObject5.ChildList	Custom Objects 05
CRMODLS_InventoryPeriod	CustomObject6.ChildList	Custom Objects 06
CRMODLS_InventoryPeriod	CustomObject7.ChildList	Custom Objects 07
CRMODLS_InventoryPeriod	CustomObject8.ChildList	Custom Objects 08
CRMODLS_InventoryPeriod	CustomObject9.ChildList	Custom Objects 09
CRMODLS_OBJECTIVE	Accreditation.ChildList	Accreditations
CRMODLS_OBJECTIVE	AccreditationRequest.ChildList	Accreditation Requests
CRMODLS_OBJECTIVE	Activity.ChildList	Activities
CRMODLS_OBJECTIVE	Certification.ChildList	Certifications
CRMODLS_OBJECTIVE	CertificationRequest.ChildList	Certification Requests
CRMODLS_OBJECTIVE	Course.ChildList	Courses
CRMODLS_OBJECTIVE	CourseEnrollment.ChildList	Course Enrollments

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CRMODLS_OBJECTIVE	CRMOD_LS_MessagingPlan.ChildList	Messaging Plans
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE.Book.ChildList	Books
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE.SelfChildList	Objective
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE_ATTACHMENT.ChildList	Objective Attachments
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVETeam.ChildList	Objective Team
CRMODLS_OBJECTIVE	Custom Object 1.ChildList	Custom Objects 01
CRMODLS_OBJECTIVE	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_OBJECTIVE	Custom Object 3.ChildList	Custom Objects 03
CRMODLS_OBJECTIVE	CustomObject10.ChildList	Custom Objects 10
CRMODLS_OBJECTIVE	CustomObject11.ChildList	Custom Objects 11
CRMODLS_OBJECTIVE	CustomObject12.ChildList	Custom Objects 12
CRMODLS_OBJECTIVE	CustomObject13.ChildList	Custom Objects 13
CRMODLS_OBJECTIVE	CustomObject14.ChildList	Custom Objects 14
CRMODLS_OBJECTIVE	CustomObject15.ChildList	Custom Objects 15
CRMODLS_OBJECTIVE	CustomObject4.ChildList	Custom Objects 04
CRMODLS_OBJECTIVE	CustomObject5.ChildList	Custom Objects 05
CRMODLS_OBJECTIVE	CustomObject6.ChildList	Custom Objects 06
CRMODLS_OBJECTIVE	CustomObject7.ChildList	Custom Objects 07
CRMODLS_OBJECTIVE	CustomObject8.ChildList	Custom Objects 08
CRMODLS_OBJECTIVE	CustomObject9.ChildList	Custom Objects 09
CRMODLS_OBJECTIVE	DealRegistration.ChildList	Deal Registrations
CRMODLS_OBJECTIVE	Exam.ChildList	Exams
CRMODLS_OBJECTIVE	ExamRegistration.ChildList	Exam Registrations
CRMODLS_OBJECTIVE	Fund.ChildList	Funds
CRMODLS_OBJECTIVE	Lead.ChildList	Leads
CRMODLS_OBJECTIVE	MDFRequest.ChildList	MDF Requests
CRMODLS_OBJECTIVE	MedEdEvent.ChildList	MedEd Events
CRMODLS_OBJECTIVE	ObjectiveAssessmentChildList	Objective Assessment
CRMODLS_OBJECTIVE	Opportunity.ChildList	Opportunities
CRMODLS_OBJECTIVE	Service Request.ChildList	Service Requests

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CRMODLS_OBJECTIVE	SPRequest.ChildList	Special Pricing Requests
CRMODLS_SampleLot	CRMODLS_SampleLot Book.ChildList	Books
CRMODLS_SampleLot	Custom Object 1.ChildList	Custom Objects 01
CRMODLS_SampleLot	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_SampleLot	Custom Object 3.ChildList	Custom Objects 03
CRMODLS_SampleLot	CustomObject10.ChildList	Custom Objects 10
CRMODLS_SampleLot	CustomObject11.ChildList	Custom Objects 11
CRMODLS_SampleLot	CustomObject12.ChildList	Custom Objects 12
CRMODLS_SampleLot	CustomObject13.ChildList	Custom Objects 13
CRMODLS_SampleLot	CustomObject14.ChildList	Custom Objects 14
CRMODLS_SampleLot	CustomObject15.ChildList	Custom Objects 15
CRMODLS_SampleLot	CustomObject4.ChildList	Custom Objects 04
CRMODLS_SampleLot	CustomObject5.ChildList	Custom Objects 05
CRMODLS_SampleLot	CustomObject6.ChildList	Custom Objects 06
CRMODLS_SampleLot	CustomObject7.ChildList	Custom Objects 07
CRMODLS_SampleLot	CustomObject8.ChildList	Custom Objects 08
CRMODLS_SampleLot	CustomObject9.ChildList	Custom Objects 09
CRMODLS_Signature	Audit Trail.ChildList	Audit Trail
Custom Object 1	Accreditation.ChildList	Accreditations
Custom Object 1	ActivityClosedChildList	Completed Activities
Custom Object 1	ActivityOpenChildList	Open Activities
Custom Object 1	AssetChildList	Assets
Custom Object 1	Audit Trail.ChildList	Audit Trail
Custom Object 1	Certification.ChildList	Certifications
Custom Object 1	Course.ChildList	Courses
Custom Object 1	CRMOD_LS_Transactions.ChildList	Sample Transactions
Custom Object 1	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
Custom Object 1	CRMODLS_SampleLot.ChildList	Sample Lots
Custom Object 1	CustObj1BookChildList	Books
Custom Object 1	CustObj1ChildList	Custom Objects 01
Custom Object 1	CustObj1FACHildList	Attachments

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Custom Object 1	CustObj1NoteChildList	Notes
Custom Object 1	CustObj1TeamChildList	Custom Object 01 Team
Custom Object 1	CustObj2ChildList	Custom Objects 02
Custom Object 1	CustObj3ChildList	Custom Objects 03
Custom Object 1	CustObjAccountChildList	Accounts
Custom Object 1	CustObjCampaignChildList	Campaigns
Custom Object 1	CustObjContactChildList	Contacts
Custom Object 1	CustObjDealerChildList	Dealers
Custom Object 1	CustObjFundChildList	Funds
Custom Object 1	CustObjHouseholdChildList	Household
Custom Object 1	CustObjLeadChildList	Leads
Custom Object 1	CustObjMedEdChildList	MedEd Events
Custom Object 1	CustObjOpportunityChildList	Opportunities
Custom Object 1	CustObjPartnerChildList	Partners
Custom Object 1	CustObjPortfolioChildList	Portfolios
Custom Object 1	CustObjProductChildList	Products
Custom Object 1	CustObjSolutionChildList	Solutions
Custom Object 1	CustomObject10.ChildList	Custom Objects 10
Custom Object 1	CustomObject11.ChildList	Custom Objects 11
Custom Object 1	CustomObject12.ChildList	Custom Objects 12
Custom Object 1	CustomObject13.ChildList	Custom Objects 13
Custom Object 1	CustomObject14.ChildList	Custom Objects 14
Custom Object 1	CustomObject15.ChildList	Custom Objects 15
Custom Object 1	CustomObject4.ChildList	Custom Objects 04
Custom Object 1	CustomObject5.ChildList	Custom Objects 05
Custom Object 1	CustomObject6.ChildList	Custom Objects 06
Custom Object 1	CustomObject7.ChildList	Custom Objects 07
Custom Object 1	CustomObject8.ChildList	Custom Objects 08
Custom Object 1	CustomObject9.ChildList	Custom Objects 09
Custom Object 1	DealRegistration.ChildList	Deal Registrations
Custom Object 1	Exam.ChildList	Exams

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Custom Object 1	FinancialAccount.ChildList	Financial Accounts
Custom Object 1	MDFRequest.ChildList	MDF Requests
Custom Object 1	Policy.ChildList	Policies
Custom Object 1	SPRequest.ChildList	Special Pricing Requests
Custom Object 1	SRChildList	Service Requests
Custom Object 1	VehicleChildList	Vehicles
Custom Object 2	Accreditation.ChildList	Accreditations
Custom Object 2	ActivityClosedChildList	Completed Activities
Custom Object 2	ActivityOpenChildList	Open Activities
Custom Object 2	AssetChildList	Assets
Custom Object 2	Audit Trail.ChildList	Audit Trail
Custom Object 2	Certification.ChildList	Certifications
Custom Object 2	Course.ChildList	Courses
Custom Object 2	CRMOD_LS_Transactions.ChildList	Sample Transactions
Custom Object 2	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
Custom Object 2	CRMODLS_SampleLot.ChildList	Sample Lots
Custom Object 2	CustObj1ChildList	Custom Objects 01
Custom Object 2	CustObj2BookChildList	Books
Custom Object 2	CustObj2ChildList	Custom Objects 02
Custom Object 2	CustObj2FACHildList	Attachments
Custom Object 2	CustObj2NoteChildList	Notes
Custom Object 2	CustObj2TeamChildList	Custom Object 02 Team
Custom Object 2	CustObj3ChildList	Custom Objects 03
Custom Object 2	CustObjAccountChildList	Accounts
Custom Object 2	CustObjCampaignChildList	Campaigns
Custom Object 2	CustObjContactChildList	Contacts
Custom Object 2	CustObjDealerChildList	Dealers
Custom Object 2	CustObjFundChildList	Funds
Custom Object 2	CustObjHouseholdChildList	Household
Custom Object 2	CustObjLeadChildList	Leads
Custom Object 2	CustObjMedEdChildList	MedEd Events

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Custom Object 2	CustObjOpportunityChildList	Opportunities
Custom Object 2	CustObjPartnerChildList	Partners
Custom Object 2	CustObjPortfolioChildList	Portfolios
Custom Object 2	CustObjProductChildList	Products
Custom Object 2	CustObjSolutionChildList	Solutions
Custom Object 2	CustomObject10.ChildList	Custom Objects 10
Custom Object 2	CustomObject11.ChildList	Custom Objects 11
Custom Object 2	CustomObject12.ChildList	Custom Objects 12
Custom Object 2	CustomObject13.ChildList	Custom Objects 13
Custom Object 2	CustomObject14.ChildList	Custom Objects 14
Custom Object 2	CustomObject15.ChildList	Custom Objects 15
Custom Object 2	CustomObject4.ChildList	Custom Objects 04
Custom Object 2	CustomObject5.ChildList	Custom Objects 05
Custom Object 2	CustomObject6.ChildList	Custom Objects 06
Custom Object 2	CustomObject7.ChildList	Custom Objects 07
Custom Object 2	CustomObject8.ChildList	Custom Objects 08
Custom Object 2	CustomObject9.ChildList	Custom Objects 09
Custom Object 2	DealRegistration.ChildList	Deal Registrations
Custom Object 2	Exam.ChildList	Exams
Custom Object 2	FinancialAccount.ChildList	Financial Accounts
Custom Object 2	MDFRequest.ChildList	MDF Requests
Custom Object 2	Policy.ChildList	Policies
Custom Object 2	SPRequest.ChildList	Special Pricing Requests
Custom Object 2	SRChildList	Service Requests
Custom Object 2	VehicleChildList	Vehicles
Custom Object 3	Accreditation.ChildList	Accreditations
Custom Object 3	ActivityClosedChildList	Completed Activities
Custom Object 3	ActivityOpenChildList	Open Activities
Custom Object 3	AssetChildList	Assets
Custom Object 3	Audit Trail.ChildList	Audit Trail
Custom Object 3	Certification.ChildList	Certifications

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Custom Object 3	Course.ChildList	Courses
Custom Object 3	CRMODLS_LS_Transactions.ChildList	Sample Transactions
Custom Object 3	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
Custom Object 3	CRMODLS_SampleLot.ChildList	Sample Lots
Custom Object 3	CustObj1ChildList	Custom Objects 01
Custom Object 3	CustObj2ChildList	Custom Objects 02
Custom Object 3	CustObj3BookChildList	Books
Custom Object 3	CustObj3ChildList	Custom Objects 03
Custom Object 3	CustObj3FACHildList	Attachments
Custom Object 3	CustObj3NoteChildList	Notes
Custom Object 3	CustObj3TeamChildList	Custom Object 03 Team
Custom Object 3	CustObjAccountChildList	Accounts
Custom Object 3	CustObjCampaignChildList	Campaigns
Custom Object 3	CustObjContactChildList	Contacts
Custom Object 3	CustObjDealerChildList	Dealers
Custom Object 3	CustObjFundChildList	Funds
Custom Object 3	CustObjHouseholdChildList	Household
Custom Object 3	CustObjLeadChildList	Leads
Custom Object 3	CustObjMedEdChildList	MedEd Events
Custom Object 3	CustObjOpportunityChildList	Opportunities
Custom Object 3	CustObjPartnerChildList	Partners
Custom Object 3	CustObjPortfolioChildList	Portfolios
Custom Object 3	CustObjProductChildList	Products
Custom Object 3	CustObjSolutionChildList	Solutions
Custom Object 3	CustomObject10.ChildList	Custom Objects 10
Custom Object 3	CustomObject11.ChildList	Custom Objects 11
Custom Object 3	CustomObject12.ChildList	Custom Objects 12
Custom Object 3	CustomObject13.ChildList	Custom Objects 13
Custom Object 3	CustomObject14.ChildList	Custom Objects 14
Custom Object 3	CustomObject15.ChildList	Custom Objects 15
Custom Object 3	CustomObject4.ChildList	Custom Objects 04

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Custom Object 3	CustomObject5.ChildList	Custom Objects 05
Custom Object 3	CustomObject6.ChildList	Custom Objects 06
Custom Object 3	CustomObject7.ChildList	Custom Objects 07
Custom Object 3	CustomObject8.ChildList	Custom Objects 08
Custom Object 3	CustomObject9.ChildList	Custom Objects 09
Custom Object 3	DealRegistration.ChildList	Deal Registrations
Custom Object 3	Exam.ChildList	Exams
Custom Object 3	FinancialAccount.ChildList	Financial Accounts
Custom Object 3	MDFRequest.ChildList	MDF Requests
Custom Object 3	Policy.ChildList	Policies
Custom Object 3	SPRequest.ChildList	Special Pricing Requests
Custom Object 3	SRChildList	Service Requests
Custom Object 3	VehicleChildList	Vehicles
CustomObject10	Account.ChildList	Accounts
CustomObject10	Accreditation.ChildList	Accreditations
CustomObject10	Activity.ChildList	Activities
CustomObject10	Asset.ChildList	Assets
CustomObject10	Audit Trail.ChildList	Audit Trail
CustomObject10	Campaign.ChildList	Campaigns
CustomObject10	Certification.ChildList	Certifications
CustomObject10	Channel Partner.ChildList	Dealers
CustomObject10	Contact.ChildList	Contacts
CustomObject10	Course.ChildList	Courses
CustomObject10	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject10	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject10	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject10	Custom Object 1.ChildList	Custom Objects 01
CustomObject10	Custom Object 2.ChildList	Custom Objects 02
CustomObject10	Custom Object 3.ChildList	Custom Objects 03
CustomObject10	CustomObject10 Book.ChildList	Books
CustomObject10	CustomObject10.SelfChildList	Custom Objects 10

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject10	CustomObject10Team.ChildList	Custom Object 10 Team
CustomObject10	CustomObject11.ChildList	Custom Objects 11
CustomObject10	CustomObject12.ChildList	Custom Objects 12
CustomObject10	CustomObject13.ChildList	Custom Objects 13
CustomObject10	CustomObject14.ChildList	Custom Objects 14
CustomObject10	CustomObject15.ChildList	Custom Objects 15
CustomObject10	CustomObject4.ChildList	Custom Objects 04
CustomObject10	CustomObject5.ChildList	Custom Objects 05
CustomObject10	CustomObject6.ChildList	Custom Objects 06
CustomObject10	CustomObject7.ChildList	Custom Objects 07
CustomObject10	CustomObject8.ChildList	Custom Objects 08
CustomObject10	CustomObject9.ChildList	Custom Objects 09
CustomObject10	DealRegistration.ChildList	Deal Registrations
CustomObject10	Exam.ChildList	Exams
CustomObject10	FinancialAccount.ChildList	Financial Accounts
CustomObject10	Fund Request.ChildList	Fund Requests
CustomObject10	Fund.ChildList	Funds
CustomObject10	Household.ChildList	Household
CustomObject10	Lead.ChildList	Leads
CustomObject10	MDFRequest.ChildList	MDF Requests
CustomObject10	MedEdEvent.ChildList	MedEd Events
CustomObject10	Opportunity.ChildList	Opportunities
CustomObject10	Partner.ChildList	Partners
CustomObject10	Policy.ChildList	Policies
CustomObject10	Portfolio.ChildList	Portfolios
CustomObject10	Product.ChildList	Products
CustomObject10	Program.ChildList	Partner Programs
CustomObject10	Revenue.ChildList	Revenues
CustomObject10	Service Request.ChildList	Service Requests
CustomObject10	Solution.ChildList	Solutions
CustomObject10	SPRequest.ChildList	Special Pricing Requests

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject10	Vehicle.ChildList	Vehicles
CustomObject11	Account.ChildList	Accounts
CustomObject11	Accreditation.ChildList	Accreditations
CustomObject11	Activity.ChildList	Activities
CustomObject11	Asset.ChildList	Assets
CustomObject11	Audit Trail.ChildList	Audit Trail
CustomObject11	Campaign.ChildList	Campaigns
CustomObject11	Certification.ChildList	Certifications
CustomObject11	Channel Partner.ChildList	Dealers
CustomObject11	Contact.ChildList	Contacts
CustomObject11	Course.ChildList	Courses
CustomObject11	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject11	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject11	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject11	Custom Object 1.ChildList	Custom Objects 01
CustomObject11	Custom Object 2.ChildList	Custom Objects 02
CustomObject11	Custom Object 3.ChildList	Custom Objects 03
CustomObject11	CustomObject10.ChildList	Custom Objects 10
CustomObject11	CustomObject11 Book.ChildList	Books
CustomObject11	CustomObject11.SelfChildList	Custom Objects 11
CustomObject11	CustomObject11Team.ChildList	Custom Object 11 Team
CustomObject11	CustomObject12.ChildList	Custom Objects 12
CustomObject11	CustomObject13.ChildList	Custom Objects 13
CustomObject11	CustomObject14.ChildList	Custom Objects 14
CustomObject11	CustomObject15.ChildList	Custom Objects 15
CustomObject11	CustomObject4.ChildList	Custom Objects 04
CustomObject11	CustomObject5.ChildList	Custom Objects 05
CustomObject11	CustomObject6.ChildList	Custom Objects 06
CustomObject11	CustomObject7.ChildList	Custom Objects 07
CustomObject11	CustomObject8.ChildList	Custom Objects 08
CustomObject11	CustomObject9.ChildList	Custom Objects 09

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject11	DealRegistration.ChildList	Deal Registrations
CustomObject11	Exam.ChildList	Exams
CustomObject11	FinancialAccount.ChildList	Financial Accounts
CustomObject11	Fund Request.ChildList	Fund Requests
CustomObject11	Fund.ChildList	Funds
CustomObject11	Household.ChildList	Household
CustomObject11	Lead.ChildList	Leads
CustomObject11	MDFRequest.ChildList	MDF Requests
CustomObject11	MedEdEvent.ChildList	MedEd Events
CustomObject11	Opportunity.ChildList	Opportunities
CustomObject11	Partner.ChildList	Partners
CustomObject11	Policy.ChildList	Policies
CustomObject11	Portfolio.ChildList	Portfolios
CustomObject11	Product.ChildList	Products
CustomObject11	Program.ChildList	Partner Programs
CustomObject11	Revenue.ChildList	Revenues
CustomObject11	Service Request.ChildList	Service Requests
CustomObject11	Solution.ChildList	Solutions
CustomObject11	SPRequest.ChildList	Special Pricing Requests
CustomObject11	Vehicle.ChildList	Vehicles
CustomObject12	Account.ChildList	Accounts
CustomObject12	Accreditation.ChildList	Accreditations
CustomObject12	Activity.ChildList	Activities
CustomObject12	Asset.ChildList	Assets
CustomObject12	Audit Trail.ChildList	Audit Trail
CustomObject12	Campaign.ChildList	Campaigns
CustomObject12	Certification.ChildList	Certifications
CustomObject12	Channel Partner.ChildList	Dealers
CustomObject12	Contact.ChildList	Contacts
CustomObject12	Course.ChildList	Courses
CustomObject12	CRMOD_LS_Transactions.ChildList	Sample Transactions

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject12	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject12	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject12	Custom Object 1.ChildList	Custom Objects 01
CustomObject12	Custom Object 2.ChildList	Custom Objects 02
CustomObject12	Custom Object 3.ChildList	Custom Objects 03
CustomObject12	CustomObject10.ChildList	Custom Objects 10
CustomObject12	CustomObject11.ChildList	Custom Objects 11
CustomObject12	CustomObject12 Book.ChildList	Books
CustomObject12	CustomObject12.SelfChildList	Custom Objects 12
CustomObject12	CustomObject12Team.ChildList	Custom Object 12 Team
CustomObject12	CustomObject13.ChildList	Custom Objects 13
CustomObject12	CustomObject14.ChildList	Custom Objects 14
CustomObject12	CustomObject15.ChildList	Custom Objects 15
CustomObject12	CustomObject4.ChildList	Custom Objects 04
CustomObject12	CustomObject5.ChildList	Custom Objects 05
CustomObject12	CustomObject6.ChildList	Custom Objects 06
CustomObject12	CustomObject7.ChildList	Custom Objects 07
CustomObject12	CustomObject8.ChildList	Custom Objects 08
CustomObject12	CustomObject9.ChildList	Custom Objects 09
CustomObject12	DealRegistration.ChildList	Deal Registrations
CustomObject12	Exam.ChildList	Exams
CustomObject12	FinancialAccount.ChildList	Financial Accounts
CustomObject12	Fund Request.ChildList	Fund Requests
CustomObject12	Fund.ChildList	Funds
CustomObject12	Household.ChildList	Household
CustomObject12	Lead.ChildList	Leads
CustomObject12	MDFRequest.ChildList	MDF Requests
CustomObject12	MedEdEvent.ChildList	MedEd Events
CustomObject12	Opportunity.ChildList	Opportunities
CustomObject12	Partner.ChildList	Partners
CustomObject12	Policy.ChildList	Policies

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject12	Portfolio.ChildList	Portfolios
CustomObject12	Product.ChildList	Products
CustomObject12	Program.ChildList	Partner Programs
CustomObject12	Revenue.ChildList	Revenues
CustomObject12	Service Request.ChildList	Service Requests
CustomObject12	Solution.ChildList	Solutions
CustomObject12	SPRequest.ChildList	Special Pricing Requests
CustomObject12	Vehicle.ChildList	Vehicles
CustomObject13	Account.ChildList	Accounts
CustomObject13	Accreditation.ChildList	Accreditations
CustomObject13	Activity.ChildList	Activities
CustomObject13	Asset.ChildList	Assets
CustomObject13	Audit Trail.ChildList	Audit Trail
CustomObject13	Campaign.ChildList	Campaigns
CustomObject13	Certification.ChildList	Certifications
CustomObject13	Channel Partner.ChildList	Dealers
CustomObject13	Contact.ChildList	Contacts
CustomObject13	Course.ChildList	Courses
CustomObject13	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject13	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject13	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject13	Custom Object 1.ChildList	Custom Objects 01
CustomObject13	Custom Object 2.ChildList	Custom Objects 02
CustomObject13	Custom Object 3.ChildList	Custom Objects 03
CustomObject13	CustomObject10.ChildList	Custom Objects 10
CustomObject13	CustomObject11.ChildList	Custom Objects 11
CustomObject13	CustomObject12.ChildList	Custom Objects 12
CustomObject13	CustomObject13 Book.ChildList	Books
CustomObject13	CustomObject13.SelfChildList	Custom Objects 13
CustomObject13	CustomObject13Team.ChildList	Custom Object 13 Team
CustomObject13	CustomObject14.ChildList	Custom Objects 14

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject13	CustomObject15.ChildList	Custom Objects 15
CustomObject13	CustomObject4.ChildList	Custom Objects 04
CustomObject13	CustomObject5.ChildList	Custom Objects 05
CustomObject13	CustomObject6.ChildList	Custom Objects 06
CustomObject13	CustomObject7.ChildList	Custom Objects 07
CustomObject13	CustomObject8.ChildList	Custom Objects 08
CustomObject13	CustomObject9.ChildList	Custom Objects 09
CustomObject13	DealRegistration.ChildList	Deal Registrations
CustomObject13	Exam.ChildList	Exams
CustomObject13	FinancialAccount.ChildList	Financial Accounts
CustomObject13	Fund Request.ChildList	Fund Requests
CustomObject13	Fund.ChildList	Funds
CustomObject13	Household.ChildList	Household
CustomObject13	Lead.ChildList	Leads
CustomObject13	MDFRequest.ChildList	MDF Requests
CustomObject13	MedEdEvent.ChildList	MedEd Events
CustomObject13	Opportunity.ChildList	Opportunities
CustomObject13	Partner.ChildList	Partners
CustomObject13	Policy.ChildList	Policies
CustomObject13	Portfolio.ChildList	Portfolios
CustomObject13	Product.ChildList	Products
CustomObject13	Program.ChildList	Partner Programs
CustomObject13	Revenue.ChildList	Revenues
CustomObject13	Service Request.ChildList	Service Requests
CustomObject13	Solution.ChildList	Solutions
CustomObject13	SPRequest.ChildList	Special Pricing Requests
CustomObject13	Vehicle.ChildList	Vehicles
CustomObject14	Account.ChildList	Accounts
CustomObject14	Accreditation.ChildList	Accreditations
CustomObject14	Activity.ChildList	Activities
CustomObject14	Asset.ChildList	Assets

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject14	Audit Trail.ChildList	Audit Trail
CustomObject14	Campaign.ChildList	Campaigns
CustomObject14	Certification.ChildList	Certifications
CustomObject14	Channel Partner.ChildList	Dealers
CustomObject14	Contact.ChildList	Contacts
CustomObject14	Course.ChildList	Courses
CustomObject14	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject14	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject14	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject14	Custom Object 1.ChildList	Custom Objects 01
CustomObject14	Custom Object 2.ChildList	Custom Objects 02
CustomObject14	Custom Object 3.ChildList	Custom Objects 03
CustomObject14	CustomObject10.ChildList	Custom Objects 10
CustomObject14	CustomObject11.ChildList	Custom Objects 11
CustomObject14	CustomObject12.ChildList	Custom Objects 12
CustomObject14	CustomObject13.ChildList	Custom Objects 13
CustomObject14	CustomObject14 Book.ChildList	Books
CustomObject14	CustomObject14.SelfChildList	Custom Objects 14
CustomObject14	CustomObject14Team.ChildList	Custom Object 14 Team
CustomObject14	CustomObject15.ChildList	Custom Objects 15
CustomObject14	CustomObject4.ChildList	Custom Objects 04
CustomObject14	CustomObject5.ChildList	Custom Objects 05
CustomObject14	CustomObject6.ChildList	Custom Objects 06
CustomObject14	CustomObject7.ChildList	Custom Objects 07
CustomObject14	CustomObject8.ChildList	Custom Objects 08
CustomObject14	CustomObject9.ChildList	Custom Objects 09
CustomObject14	DealRegistration.ChildList	Deal Registrations
CustomObject14	Exam.ChildList	Exams
CustomObject14	FinancialAccount.ChildList	Financial Accounts
CustomObject14	Fund Request.ChildList	Fund Requests
CustomObject14	Fund.ChildList	Funds

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject14	Household.ChildList	Household
CustomObject14	Lead.ChildList	Leads
CustomObject14	MDFRequest.ChildList	MDF Requests
CustomObject14	MedEdEvent.ChildList	MedEd Events
CustomObject14	Opportunity.ChildList	Opportunities
CustomObject14	Partner.ChildList	Partners
CustomObject14	Policy.ChildList	Policies
CustomObject14	Portfolio.ChildList	Portfolios
CustomObject14	Product.ChildList	Products
CustomObject14	Program.ChildList	Partner Programs
CustomObject14	Revenue.ChildList	Revenues
CustomObject14	Service Request.ChildList	Service Requests
CustomObject14	Solution.ChildList	Solutions
CustomObject14	SPRequest.ChildList	Special Pricing Requests
CustomObject14	Vehicle.ChildList	Vehicles
CustomObject15	Account.ChildList	Accounts
CustomObject15	Accreditation.ChildList	Accreditations
CustomObject15	Activity.ChildList	Activities
CustomObject15	Asset.ChildList	Assets
CustomObject15	Audit Trail.ChildList	Audit Trail
CustomObject15	Campaign.ChildList	Campaigns
CustomObject15	Certification.ChildList	Certifications
CustomObject15	Channel Partner.ChildList	Dealers
CustomObject15	Contact.ChildList	Contacts
CustomObject15	Course.ChildList	Courses
CustomObject15	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject15	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject15	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject15	Custom Object 1.ChildList	Custom Objects 01
CustomObject15	Custom Object 2.ChildList	Custom Objects 02
CustomObject15	Custom Object 3.ChildList	Custom Objects 03

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject15	CustomObject10.ChildList	Custom Objects 10
CustomObject15	CustomObject11.ChildList	Custom Objects 11
CustomObject15	CustomObject12.ChildList	Custom Objects 12
CustomObject15	CustomObject13.ChildList	Custom Objects 13
CustomObject15	CustomObject14.ChildList	Custom Objects 14
CustomObject15	CustomObject15 Book.ChildList	Books
CustomObject15	CustomObject15.SelfChildList	Custom Objects 15
CustomObject15	CustomObject15Team.ChildList	Custom Object 15 Team
CustomObject15	CustomObject4.ChildList	Custom Objects 04
CustomObject15	CustomObject5.ChildList	Custom Objects 05
CustomObject15	CustomObject6.ChildList	Custom Objects 06
CustomObject15	CustomObject7.ChildList	Custom Objects 07
CustomObject15	CustomObject8.ChildList	Custom Objects 08
CustomObject15	CustomObject9.ChildList	Custom Objects 09
CustomObject15	DealRegistration.ChildList	Deal Registrations
CustomObject15	Exam.ChildList	Exams
CustomObject15	FinancialAccount.ChildList	Financial Accounts
CustomObject15	Fund Request.ChildList	Fund Requests
CustomObject15	Fund.ChildList	Funds
CustomObject15	Household.ChildList	Household
CustomObject15	Lead.ChildList	Leads
CustomObject15	MDFRequest.ChildList	MDF Requests
CustomObject15	MedEdEvent.ChildList	MedEd Events
CustomObject15	Opportunity.ChildList	Opportunities
CustomObject15	Partner.ChildList	Partners
CustomObject15	Policy.ChildList	Policies
CustomObject15	Portfolio.ChildList	Portfolios
CustomObject15	Product.ChildList	Products
CustomObject15	Program.ChildList	Partner Programs
CustomObject15	Revenue.ChildList	Revenues
CustomObject15	Service Request.ChildList	Service Requests

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject15	Solution.ChildList	Solutions
CustomObject15	SPRequest.ChildList	Special Pricing Requests
CustomObject15	Vehicle.ChildList	Vehicles
CustomObject4	Account.ChildList	Accounts
CustomObject4	Accreditation.ChildList	Accreditations
CustomObject4	Activity.ChildList	Activities
CustomObject4	Asset.ChildList	Assets
CustomObject4	Audit Trail.ChildList	Audit Trail
CustomObject4	Campaign.ChildList	Campaigns
CustomObject4	Certification.ChildList	Certifications
CustomObject4	Channel Partner.ChildList	Dealers
CustomObject4	Contact.ChildList	Contacts
CustomObject4	Course.ChildList	Courses
CustomObject4	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject4	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject4	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject4	Custom Object 1.ChildList	Custom Objects 01
CustomObject4	Custom Object 2.ChildList	Custom Objects 02
CustomObject4	Custom Object 3.ChildList	Custom Objects 03
CustomObject4	CustomObject10.ChildList	Custom Objects 10
CustomObject4	CustomObject11.ChildList	Custom Objects 11
CustomObject4	CustomObject12.ChildList	Custom Objects 12
CustomObject4	CustomObject13.ChildList	Custom Objects 13
CustomObject4	CustomObject14.ChildList	Custom Objects 14
CustomObject4	CustomObject15.ChildList	Custom Objects 15
CustomObject4	CustomObject4 Book.ChildList	Books
CustomObject4	CustomObject4.SelfChildList	Custom Objects 04
CustomObject4	CustomObject4Team.ChildList	Custom Object 04 Team
CustomObject4	CustomObject5.ChildList	Custom Objects 05
CustomObject4	CustomObject6.ChildList	Custom Objects 06
CustomObject4	CustomObject7.ChildList	Custom Objects 07

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject4	CustomObject8.ChildList	Custom Objects 08
CustomObject4	CustomObject9.ChildList	Custom Objects 09
CustomObject4	DealRegistration.ChildList	Deal Registrations
CustomObject4	Exam.ChildList	Exams
CustomObject4	FinancialAccount.ChildList	Financial Accounts
CustomObject4	Fund Request.ChildList	Fund Requests
CustomObject4	Fund.ChildList	Funds
CustomObject4	Household.ChildList	Household
CustomObject4	Lead.ChildList	Leads
CustomObject4	MDFRequest.ChildList	MDF Requests
CustomObject4	MedEdEvent.ChildList	MedEd Events
CustomObject4	Opportunity.ChildList	Opportunities
CustomObject4	Partner.ChildList	Partners
CustomObject4	Policy.ChildList	Policies
CustomObject4	Portfolio.ChildList	Portfolios
CustomObject4	Product.ChildList	Products
CustomObject4	Program.ChildList	Partner Programs
CustomObject4	Revenue.ChildList	Revenues
CustomObject4	Service Request.ChildList	Service Requests
CustomObject4	Solution.ChildList	Solutions
CustomObject4	SPRequest.ChildList	Special Pricing Requests
CustomObject4	Vehicle.ChildList	Vehicles
CustomObject5	Account.ChildList	Accounts
CustomObject5	Accreditation.ChildList	Accreditations
CustomObject5	Activity.ChildList	Activities
CustomObject5	Asset.ChildList	Assets
CustomObject5	Audit Trail.ChildList	Audit Trail
CustomObject5	Campaign.ChildList	Campaigns
CustomObject5	Certification.ChildList	Certifications
CustomObject5	Channel Partner.ChildList	Dealers
CustomObject5	Contact.ChildList	Contacts

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject5	Course.ChildList	Courses
CustomObject5	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject5	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject5	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject5	Custom Object 1.ChildList	Custom Objects 01
CustomObject5	Custom Object 2.ChildList	Custom Objects 02
CustomObject5	Custom Object 3.ChildList	Custom Objects 03
CustomObject5	CustomObject10.ChildList	Custom Objects 10
CustomObject5	CustomObject11.ChildList	Custom Objects 11
CustomObject5	CustomObject12.ChildList	Custom Objects 12
CustomObject5	CustomObject13.ChildList	Custom Objects 13
CustomObject5	CustomObject14.ChildList	Custom Objects 14
CustomObject5	CustomObject15.ChildList	Custom Objects 15
CustomObject5	CustomObject4.ChildList	Custom Objects 04
CustomObject5	CustomObject5 Book.ChildList	Books
CustomObject5	CustomObject5.SelfChildList	Custom Objects 05
CustomObject5	CustomObject5Team.ChildList	Custom Object 05 Team
CustomObject5	CustomObject6.ChildList	Custom Objects 06
CustomObject5	CustomObject7.ChildList	Custom Objects 07
CustomObject5	CustomObject8.ChildList	Custom Objects 08
CustomObject5	CustomObject9.ChildList	Custom Objects 09
CustomObject5	DealRegistration.ChildList	Deal Registrations
CustomObject5	Exam.ChildList	Exams
CustomObject5	FinancialAccount.ChildList	Financial Accounts
CustomObject5	Fund Request.ChildList	Fund Requests
CustomObject5	Fund.ChildList	Funds
CustomObject5	Household.ChildList	Household
CustomObject5	Lead.ChildList	Leads
CustomObject5	MDFRequest.ChildList	MDF Requests
CustomObject5	MedEdEvent.ChildList	MedEd Events
CustomObject5	Opportunity.ChildList	Opportunities

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject5	Partner.ChildList	Partners
CustomObject5	Policy.ChildList	Policies
CustomObject5	Portfolio.ChildList	Portfolios
CustomObject5	Product.ChildList	Products
CustomObject5	Program.ChildList	Partner Programs
CustomObject5	Revenue.ChildList	Revenues
CustomObject5	Service Request.ChildList	Service Requests
CustomObject5	Solution.ChildList	Solutions
CustomObject5	SPRequest.ChildList	Special Pricing Requests
CustomObject5	Vehicle.ChildList	Vehicles
CustomObject6	Account.ChildList	Accounts
CustomObject6	Accreditation.ChildList	Accreditations
CustomObject6	Activity.ChildList	Activities
CustomObject6	Asset.ChildList	Assets
CustomObject6	Audit Trail.ChildList	Audit Trail
CustomObject6	Campaign.ChildList	Campaigns
CustomObject6	Certification.ChildList	Certifications
CustomObject6	Channel Partner.ChildList	Dealers
CustomObject6	Contact.ChildList	Contacts
CustomObject6	Course.ChildList	Courses
CustomObject6	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject6	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject6	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject6	Custom Object 1.ChildList	Custom Objects 01
CustomObject6	Custom Object 2.ChildList	Custom Objects 02
CustomObject6	Custom Object 3.ChildList	Custom Objects 03
CustomObject6	CustomObject10.ChildList	Custom Objects 10
CustomObject6	CustomObject11.ChildList	Custom Objects 11
CustomObject6	CustomObject12.ChildList	Custom Objects 12
CustomObject6	CustomObject13.ChildList	Custom Objects 13
CustomObject6	CustomObject14.ChildList	Custom Objects 14

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject6	CustomObject15.ChildList	Custom Objects 15
CustomObject6	CustomObject4.ChildList	Custom Objects 04
CustomObject6	CustomObject5.ChildList	Custom Objects 05
CustomObject6	CustomObject6 Book.ChildList	Books
CustomObject6	CustomObject6.SelfChildList	Custom Objects 06
CustomObject6	CustomObject6Team.ChildList	Custom Object 06 Team
CustomObject6	CustomObject7.ChildList	Custom Objects 07
CustomObject6	CustomObject8.ChildList	Custom Objects 08
CustomObject6	CustomObject9.ChildList	Custom Objects 09
CustomObject6	DealRegistration.ChildList	Deal Registrations
CustomObject6	Exam.ChildList	Exams
CustomObject6	FinancialAccount.ChildList	Financial Accounts
CustomObject6	Fund Request.ChildList	Fund Requests
CustomObject6	Fund.ChildList	Funds
CustomObject6	Household.ChildList	Household
CustomObject6	Lead.ChildList	Leads
CustomObject6	MDFRequest.ChildList	MDF Requests
CustomObject6	MedEdEvent.ChildList	MedEd Events
CustomObject6	Opportunity.ChildList	Opportunities
CustomObject6	Partner.ChildList	Partners
CustomObject6	Policy.ChildList	Policies
CustomObject6	Portfolio.ChildList	Portfolios
CustomObject6	Product.ChildList	Products
CustomObject6	Program.ChildList	Partner Programs
CustomObject6	Revenue.ChildList	Revenues
CustomObject6	Service Request.ChildList	Service Requests
CustomObject6	Solution.ChildList	Solutions
CustomObject6	SPRequest.ChildList	Special Pricing Requests
CustomObject6	Vehicle.ChildList	Vehicles
CustomObject7	Account.ChildList	Accounts
CustomObject7	Accreditation.ChildList	Accreditations

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject7	Activity.ChildList	Activities
CustomObject7	Asset.ChildList	Assets
CustomObject7	Audit Trail.ChildList	Audit Trail
CustomObject7	Campaign.ChildList	Campaigns
CustomObject7	Certification.ChildList	Certifications
CustomObject7	Channel Partner.ChildList	Dealers
CustomObject7	Contact.ChildList	Contacts
CustomObject7	Course.ChildList	Courses
CustomObject7	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject7	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject7	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject7	Custom Object 1.ChildList	Custom Objects 01
CustomObject7	Custom Object 2.ChildList	Custom Objects 02
CustomObject7	Custom Object 3.ChildList	Custom Objects 03
CustomObject7	CustomObject10.ChildList	Custom Objects 10
CustomObject7	CustomObject11.ChildList	Custom Objects 11
CustomObject7	CustomObject12.ChildList	Custom Objects 12
CustomObject7	CustomObject13.ChildList	Custom Objects 13
CustomObject7	CustomObject14.ChildList	Custom Objects 14
CustomObject7	CustomObject15.ChildList	Custom Objects 15
CustomObject7	CustomObject4.ChildList	Custom Objects 04
CustomObject7	CustomObject5.ChildList	Custom Objects 05
CustomObject7	CustomObject6.ChildList	Custom Objects 06
CustomObject7	CustomObject7 Book.ChildList	Books
CustomObject7	CustomObject7.SelfChildList	Custom Objects 07
CustomObject7	CustomObject7Team.ChildList	Custom Object 07 Team
CustomObject7	CustomObject8.ChildList	Custom Objects 08
CustomObject7	CustomObject9.ChildList	Custom Objects 09
CustomObject7	DealRegistration.ChildList	Deal Registrations
CustomObject7	Exam.ChildList	Exams
CustomObject7	FinancialAccount.ChildList	Financial Accounts

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject7	Fund Request.ChildList	Fund Requests
CustomObject7	Fund.ChildList	Funds
CustomObject7	Household.ChildList	Household
CustomObject7	Lead.ChildList	Leads
CustomObject7	MDFRequest.ChildList	MDF Requests
CustomObject7	MedEdEvent.ChildList	MedEd Events
CustomObject7	Opportunity.ChildList	Opportunities
CustomObject7	Partner.ChildList	Partners
CustomObject7	Policy.ChildList	Policies
CustomObject7	Portfolio.ChildList	Portfolios
CustomObject7	Product.ChildList	Products
CustomObject7	Program.ChildList	Partner Programs
CustomObject7	Revenue.ChildList	Revenues
CustomObject7	Service Request.ChildList	Service Requests
CustomObject7	Solution.ChildList	Solutions
CustomObject7	SPRequest.ChildList	Special Pricing Requests
CustomObject7	Vehicle.ChildList	Vehicles
CustomObject8	Account.ChildList	Accounts
CustomObject8	Accreditation.ChildList	Accreditations
CustomObject8	Activity.ChildList	Activities
CustomObject8	Asset.ChildList	Assets
CustomObject8	Audit Trail.ChildList	Audit Trail
CustomObject8	Campaign.ChildList	Campaigns
CustomObject8	Certification.ChildList	Certifications
CustomObject8	Channel Partner.ChildList	Dealers
CustomObject8	Contact.ChildList	Contacts
CustomObject8	Course.ChildList	Courses
CustomObject8	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject8	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject8	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject8	Custom Object 1.ChildList	Custom Objects 01

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject8	Custom Object 2.ChildList	Custom Objects 02
CustomObject8	Custom Object 3.ChildList	Custom Objects 03
CustomObject8	CustomObject10.ChildList	Custom Objects 10
CustomObject8	CustomObject11.ChildList	Custom Objects 11
CustomObject8	CustomObject12.ChildList	Custom Objects 12
CustomObject8	CustomObject13.ChildList	Custom Objects 13
CustomObject8	CustomObject14.ChildList	Custom Objects 14
CustomObject8	CustomObject15.ChildList	Custom Objects 15
CustomObject8	CustomObject4.ChildList	Custom Objects 04
CustomObject8	CustomObject5.ChildList	Custom Objects 05
CustomObject8	CustomObject6.ChildList	Custom Objects 06
CustomObject8	CustomObject7.ChildList	Custom Objects 07
CustomObject8	CustomObject8 Book.ChildList	Books
CustomObject8	CustomObject8.SelfChildList	Custom Objects 08
CustomObject8	CustomObject8Team.ChildList	Satellite Team
CustomObject8	CustomObject9.ChildList	Custom Objects 09
CustomObject8	DealRegistration.ChildList	Deal Registrations
CustomObject8	Exam.ChildList	Exams
CustomObject8	FinancialAccount.ChildList	Financial Accounts
CustomObject8	Fund Request.ChildList	Fund Requests
CustomObject8	Fund.ChildList	Funds
CustomObject8	Household.ChildList	Household
CustomObject8	Lead.ChildList	Leads
CustomObject8	MDFRequest.ChildList	MDF Requests
CustomObject8	MedEdEvent.ChildList	MedEd Events
CustomObject8	Opportunity.ChildList	Opportunities
CustomObject8	Partner.ChildList	Partners
CustomObject8	Policy.ChildList	Policies
CustomObject8	Portfolio.ChildList	Portfolios
CustomObject8	Product.ChildList	Products
CustomObject8	Program.ChildList	Partner Programs

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject8	Revenue.ChildList	Revenues
CustomObject8	Service Request.ChildList	Service Requests
CustomObject8	Solution.ChildList	Solutions
CustomObject8	SPRequest.ChildList	Special Pricing Requests
CustomObject8	Vehicle.ChildList	Vehicles
CustomObject9	Account.ChildList	Accounts
CustomObject9	Accreditation.ChildList	Accreditations
CustomObject9	Activity.ChildList	Activities
CustomObject9	Asset.ChildList	Assets
CustomObject9	Audit Trail.ChildList	Audit Trail
CustomObject9	Campaign.ChildList	Campaigns
CustomObject9	Certification.ChildList	Certifications
CustomObject9	Channel Partner.ChildList	Dealers
CustomObject9	Contact.ChildList	Contacts
CustomObject9	Course.ChildList	Courses
CustomObject9	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject9	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject9	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject9	Custom Object 1.ChildList	Custom Objects 01
CustomObject9	Custom Object 2.ChildList	Custom Objects 02
CustomObject9	Custom Object 3.ChildList	Custom Objects 03
CustomObject9	CustomObject10.ChildList	Custom Objects 10
CustomObject9	CustomObject11.ChildList	Custom Objects 11
CustomObject9	CustomObject12.ChildList	Custom Objects 12
CustomObject9	CustomObject13.ChildList	Custom Objects 13
CustomObject9	CustomObject14.ChildList	Custom Objects 14
CustomObject9	CustomObject15.ChildList	Custom Objects 15
CustomObject9	CustomObject4.ChildList	Custom Objects 04
CustomObject9	CustomObject5.ChildList	Custom Objects 05
CustomObject9	CustomObject6.ChildList	Custom Objects 06
CustomObject9	CustomObject7.ChildList	Custom Objects 07

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
CustomObject9	CustomObject8.ChildList	Custom Objects 08
CustomObject9	CustomObject9 Book.ChildList	Books
CustomObject9	CustomObject9.SelfChildList	Custom Objects 09
CustomObject9	CustomObject9Team.ChildList	Custom Object 09 Team
CustomObject9	DealRegistration.ChildList	Deal Registrations
CustomObject9	Exam.ChildList	Exams
CustomObject9	FinancialAccount.ChildList	Financial Accounts
CustomObject9	Fund Request.ChildList	Fund Requests
CustomObject9	Fund.ChildList	Funds
CustomObject9	Household.ChildList	Household
CustomObject9	Lead.ChildList	Leads
CustomObject9	MDFRequest.ChildList	MDF Requests
CustomObject9	MedEdEvent.ChildList	MedEd Events
CustomObject9	Opportunity.ChildList	Opportunities
CustomObject9	Partner.ChildList	Partners
CustomObject9	Policy.ChildList	Policies
CustomObject9	Portfolio.ChildList	Portfolios
CustomObject9	Product.ChildList	Products
CustomObject9	Program.ChildList	Partner Programs
CustomObject9	Revenue.ChildList	Revenues
CustomObject9	Service Request.ChildList	Service Requests
CustomObject9	Solution.ChildList	Solutions
CustomObject9	SPRequest.ChildList	Special Pricing Requests
CustomObject9	Vehicle.ChildList	Vehicles
DealRegistration	Activity.ChildList	Activities
DealRegistration	Audit Trail.ChildList	Audit Trail
DealRegistration	Custom Object 1.ChildList	Custom Objects 01
DealRegistration	Custom Object 2.ChildList	Custom Objects 02
DealRegistration	Custom Object 3.ChildList	Custom Objects 03
DealRegistration	CustomObject10.ChildList	Custom Objects 10
DealRegistration	CustomObject11.ChildList	Custom Objects 11

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
DealRegistration	CustomObject12.ChildList	Custom Objects 12
DealRegistration	CustomObject13.ChildList	Custom Objects 13
DealRegistration	CustomObject14.ChildList	Custom Objects 14
DealRegistration	CustomObject15.ChildList	Custom Objects 15
DealRegistration	CustomObject4.ChildList	Custom Objects 04
DealRegistration	CustomObject5.ChildList	Custom Objects 05
DealRegistration	CustomObject6.ChildList	Custom Objects 06
DealRegistration	CustomObject7.ChildList	Custom Objects 07
DealRegistration	CustomObject8.ChildList	Custom Objects 08
DealRegistration	CustomObject9.ChildList	Custom Objects 09
DealRegistration	DealRegistration Book.ChildList	Books
DealRegistration	DealRegistrationRevenue.ChildList	Deal Registration Product Revenues
DealRegistration	DealRegistrationTeam.ChildList	Deal Registration Team
DealRegistration	Lead.ChildList	Leads
DealRegistration	SPRequest.ChildList	Special Pricing Requests
Exam	CertificationExam.ChildList	Certification Exams
Exam	Course.ChildList	Courses
Exam	CourseExam.ChildList	Course Exams
Exam	Custom Object 1.ChildList	Custom Objects 01
Exam	Custom Object 2.ChildList	Custom Objects 02
Exam	Custom Object 3.ChildList	Custom Objects 03
Exam	CustomObject10.ChildList	Custom Objects 10
Exam	CustomObject11.ChildList	Custom Objects 11
Exam	CustomObject12.ChildList	Custom Objects 12
Exam	CustomObject13.ChildList	Custom Objects 13
Exam	CustomObject14.ChildList	Custom Objects 14
Exam	CustomObject15.ChildList	Custom Objects 15
Exam	CustomObject4.ChildList	Custom Objects 04
Exam	CustomObject5.ChildList	Custom Objects 05
Exam	CustomObject6.ChildList	Custom Objects 06

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Exam	CustomObject7.ChildList	Custom Objects 07
Exam	CustomObject8.ChildList	Custom Objects 08
Exam	CustomObject9.ChildList	Custom Objects 09
Exam	Exam Book.ChildList	Books
Exam	ExamAttachment.ChildList	Exam Attachments
Exam	ExamCategory.ChildList	Exam Product Categories
Exam	ExamPartner.ChildList	Exam Partners
Exam	ExamProduct.ChildList	Exam Products
Exam	ExamRegistration.ChildList	Exam Registrations
Exam	ExamRelationship.ChildList	Related Exams
Exam	ExamSolution.ChildList	Exam Solutions
Exam	ExamTeam.ChildList	Exam Team
FinancialAccount	Activity.ChildList	Activities
FinancialAccount	Custom Object 1.ChildList	Custom Objects 01
FinancialAccount	Custom Object 2.ChildList	Custom Objects 02
FinancialAccount	Custom Object 3.ChildList	Custom Objects 03
FinancialAccount	CustomObject10.ChildList	Custom Objects 10
FinancialAccount	CustomObject11.ChildList	Custom Objects 11
FinancialAccount	CustomObject12.ChildList	Custom Objects 12
FinancialAccount	CustomObject13.ChildList	Custom Objects 13
FinancialAccount	CustomObject14.ChildList	Custom Objects 14
FinancialAccount	CustomObject15.ChildList	Custom Objects 15
FinancialAccount	CustomObject4.ChildList	Custom Objects 04
FinancialAccount	CustomObject5.ChildList	Custom Objects 05
FinancialAccount	CustomObject6.ChildList	Custom Objects 06
FinancialAccount	CustomObject7.ChildList	Custom Objects 07
FinancialAccount	CustomObject8.ChildList	Custom Objects 08
FinancialAccount	CustomObject9.ChildList	Custom Objects 09
FinancialAccount	FinancialAccount Book.ChildList	Books
FinancialAccount	FinancialAccount.SelfChildList	Financial Accounts
FinancialAccount	FinancialAccountHolder.ChildList	Financial Account Holders

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
FinancialAccount	FinancialAccountHolding.ChildList	Financial Account Holdings
FinancialAccount	FinancialPlan.ChildList	Financial Plans
FinancialAccount	FinancialTransaction.ChildList	Financial Transactions
FinancialAccount	Lead.ChildList	Leads
FinancialAccount	Opportunity.ChildList	Opportunities
FinancialAccount	Policy.ChildList	Policies
FinancialAccount	Service Request.ChildList	Service Requests
FinancialPlan	Activity.ChildList	Activities
FinancialPlan	FinancialPlan Book.ChildList	Books
FinancialPlan	Lead.ChildList	Leads
FinancialPlan	Opportunity.ChildList	Opportunities
FinancialPlan	Service Request.ChildList	Service Requests
FinancialProduct	Coverage.ChildList	Coverages
FinancialProduct	FinancialAccountHolding.ChildList	Financial Account Holdings
FinancialProduct	FinancialProduct.SelfChildList	Financial Products
FinancialProduct	FinancialTransaction.ChildList	Financial Transactions
FinancialTransaction	FinancialTransaction.SelfChildList	Financial Transactions
FinancialTransaction	Service Request.ChildList	Service Requests
Fund	Activity.ChildList	Activities
Fund	CRMODLS_OBJECTIVE.ChildList	Objective
Fund	CustObj1ChildList	Custom Objects 01
Fund	CustObj2ChildList	Custom Objects 02
Fund	CustObj3ChildList	Custom Objects 03
Fund	CustomObject10.ChildList	Custom Objects 10
Fund	CustomObject11.ChildList	Custom Objects 11
Fund	CustomObject12.ChildList	Custom Objects 12
Fund	CustomObject13.ChildList	Custom Objects 13
Fund	CustomObject14.ChildList	Custom Objects 14
Fund	CustomObject15.ChildList	Custom Objects 15
Fund	CustomObject4.ChildList	Custom Objects 04
Fund	CustomObject5.ChildList	Custom Objects 05

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Fund	CustomObject6.ChildList	Custom Objects 06
Fund	CustomObject7.ChildList	Custom Objects 07
Fund	CustomObject8.ChildList	Custom Objects 08
Fund	CustomObject9.ChildList	Custom Objects 09
Fund	FundAuditTrailChildList	Audit Trail
Fund	FundBookChildList	Books
Fund	FundCreditChildList	Fund Credits List
Fund	FundDebitChildList	Fund Debits List
Fund	FundFACHildList	Attachments
Fund	FundNoteChildList	Notes
Fund	FundParticipantChildList	Fund Participants List
Fund	FundPartnerChildList	Fund Membership
Fund	FundRequestChildList	Fund Request List
Fund	MDFRequest.ChildList	MDF Requests
Fund	MedEdEvent.ChildList	MedEd Events
Fund	SPRequest.ChildList	Special Pricing Requests
Fund Request	ActivityClosedChildList	Completed Activities
Fund Request	ActivityOpenChildList	Open Activities
Fund Request	CustomObject10.ChildList	Custom Objects 10
Fund Request	CustomObject11.ChildList	Custom Objects 11
Fund Request	CustomObject12.ChildList	Custom Objects 12
Fund Request	CustomObject13.ChildList	Custom Objects 13
Fund Request	CustomObject14.ChildList	Custom Objects 14
Fund Request	CustomObject15.ChildList	Custom Objects 15
Fund Request	CustomObject4.ChildList	Custom Objects 04
Fund Request	CustomObject5.ChildList	Custom Objects 05
Fund Request	CustomObject6.ChildList	Custom Objects 06
Fund Request	CustomObject7.ChildList	Custom Objects 07
Fund Request	CustomObject8.ChildList	Custom Objects 08
Fund Request	CustomObject9.ChildList	Custom Objects 09
Fund Request	FundRequestAuditTrailChildList	Audit Trail

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Fund Request	FundRequestFACHildList	Attachments
Fund Request	FundRequestNoteChildList	Notes
Household	Claim.ChildList	Claims
Household	CustObj1ChildList	Custom Objects 01
Household	CustObj2ChildList	Custom Objects 02
Household	CustObj3ChildList	Custom Objects 03
Household	CustomObject10.ChildList	Custom Objects 10
Household	CustomObject11.ChildList	Custom Objects 11
Household	CustomObject12.ChildList	Custom Objects 12
Household	CustomObject13.ChildList	Custom Objects 13
Household	CustomObject14.ChildList	Custom Objects 14
Household	CustomObject15.ChildList	Custom Objects 15
Household	CustomObject4.ChildList	Custom Objects 04
Household	CustomObject5.ChildList	Custom Objects 05
Household	CustomObject6.ChildList	Custom Objects 06
Household	CustomObject7.ChildList	Custom Objects 07
Household	CustomObject8.ChildList	Custom Objects 08
Household	CustomObject9.ChildList	Custom Objects 09
Household	FinancialAccount.ChildList	Financial Accounts
Household	FinancialAccountHolder.ChildList	Financial Account Holders
Household	FinancialPlan.ChildList	Financial Plans
Household	HouseholdActivityClosedChildList	Completed Activities
Household	HouseholdActivityOpenChildList	Open Activities
Household	HouseholdBookChildList	Books
Household	HouseholdContactChildList	Contacts
Household	HouseholdFACHildList	Attachments
Household	HouseholdLeadChildList	Leads
Household	HouseholdNoteChildList	Notes
Household	HouseholdOptyChildList	Opportunities
Household	HouseholdPortfolioChildList	Portfolios
Household	HouseholdSRChildList	Service Requests

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Household	HouseholdTeamChildList	Household Team
Household	Policy.ChildList	Policies
Household	PolicyHolder.ChildList	Policy Holders
InsuranceProperty	Coverage.ChildList	Coverages
InsuranceProperty	Damage.ChildList	Damages
Lead	Account Book.ChildList	Books
Lead	ActivityClosedChildList	Completed Activities
Lead	ActivityOpenChildList	Open Activities
Lead	Audit Trail.ChildList	Audit Trail
Lead	Contact Book.ChildList	Books
Lead	CustObj1ChildList	Custom Objects 01
Lead	CustObj2ChildList	Custom Objects 02
Lead	CustObj3ChildList	Custom Objects 03
Lead	CustomObject10.ChildList	Custom Objects 10
Lead	CustomObject11.ChildList	Custom Objects 11
Lead	CustomObject12.ChildList	Custom Objects 12
Lead	CustomObject13.ChildList	Custom Objects 13
Lead	CustomObject14.ChildList	Custom Objects 14
Lead	CustomObject15.ChildList	Custom Objects 15
Lead	CustomObject4.ChildList	Custom Objects 04
Lead	CustomObject5.ChildList	Custom Objects 05
Lead	CustomObject6.ChildList	Custom Objects 06
Lead	CustomObject7.ChildList	Custom Objects 07
Lead	CustomObject8.ChildList	Custom Objects 08
Lead	CustomObject9.ChildList	Custom Objects 09
Lead	DealRegistration.ChildList	Deal Registrations
Lead	LeadBookChildList	Books
Lead	LeadFACChildList	Attachments
Lead	LeadPartnerChildList	Lead Partners
Lead	LeadQualScriptChildList	Lead Qualification Scripts
Lead	LeadTeam.ChildList	Lead Team

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Lead	Opportunity Book.ChildList	Books
MDFRequest	Activity.ChildList	Activities
MDFRequest	Audit Trail.ChildList	Audit Trail
MDFRequest	Custom Object 1.ChildList	Custom Objects 01
MDFRequest	Custom Object 2.ChildList	Custom Objects 02
MDFRequest	Custom Object 3.ChildList	Custom Objects 03
MDFRequest	CustomObject10.ChildList	Custom Objects 10
MDFRequest	CustomObject11.ChildList	Custom Objects 11
MDFRequest	CustomObject12.ChildList	Custom Objects 12
MDFRequest	CustomObject13.ChildList	Custom Objects 13
MDFRequest	CustomObject14.ChildList	Custom Objects 14
MDFRequest	CustomObject15.ChildList	Custom Objects 15
MDFRequest	CustomObject4.ChildList	Custom Objects 04
MDFRequest	CustomObject5.ChildList	Custom Objects 05
MDFRequest	CustomObject6.ChildList	Custom Objects 06
MDFRequest	CustomObject7.ChildList	Custom Objects 07
MDFRequest	CustomObject8.ChildList	Custom Objects 08
MDFRequest	CustomObject9.ChildList	Custom Objects 09
MDFRequest	MDFRequest Book.ChildList	Books
MDFRequest	MDFRequestAttachment.ChildList	MDF Request Attachments
MDFRequest	MDFRequestTeam.ChildList	MDF Request Team
MedEdEvent	ActivityClosedChildList	Completed Activities
MedEdEvent	ActivityOpenChildList	Open Activities
MedEdEvent	Campaign.ChildList	Campaigns
MedEdEvent	CRMODLS_BusinessPlan.ChildList	Business Plan
MedEdEvent	CRMODLS_OBJECTIVE.ChildList	Objective
MedEdEvent	CustObj1ChildList	Custom Objects 01
MedEdEvent	CustObj2ChildList	Custom Objects 02
MedEdEvent	CustObj3ChildList	Custom Objects 03
MedEdEvent	CustomObject10.ChildList	Custom Objects 10
MedEdEvent	CustomObject11.ChildList	Custom Objects 11

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
MedEdEvent	CustomObject12.ChildList	Custom Objects 12
MedEdEvent	CustomObject13.ChildList	Custom Objects 13
MedEdEvent	CustomObject14.ChildList	Custom Objects 14
MedEdEvent	CustomObject15.ChildList	Custom Objects 15
MedEdEvent	CustomObject4.ChildList	Custom Objects 04
MedEdEvent	CustomObject5.ChildList	Custom Objects 05
MedEdEvent	CustomObject6.ChildList	Custom Objects 06
MedEdEvent	CustomObject7.ChildList	Custom Objects 07
MedEdEvent	CustomObject8.ChildList	Custom Objects 08
MedEdEvent	CustomObject9.ChildList	Custom Objects 09
MedEdEvent	Fund.ChildList	Funds
MedEdEvent	MedEdInviteeChildList	Invitees
MedEdEvent	Pharma ME Event Book.ChildList	Books
Opportunity	ActivityClosedChildList	Completed Activities
Opportunity	ActivityOpenChildList	Open Activities
Opportunity	ContactRoleChildList	Contacts
Opportunity	CRMODLS_PlanOpportunities.ChildList	Plan Opportunity
Opportunity	CustObj1ChildList	Custom Objects 01
Opportunity	CustObj2ChildList	Custom Objects 02
Opportunity	CustObj3ChildList	Custom Objects 03
Opportunity	CustomObject10.ChildList	Custom Objects 10
Opportunity	CustomObject11.ChildList	Custom Objects 11
Opportunity	CustomObject12.ChildList	Custom Objects 12
Opportunity	CustomObject13.ChildList	Custom Objects 13
Opportunity	CustomObject14.ChildList	Custom Objects 14
Opportunity	CustomObject15.ChildList	Custom Objects 15
Opportunity	CustomObject4.ChildList	Custom Objects 04
Opportunity	CustomObject5.ChildList	Custom Objects 05
Opportunity	CustomObject6.ChildList	Custom Objects 06
Opportunity	CustomObject7.ChildList	Custom Objects 07
Opportunity	CustomObject8.ChildList	Custom Objects 08

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Opportunity	CustomObject9.ChildList	Custom Objects 09
Opportunity	DealRegistration.ChildList	Deal Registrations
Opportunity	LeadChildList	Leads
Opportunity	Opportunity.SelfChildList	Sub-Opportunities
Opportunity	OpportunityBookChildList	Books
Opportunity	OpportunityCompetitorChildList	Opportunity Competitors
Opportunity	OpportunityFACHildList	Attachments
Opportunity	OpportunityPartnerChildList	Opportunity Partners
Opportunity	OpportunityTeamChildList	Opportunity Team
Opportunity	OpptyAssessmentChildList	Opportunity Assessments
Opportunity	OpptyAuditTrailChildList	Audit Trail
Opportunity	OpptyNoteChildList	Notes
Opportunity	Order.ChildList	Orders
Opportunity	ProductRevenueChildList	Opportunity Product Revenues
Opportunity	Quote.ChildList	Quotes
Opportunity	SPRequest.ChildList	Special Pricing Requests
Order	Custom Object 1.ChildList	Custom Objects 01
Order	Custom Object 2.ChildList	Custom Objects 02
Order	Custom Object 3.ChildList	Custom Objects 03
Order	CustomObject10.ChildList	Custom Objects 10
Order	CustomObject11.ChildList	Custom Objects 11
Order	CustomObject12.ChildList	Custom Objects 12
Order	CustomObject13.ChildList	Custom Objects 13
Order	CustomObject14.ChildList	Custom Objects 14
Order	CustomObject15.ChildList	Custom Objects 15
Order	CustomObject4.ChildList	Custom Objects 04
Order	CustomObject5.ChildList	Custom Objects 05
Order	CustomObject6.ChildList	Custom Objects 06
Order	CustomObject7.ChildList	Custom Objects 07
Order	CustomObject8.ChildList	Custom Objects 08

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Order	CustomObject9.ChildList	Custom Objects 09
Order	OrderItem.ChildList	Order Items
OrderItem	Custom Object 1.ChildList	Custom Objects 01
OrderItem	Custom Object 2.ChildList	Custom Objects 02
OrderItem	Custom Object 3.ChildList	Custom Objects 03
OrderItem	CustomObject10.ChildList	Custom Objects 10
OrderItem	CustomObject11.ChildList	Custom Objects 11
OrderItem	CustomObject12.ChildList	Custom Objects 12
OrderItem	CustomObject13.ChildList	Custom Objects 13
OrderItem	CustomObject14.ChildList	Custom Objects 14
OrderItem	CustomObject15.ChildList	Custom Objects 15
OrderItem	CustomObject4.ChildList	Custom Objects 04
OrderItem	CustomObject5.ChildList	Custom Objects 05
OrderItem	CustomObject6.ChildList	Custom Objects 06
OrderItem	CustomObject7.ChildList	Custom Objects 07
OrderItem	CustomObject8.ChildList	Custom Objects 08
OrderItem	CustomObject9.ChildList	Custom Objects 09
Partner	AccreditationRequest.ChildList	Accreditation Requests
Partner	ActivityClosedChildList	Completed Activities
Partner	ActivityOpenChildList	Open Activities
Partner	Application.ChildList	Applications
Partner	BrokerProfile.ChildList	Broker Profiles
Partner	CourseEnrollment.ChildList	Course Enrollments
Partner	CoursePartner.ChildList	Course Partners
Partner	CRMODLS_BusinessPlan.ChildList	Business Plan
Partner	CustObj1ChildList	Custom Objects 01
Partner	CustObj2ChildList	Custom Objects 02
Partner	CustObj3ChildList	Custom Objects 03
Partner	CustomObject10.ChildList	Custom Objects 10
Partner	CustomObject11.ChildList	Custom Objects 11
Partner	CustomObject12.ChildList	Custom Objects 12

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Partner	CustomObject13.ChildList	Custom Objects 13
Partner	CustomObject14.ChildList	Custom Objects 14
Partner	CustomObject15.ChildList	Custom Objects 15
Partner	CustomObject4.ChildList	Custom Objects 04
Partner	CustomObject5.ChildList	Custom Objects 05
Partner	CustomObject6.ChildList	Custom Objects 06
Partner	CustomObject7.ChildList	Custom Objects 07
Partner	CustomObject8.ChildList	Custom Objects 08
Partner	CustomObject9.ChildList	Custom Objects 09
Partner	DealRegistration.ChildList	Deal Registrations
Partner	ExamPartner.ChildList	Exam Partners
Partner	ExamRegistration.ChildList	Exam Registrations
Partner	Fund Request.ChildList	Fund Requests
Partner	MDFRequest.ChildList	MDF Requests
Partner	Partner Book.ChildList	Books
Partner	PartnerAccountChildList	Partner Accounts
Partner	PartnerAddress.ChildList	Addresses
Partner	PartnerAttachmentList	Attachments
Partner	PartnerBookChildList	Partner Organization Books
Partner	PartnerCampaign.PartnerChildList	Partner Campaigns
Partner	PartnerContactChildListApplet	Contacts
Partner	PartnerFundChildList	Partner Funds
Partner	PartnerLeadChildList	Partner Leads
Partner	PartnerNoteChildList	Notes
Partner	PartnerOpportunityChildList	Partner Opportunities
Partner	PartnerPlan.PartnerChildList	Partner Plans
Partner	PartnerProgramChildList	Program Memberships
Partner	PartnerRelationshipChildList	Partner Relationships
Partner	PartnerRoleChildList	Partner User Roles
Partner	PartnerTeam.ChildList	Partner Team
Partner	PartnerType.ChildList	Partner Types

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Partner	Policy.Carrier.ChildList	Policies
Partner	Policy.ChildList	Policies
Partner	Service Request.ChildList	Service Requests
Partner	SPPartner.ChildList	Partner Special Pricing Requests
Partner	SPRequest.ChildList	Special Pricing Requests
PartnerType	Partner.ChildList	Partners
Patient	PatientAssetChildList	Assets
Patient	PatientContactChildList	Relationships
Patient	PatientNoteChildList	Notes
Patient	PatientTeamChildList	Patient Team
Policy	Activity.ChildList	Activities
Policy	Audit Trail.ChildList	Audit Trail
Policy	Claim.ChildList	Claims
Policy	Coverage.ChildList	Coverages
Policy	Custom Object 1.ChildList	Custom Objects 01
Policy	Custom Object 2.ChildList	Custom Objects 02
Policy	Custom Object 3.ChildList	Custom Objects 03
Policy	CustomObject10.ChildList	Custom Objects 10
Policy	CustomObject11.ChildList	Custom Objects 11
Policy	CustomObject12.ChildList	Custom Objects 12
Policy	CustomObject13.ChildList	Custom Objects 13
Policy	CustomObject14.ChildList	Custom Objects 14
Policy	CustomObject15.ChildList	Custom Objects 15
Policy	CustomObject4.ChildList	Custom Objects 04
Policy	CustomObject5.ChildList	Custom Objects 05
Policy	CustomObject6.ChildList	Custom Objects 06
Policy	CustomObject7.ChildList	Custom Objects 07
Policy	CustomObject8.ChildList	Custom Objects 08
Policy	CustomObject9.ChildList	Custom Objects 09
Policy	InsuranceProperty.ChildList	Insurance Properties

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Policy	Lead.ChildList	Leads
Policy	Opportunity.ChildList	Opportunities
Policy	Policy Book.ChildList	Books
Policy	Policy.SelfChildList	Policies
Policy	PolicyAttachment.ChildList	Policy Attachments
Policy	PolicyHolder.ChildList	Policy Holders
Policy	Service Request.ChildList	Service Requests
Portfolio	ActivityClosedChildList	Completed Activities
Portfolio	ActivityOpenChildList	Open Activities
Portfolio	CustObj1ChildList	Custom Objects 01
Portfolio	CustObj2ChildList	Custom Objects 02
Portfolio	CustObj3ChildList	Custom Objects 03
Portfolio	CustomObject10.ChildList	Custom Objects 10
Portfolio	CustomObject11.ChildList	Custom Objects 11
Portfolio	CustomObject12.ChildList	Custom Objects 12
Portfolio	CustomObject13.ChildList	Custom Objects 13
Portfolio	CustomObject14.ChildList	Custom Objects 14
Portfolio	CustomObject15.ChildList	Custom Objects 15
Portfolio	CustomObject4.ChildList	Custom Objects 04
Portfolio	CustomObject5.ChildList	Custom Objects 05
Portfolio	CustomObject6.ChildList	Custom Objects 06
Portfolio	CustomObject7.ChildList	Custom Objects 07
Portfolio	CustomObject8.ChildList	Custom Objects 08
Portfolio	CustomObject9.ChildList	Custom Objects 09
Portfolio	FinancialAccount.ChildList	Financial Accounts
Portfolio	FinancialPlan.ChildList	Financial Plans
Portfolio	PortfolioBookChildList	Books
Portfolio	PortfolioContactChildList	Contacts
Portfolio	PortfolioSubAccountsChildList	Portfolios
Portfolio	PortfolioTeamChildList	Portfolio Team
PriceList	Account.ChildList	Accounts

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
PriceList	Order.ChildList	Orders
PriceList	Partner.ChildList	Partners
PriceList	PriceListLineItem.ChildList	Price List Line Items
PriceList	SPRequest.ChildList	Special Pricing Requests
Product	PriceListLineItem.ChildList	Price List Line Items
Program	Application.ChildList	Applications
Program	CustomObject10.ChildList	Custom Objects 10
Program	CustomObject11.ChildList	Custom Objects 11
Program	CustomObject12.ChildList	Custom Objects 12
Program	CustomObject13.ChildList	Custom Objects 13
Program	CustomObject14.ChildList	Custom Objects 14
Program	CustomObject15.ChildList	Custom Objects 15
Program	CustomObject4.ChildList	Custom Objects 04
Program	CustomObject5.ChildList	Custom Objects 05
Program	CustomObject6.ChildList	Custom Objects 06
Program	CustomObject7.ChildList	Custom Objects 07
Program	CustomObject8.ChildList	Custom Objects 08
Program	CustomObject9.ChildList	Custom Objects 09
Program	DealRegistration.ChildList	Deal Registrations
Program	Fund Request.ChildList	Fund Requests
Program	MDFRequest.ChildList	MDF Requests
Program	Opportunity.ChildList	Opportunities
Program	ProgramAttachment.ChildList	Partner Program Attachments
Program	ProgramBookChildList	Books
Program	ProgramMembershipChildList	Program Memberships
Program	SPRequest.ChildList	Special Pricing Requests
Service Request	ActivityClosedChildList	Completed Activities
Service Request	ActivityOpenChildList	Open Activities
Service Request	CustObj1ChildList	Custom Objects 01
Service Request	CustObj2ChildList	Custom Objects 02

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Service Request	CustObj3ChildList	Custom Objects 03
Service Request	CustomObject10.ChildList	Custom Objects 10
Service Request	CustomObject11.ChildList	Custom Objects 11
Service Request	CustomObject12.ChildList	Custom Objects 12
Service Request	CustomObject13.ChildList	Custom Objects 13
Service Request	CustomObject14.ChildList	Custom Objects 14
Service Request	CustomObject15.ChildList	Custom Objects 15
Service Request	CustomObject4.ChildList	Custom Objects 04
Service Request	CustomObject5.ChildList	Custom Objects 05
Service Request	CustomObject6.ChildList	Custom Objects 06
Service Request	CustomObject7.ChildList	Custom Objects 07
Service Request	CustomObject8.ChildList	Custom Objects 08
Service Request	CustomObject9.ChildList	Custom Objects 09
Service Request	Service RequestTeam.ChildList	Service Request Team
Service Request	ServiceRequestBookChildList	Books
Service Request	ServiceRequestFACChildList	Attachments
Service Request	SolutionChildList	Solutions
Service Request	SRAuditTrailChildList	Audit Trail
Service Request	SRCallScriptChildList	Call Scripts
Service Request	SRCustSatSurveyChildList	Customer Satisfaction Surveys
Service Request	SRNoteChildList	Notes
SharedAddress	Audit Trail.ChildList	Audit Trail
SharedAddress	Order.ChildList	Orders
SmartCall	SmartCallBookChildList	Books
SmartCall	SmartCallProdDetailChildList	Products Detailed
SmartCall	SmartCallPromItemDropChildList	Promotional Items
SmartCall	SmartCallSampDropChildList	Samples Dropped
Solution	AccreditationSolution.ChildList	Accreditation Solutions
Solution	CertificationSolution.ChildList	Certification Solutions
Solution	CourseSolution.ChildList	Course Solutions

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Solution	CRMOD_LS_MessagingPlan.ChildList	Messaging Plans
Solution	CRMOD_LS_MsgPlanItem.ChildList	Messaging Plan Items
Solution	CRMOD_LS_MsgPlnRel.ChildList	Messaging Plan Item Relations
Solution	CustObj1ChildList	Custom Objects 01
Solution	CustObj2ChildList	Custom Objects 02
Solution	CustObj3ChildList	Custom Objects 03
Solution	CustomObject10.ChildList	Custom Objects 10
Solution	CustomObject11.ChildList	Custom Objects 11
Solution	CustomObject12.ChildList	Custom Objects 12
Solution	CustomObject13.ChildList	Custom Objects 13
Solution	CustomObject14.ChildList	Custom Objects 14
Solution	CustomObject15.ChildList	Custom Objects 15
Solution	CustomObject4.ChildList	Custom Objects 04
Solution	CustomObject5.ChildList	Custom Objects 05
Solution	CustomObject6.ChildList	Custom Objects 06
Solution	CustomObject7.ChildList	Custom Objects 07
Solution	CustomObject8.ChildList	Custom Objects 08
Solution	CustomObject9.ChildList	Custom Objects 09
Solution	ExamSolution.ChildList	Exam Solutions
Solution	Solution Book.ChildList	Books
Solution	SolutionFACHildList	Attachments
Solution	SolutionRelatedChildList	Related Solutions
Solution	SRChildList	Service Requests
SPRequest	Activity.ChildList	Activities
SPRequest	Audit Trail.ChildList	Audit Trail
SPRequest	Custom Object 1.ChildList	Custom Objects 01
SPRequest	Custom Object 2.ChildList	Custom Objects 02
SPRequest	Custom Object 3.ChildList	Custom Objects 03
SPRequest	CustomObject10.ChildList	Custom Objects 10
SPRequest	CustomObject11.ChildList	Custom Objects 11

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
SPRequest	CustomObject12.ChildList	Custom Objects 12
SPRequest	CustomObject13.ChildList	Custom Objects 13
SPRequest	CustomObject14.ChildList	Custom Objects 14
SPRequest	CustomObject15.ChildList	Custom Objects 15
SPRequest	CustomObject4.ChildList	Custom Objects 04
SPRequest	CustomObject5.ChildList	Custom Objects 05
SPRequest	CustomObject6.ChildList	Custom Objects 06
SPRequest	CustomObject7.ChildList	Custom Objects 07
SPRequest	CustomObject8.ChildList	Custom Objects 08
SPRequest	CustomObject9.ChildList	Custom Objects 09
SPRequest	SPPartner.ChildList	Partner Special Pricing Requests
SPRequest	SPRequest Book.ChildList	Books
SPRequest	SPRequestAttachment.ChildList	Special Pricing Request Attachments
SPRequest	SPRequestLineItem.ChildList	Special Pricing Products
SPRequest	SPRequestTeam.ChildList	Special Pricing Request Team
Task	ActionContactChildList	Contacts
Task	ActionFACHildList	Attachments
Task	ActionUserChildList	Users
Task	ActivityAssessmentChildList	Activity Assessments
Task	ActivityBookChildList	Books
Task	Audit Trail.ChildList	Audit Trail
Task	CRMOD_LS_Transactions.ChildList	Sample Transactions
Task	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Task	CRMODLS_Signature.ChildList	Signature
Task	CustObj1ChildList	Custom Objects 01
Task	CustObj2ChildList	Custom Objects 02
Task	CustObj3ChildList	Custom Objects 03
Task	CustomObject10.ChildList	Custom Objects 10
Task	CustomObject11.ChildList	Custom Objects 11

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Task	CustomObject12.ChildList	Custom Objects 12
Task	CustomObject13.ChildList	Custom Objects 13
Task	CustomObject14.ChildList	Custom Objects 14
Task	CustomObject15.ChildList	Custom Objects 15
Task	CustomObject4.ChildList	Custom Objects 04
Task	CustomObject5.ChildList	Custom Objects 05
Task	CustomObject6.ChildList	Custom Objects 06
Task	CustomObject7.ChildList	Custom Objects 07
Task	CustomObject8.ChildList	Custom Objects 08
Task	CustomObject9.ChildList	Custom Objects 09
Task	Fund Request.ChildList	Fund Requests
Task	Order.ChildList	Orders
UserAdmin	AdminDelegatedFromChildList	Delegated From Users
UserAdmin	AssignedBooksChildList	Assigned Books
UserAdmin	Audit Trail.ChildList	Audit Trail
UserAdmin	DefaultBookObjChildList	Default Book by Record Type
UserAdmin	DelegateChildList	Delegated To Users
UserAdmin	DTAuditHistoryChildList	Audit
UserAdmin	LoginHistoryChildList	Sign In History
UserAdmin	QuotaChildList	Quotas
UserOwner	Audit Trail.ChildList	Audit Trail
UserOwner	DelegateChildList	Delegated To Users
UserOwner	DelegatedFromChildList	Delegated From Users
UserOwner	DTAuditHistoryChildList	Audit
UserOwner	LoginHistoryChildList	Sign In History
UserOwner	QuotaChildList	Quotas
Vehicle	Auto Vehicle Book.ChildList	Books
Vehicle	CustObj1ChildList	Custom Objects 01
Vehicle	CustObj2ChildList	Custom Objects 02
Vehicle	CustObj3ChildList	Custom Objects 03

Table 65. Child Applet IDs and Their Corresponding Names in Page Layout XML

Object	Child Applet Id	Child Applet Name
Vehicle	CustomObject10.ChildList	Custom Objects 10
Vehicle	CustomObject11.ChildList	Custom Objects 11
Vehicle	CustomObject12.ChildList	Custom Objects 12
Vehicle	CustomObject13.ChildList	Custom Objects 13
Vehicle	CustomObject14.ChildList	Custom Objects 14
Vehicle	CustomObject15.ChildList	Custom Objects 15
Vehicle	CustomObject4.ChildList	Custom Objects 04
Vehicle	CustomObject5.ChildList	Custom Objects 05
Vehicle	CustomObject6.ChildList	Custom Objects 06
Vehicle	CustomObject7.ChildList	Custom Objects 07
Vehicle	CustomObject8.ChildList	Custom Objects 08
Vehicle	CustomObject9.ChildList	Custom Objects 09
Vehicle	Service Request.ChildList	Service Requests
Vehicle	VehicleContactChildList	Contacts
Vehicle	VehicleFinInfoChildList	Financial Information
Vehicle	VehicleSalesHistChildList	Sales History
Vehicle	VehicleServHistChildList	Service History

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