

# **Administering Oracle CRM On Demand**

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# 1

## Administering Oracle CRM On Demand

Use the Administrator pages to set up and customize Oracle CRM On Demand. For more information about administering Oracle CRM On Demand, see the following sections:

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	<p>(on page 59)</p> <p><a href="#">Access Profile and Role Settings for Addresses</a> (on page 60)</p>
<a href="#">Application Customization</a> (on page 62)	<p><b>Tasks for Record Type Setup</b></p> <p><a href="#">Creating and Editing Fields</a> (on page 75)</p> <p><a href="#">Administering the Copy Enabled Setting</a> (on page 79)</p> <p><a href="#">Setting Up Custom Field Integration Tags</a> (on page 80)</p> <p><a href="#">Setting Up Web Links</a> (on page 80)</p> <p><a href="#">Renaming Fields</a> (on page 83)</p> <p><a href="#">Using Indexed Custom Fields</a> (on page 84)</p> <p><a href="#">Reverting Settings to Defaults</a> (on page 86)</p> <p><a href="#">Changing Picklist Values</a> (on page 87)</p> <p><a href="#">Customizing Related Item Layouts</a> (on page 89)</p> <p><a href="#">Customizing Static Page Layouts</a> (on page 89)</p> <p><a href="#">Renaming Field Section Titles</a> (on page 93)</p> <p><a href="#">Creating Web Applets</a> (on page 94)</p> <p><a href="#">Defining Cascading Picklists</a> (on page 95)</p> <p><a href="#">Managing Search Layouts</a> (on page 96)</p> <p><a href="#">Managing List Access and List Order</a> (on page 100)</p> <p><a href="#">Creating Homepage Custom Reports</a> (on page 100)</p> <p><a href="#">Creating Record Homepage Layouts</a> (on page 102)</p> <p><a href="#">Customizing the Audit Trail</a> (on page 103)</p> <p><a href="#">Specifying Dynamic Page Layouts</a> (on page 107)</p> <p><b>Tasks for Application Setup</b></p> <p><a href="#">Displaying External Web Pages in Tabs</a> (on page 110)</p> <p><a href="#">Creating and Managing Action Bar Layouts</a> (on page 118)</p> <p><a href="#">Creating Global Web Applets</a> (on page 119)</p> <p><a href="#">Uploading Client Side Extensions</a> (on page 122)</p> <p><a href="#">Customizing My Homepage for Your Company</a> (on page 125)</p> <p><a href="#">Creating New Themes</a> (on page 126)</p> <p><a href="#">Enabling Custom Reports in My Homepage</a> (on page 129)</p> <p><a href="#">Renaming Record Types</a> (on page 130)</p> <p><a href="#">Changing the Icon for a Record Type</a> (on page 132)</p>



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Additionally, administrators can usually do the following:

- Create custom reports for their own use or for company-wide distribution. For instructions, see [Reports](#).
- Create filtered lists for company-wide distribution. For instructions, see [Working with Lists](#).

For information about using Oracle On Demand Expression Builder, see [Expression Builder](#) (on page 588).

## Processes for Administering Oracle CRM On Demand

The Administrator pages in Oracle CRM On Demand allow you to manage the deployment of Oracle CRM On Demand to your users and the setting up of your data requirements. Using the Administrator pages, you can customize the appearance of Oracle CRM On Demand to meet your specific business requirements. Use the following guidelines to manage your deployment of Oracle CRM On Demand:

- 1 Review all available resources.

Before you set up a new Oracle CRM On Demand deployment, review the following resources:

- Read the *Oracle CRM On Demand Administrator Preview Guide*. This guide is available to all company administrators and provides information on how to enable functionality in Oracle CRM On Demand. For

more information on how to access the *Oracle CRM On Demand Administrator Preview Guide*, click the Training and Support link in Oracle CRM On Demand.

- Review the additional tools, templates, checklists, Web seminars, and guides by clicking the Training and Support link in Oracle CRM On Demand.
- Enroll in the Administration Essentials course offered by Oracle University.

### 2 Evaluate your business processes and the roles that users play within your organization.

Review the *Oracle CRM On Demand Administrator Rollout Guide* available on My Oracle Support. Download and use the Custom Field Setup Template to plan your deployment properly from the start. The Custom Field Setup Template is available in the Tools and Templates page in the Training and Support Center in My Oracle Support.

- Define data visibility and how the data will be secured by considering the following factors and functionality:
  - **Access Profiles.** For more information, see [Access Profile Management](#) (on page 168).
  - **Teams.** For more information, see [Sharing Records \(Teams\)](#).
  - **Books.** For more information, see [Book Management](#) (on page 215).
  - **Manager Visibility.** For more information, see [Setting Up Your Company Profile and Global Defaults](#) (on page 16).
- Define the data model and relevant fields. Evaluate which reports require trend analysis, real-time trend analysis, and the record types that they support.
- Define the following processes associated with validating and interacting with data:
  - Setting up sales processes. For more information see [Setting Up Sales Processes, Categories, and Coaches](#) (on page 343).
  - Defining lead conversion layouts and field mappings. For more information, see [Lead Conversion Administration](#) (on page 331).
  - Defining field validation. For more information, see [About Field Management](#) (on page 65).
  - Defining workflow processes. For more information, see [Business Process Management](#) (on page 263).
  - Integrating Oracle CRM On Demand with Web services. For more information, see [Web Services Integration](#) (on page 543).
- Define Customer Test Environments (CTEs) and any additional environments for training and testing.

### 3 Set up your company.

Each company is unique. In Oracle CRM On Demand, you can customize many company settings so that they match your business setup.

- Set up your company's fiscal year, languages, currencies, exchange rates, and so on.
- Request the appropriate access rights and CTE. For more information on setting up your company, see [Setting Up Your Company Profile and Global Defaults](#) (on page 16).

### 4 Set up your user profiles.

Users in a company have specific roles and responsibilities. Some users have access to certain data, while others do not. Before adding these users, set up the visibility and role for each type of user.

- Set up the access profiles for your company. For more information, see [Access Profile Management](#) (on page 168).
- Set up the roles for your Oracle CRM On Demand users. For more information, see [Adding Roles](#) (on page 210).
- Set up your visibility model, for example, books, teams, and so on. For more information, see [Book Management](#) (on page 215) and [Sharing Records \(Teams\)](#).

### 5 Configure the data model, for example, add or rename fields, record types, and so on.

Data requirements are also unique in a company. In Oracle CRM On Demand you can add new fields to existing record types, rename fields to match your business terms, or add new custom record types. Before you start to add data, do the following:

- Add the new fields and record types required for the definition of your data model. For more information, see [Creating and Editing Fields](#) (on page 75) and [Adding Record Types](#) (on page 132).
- Rename the fields and record types to match your specific business terms. For more information, see [Renaming Fields](#) (on page 83) and [Renaming Record Types](#) (on page 130).
- Populate picklists. You can use the import functionality to import large numbers of picklist values to picklist fields quickly. For more information, see [Changing Picklist Values](#) (on page 87).
- Configure layouts. Display only the fields required for each role and to use dynamic layouts. For more information, see [Customizing Static Page Layouts](#) (on page 89) and [Specifying Dynamic Page Layouts](#) (on page 107).
- Configure your processes such as workflows, sales processes, and so on. For more information, see [Business Process Management](#) (on page 263) and [Setting Up Sales Processes, Categories, and Coaches](#) (on page 343).
- Configure lists for roles. The first 10 lists appear on a user's homepage. It is recommended that lists do not return large amounts of data. Twenty-five to 100 records is the recommended manageable number of records for daily tasks. It is also recommended to do the following:
  - Use indexed fields whenever possible.
  - In the list, include fields that users want to update frequently.

For more information on configuring lists, see [Creating and Refining Lists](#).

### 6 Provide information about business metrics by generating reports.

Use the Reports functionality in Oracle CRM On Demand to generate custom reports that are relevant to your business needs, and then make them accessible to users. For more information on reports, see [About Reports](#).

### 7 Import your data and users.

Use the import functionality to import legacy data to Oracle CRM On Demand. You can import all of your users, or add them all manually through the User Management page. When users have been added, they receive an email with their temporary password to access Oracle CRM On Demand, and they can start working immediately. For more information on importing data, see [Import and Export Tools](#) (on page 351).

## Using Administrator Templates During Setup

You can use administrator setup templates to help you organize your company's information and implement Oracle CRM On Demand efficiently.

After you have entered your information in the templates, you can use the templates as a reference during setup and customization of the application.

### *To access administrator setup templates*

- 8 Click the link for the template you want.

Links for the available templates are shown in the following section.

- 9 Save the template to your computer.

- 10 Open the saved file.

## About Usage Tracking in Oracle CRM On Demand

Usage tracking functionality allows companies to monitor and analyze the usage of their Oracle CRM On Demand application, including user usage, application usage, and setup and configuration details. A number of prebuilt reports on usage tracking are provided for reporting on the Oracle CRM On Demand usage. In addition to the prebuilt reports, the Usage Tracking Analysis subject area is available in the Analytics area in Oracle CRM On Demand Answers for companies that want to further analyze their Oracle CRM On Demand usage.

For example, you might want to create reports to provide information about the following:

- Users who did not sign in during the last 30 days
- Record types for which no records were created, updated, or deleted in the last 30 days
- The number of workflow rules, custom fields, and custom tabs that have been created in Oracle CRM On Demand

**TIP:** For information about reviewing Web services usage, see [Reviewing Web Services Utilization](#) (on page 545).

To access the prebuilt usage tracking reports and to create new reports in the Usage Tracking Analysis subject area, you must have the Usage Tracking privilege in your user role. The Usage Tracking privilege is enabled by default for the company administrator's role.

### About the Usage Tracking Privilege

Company administrators can enable the Usage Tracking privilege for other user roles as necessary. However, before you enable the Usage Tracking privilege for a user role, consider the following implications of enabling the privilege:

- Users who have the Usage Tracking privilege in their user role can access the Usage Tracking Analysis subject area in Oracle CRM On Demand Answers, as well as the prebuilt reports on usage tracking.

- Access to usage tracking data is not secured by any other access settings, such as the access settings for record types in access profiles and user roles. Therefore, users who have the Usage Tracking privilege in their role can access all of the usage tracking data in the Usage Tracking Analysis subject area.

Because some of your company's usage data might be considered sensitive, you must ensure that only the appropriate users are granted the Usage Tracking privilege.

- Usage tracking reporting can result in intensive use of system resources.

If you want to make some usage tracking reports available to certain users, but you do not want the users to have full access to the Usage Tracking Analysis subject area and prebuilt reports, consider creating custom reports that contain the relevant data. Then, you can store the custom reports in a shared reports folder, and give the users access to the shared folder only.

In Oracle CRM On Demand, you can view data about service allotment usage, see [Viewing Service Allotment Usage for Your Company](#) (on page 50) and [Viewing Historical Service Allotment Usage](#) (on page 51) and data about file and record usage, see [Viewing File and Record Utilization Information](#) (on page 52).

### Related Topics

For more information about the Usage Tracking Analysis subject area and about reports, see the following topics:

- About Prebuilt Reports
- Usage Tracking Analytic Subject Area
- Getting Started with Answers (Custom Reports)

## Company Administration

**Before you begin.** Unless otherwise indicated, to perform the procedures described in the Company Administration section, your role must include the Administer Company Profile privilege.

Click a topic to see step-by-step instructions for the procedures pertaining to Company Administration:

- [Setting Up Your Company Profile and Global Defaults](#) (on page 16)
- [Verifying License Statuses and Active Users](#) (on page 26)
- [Defining Your Company's Password Controls](#) (on page 28)
- [Resetting All Passwords](#) (on page 35)
- [Activating Languages](#) (on page 35)
- [Defining a Custom Fiscal Calendar](#) (on page 38)
- [Managing Currencies](#) (on page 40)
- [Reviewing Sign-In Activity for All Users](#) (on page 44)
- [Restricting Use to IP Addresses](#) (on page 36)
- [Reviewing Your Company's Resource Usage](#) (on page 44)
- [Reviewing Audit Trail Changes with the Master Audit Trail](#) (on page 45)

- [Publishing Company-Wide Alerts](#) (on page 47)
- [Viewing Service Allotment Usage for Your Company](#) (on page 50)
- [Viewing Historical Service Allotment Usage](#) (on page 51)
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- [Converting Unshared Addresses to Shared Addresses](#) (on page 54)
- [Considerations When Turning Off Shared Addresses](#) (on page 57)
  - [Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses](#) (on page 58)
- [Setting the Address Type for Unshared Addresses Using Edit Rel](#) (on page 59)
- [Access Profile and Role Settings for Addresses](#) (on page 60)

## Company Profile

Setting up the company profile includes:

- [Setting Up Your Company Profile and Global Defaults](#) (on page 16)
- [Verifying License Statuses and Active Users](#) (on page 26)
- [Defining Your Company's Password Controls](#) (on page 28)
- [Resetting All Passwords](#) (on page 35)
- [Activating Languages](#) (on page 35)
- [Restricting Use to IP Addresses](#) (on page 36)

## Setting Up Your Company Profile and Global Defaults

Both company information and global defaults are set through the Company Profile page.

**Company Information.** You can enter or edit your company name, addresses for shipping and billing, phone number, and primary contact. If you signed up for a trial period, some information about your company is carried over from your sign-up data.

**Global Defaults.** You can define your company-wide defaults, which users can override.

**CAUTION:** The company administrator can change the Country setting. If you change the Country setting, notify Customer Care so that it can take the necessary steps to update your Time Zone setting, as well as your reports and dashboards. Language, Currency, and Time Zone can only be changed by contacting Customer Care.

**Before you begin.** To understand the effect of these settings, read About Profile Settings for Users.

To perform this procedure, your role must include the Administer Company Profile privilege.



### To edit your company profile

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 On the Company Profile page, click the Edit button (or use inline edit) and make changes.
- 5 Save the record.

This table describes some of the fields that appear.

Field	Description
<b>Company Key Information</b>	
Company Sign In ID	A unique identifier for your company. When creating new users this is the first portion of the User Sign In Id (Company Sign In ID/User ID) for the user.
Primary Contact	<p>Defaults to ADMIN or the alias of the first user from your company who signs in, but can be changed to any user. Product update and other important information are sent to the primary contact.</p> <p>To cover situation when the primary contact is not available, you can enter a distribution list as the email address for the primary contact so that more than one person is notified of system failures and other important information. You can do this in either of two ways:</p> <ul style="list-style-type: none"> <li>■ You can enter an existing distribution list as the email address on the user record for the primary contact. However, you must remember that if the primary contact does something in the system that sends an automated email to his or her email address, the entire distribution list receives that notification.</li> <li>■ You can create a new "dummy" user. You could name this user something like "DistributionList", and then enter the distribution list as the email address on the user record for the dummy user. In this case, you are committing one of your licenses just for this task.</li> </ul> <p><b>NOTE:</b> You cannot make the user specified as your primary contact inactive. Instead, you must select another user for the primary contact before you can change the original primary contact's status to Inactive.</p>
<b>Company Settings</b>	
Default Language	<p>The language used as the default for your users. You can activate additional languages so that users can change the setting for their own use. For information on how to add languages, see <a href="#">Activating Languages</a> (on page 35).</p> <p>To update this field, contact Customer Care.</p>
Default Locale	The regional settings used as a default for your users. Users can change

Field	Description
	the setting for their own use at any time from the User Profile page. These settings determine the formatting for dates, time, currency, numbers, and phone numbers.
Default Currency	<p>The currency used as a default for your users. You can activate additional currencies so that users can change the setting for their own use (see <a href="#">Managing Currencies</a> (on page 40)). However, the currency set here determines the default currency used for forecasts, which are company-wide.</p> <p>To update this field, contact Customer Care.</p>
Default Time Zone	<p>Default time zone for your company.</p> <p>Some functions, such as forecast generation, use the time zone of the hosting facility instead of this default time zone. Contact Customer Care to find out this time zone. Users in other regions can choose to use their local time zone, which is set on the User Profile page.</p> <p>To update this field, contact Customer Care.</p>
Record Preview Mode	<p>The default record preview mode for your company. You can enable the record preview functionality, and specify how the preview window opens. Depending on the setting that you select in this field, a preview window opens when users rest their pointer on a link to a record, or when they click a preview icon that appears when they rest their pointer on a link to a record.</p> <p>The preview window shows the first section of the Detail page of the record. You also have the option of disabling the record preview functionality by selecting Off in this field. By default, this field is set to Click on Preview Icon when Oracle CRM On Demand is first set up for a new company.</p> <p>Users can override the company default setting by specifying a different record preview mode in their Personal Detail page.</p>
Inline Edit Enabled	<p>Enables or disables the inline editing feature.</p> <p>When inline editing is enabled, users can edit fields directly on List pages and on Detail pages (that is, without opening the Edit page for the record).</p> <p>Inline editing is supported in record List pages, record Detail pages, and in many linked records on main record Detail pages.</p> <p>Note that the following types of fields in linked records cannot be edited from the Detail page of the main record:</p> <ul style="list-style-type: none"> <li>■ Fields that are not shown in the Detail page of the linked record itself</li> <li>■ Calculated fields, for example, Full Name</li> <li>■ Fields that are read-only on the Edit page of the linked record</li> </ul> <p>Also, in cases where the same linked record can show up under multiple main records, the fields that are part of the relationship can be edited. However, the fields that belong to the linked record itself cannot be edited.</p>

Field	Description
	For example in the Account Team related list on an account record, the Team Role field can be edited, because the field is part of the relationship between the account and the team member. However, the Last Name and First Name fields cannot be edited, because they belong to the user record (of the team member).
Message Center Enabled	Controls whether: <ul style="list-style-type: none"> <li>■ The Message Center appears in the Action bar.</li> <li>■ The Notes icon and list of notes is available in Record detail pages.</li> <li>■ Users can use the Message Center widget.</li> </ul>
Record Type Auditable Fields	The maximum number of fields that you can audit for each object, which is shown as a read-only field. The default number is 35, but company administrators can change this value. <p><b>NOTE:</b> With each additional field audited, another record must be created in the database when that field is changed. When you audit too many fields at once, it can impact performance when saving the audited record.</p>
Audit Expiry (Days)	The age, in days, of field audit records before they are purged. Company administrators can set this value to a value between 1 and 90 days. To view the value set for your company, go to the Company Security Settings section on the Company Profile page. Note that a value of zero (0) indicates that no field audit records are being purged. Only Oracle CRM On Demand Customer Care can set a value of 0. Company administrators must have the Administer Field Audit privilege to change this setting.
Related Information Format	Select the default format for related information sections on the record Detail pages. <p>The related information sections can appear as lists or as tabs that users can click to view the lists. You can also set a default setting for the Related Information Format option for each role. Users whose role has the Personalize Related Information Display Format privilege can also set the Related Information Format option in their personal profile. If the Related Information Format option in a user's personal profile is blank, then the default setting for the user's role is used. If the Related Information Format option on the user's role is blank, then the default setting for the company is used.</p>
Global Search Method	Select which search method you want to make available to your users in the Search section in the Action bar and in the Lookup windows: <ul style="list-style-type: none"> <li>■ <b>Targeted Search.</b> A targeted search searches specified fields to find matches. In a targeted search, users can enter values in several fields. The search returns only those records where a match is found for each of the values the user entered. The search layouts that are assigned to user roles for the record types determine which fields users can search. Targeted search is enabled by default in Oracle CRM On Demand. For more information about targeted search, see About Targeted Search.</li> <li>■ <b>Keyword Search.</b> A keyword search searches default fields that are</li> </ul>

Field	Description
	specific to each record type. In a keyword search, users enter a text string in a single text box. The search returns all records where the text string the user entered is found in any of the searched fields. For more information about keyword search, see About Keyword Search.
Fiscal Year Start Month	<p>This field displays the month in which your fiscal calendar begins.</p> <p>This field is initially set when your company is created and cannot be changed by the company administrator.</p> <p>This setting affects reports that measure revenue against your fiscal year.</p> <p>To update this field, contact Customer Care.</p>
Fiscal Year Start Date	<p>This field displays the date within the specified month in which your fiscal year begins.</p> <p>This field is initially set when your company is created and cannot be changed by the company administrator.</p> <p>This setting affects reports that measure revenue against your fiscal year.</p> <p>To update this field, contact Customer Care.</p>
Fiscal Calendar Type	<p>This field displays the type of fiscal year calendar you use. You can select from the following values: Calendar Quarters, 4-4-5, 5-4-4, Custom Fiscal Calendar. This setting affects time-based analyses, business plans, and forecasts. The company administrator cannot change this field.</p> <p>To update this field, contact Customer Care.</p>
Product Probability Averaging Enabled	<p>Determines how the opportunity probability is updated when the user clicks the Update Opportunity Totals button:</p> <ul style="list-style-type: none"> <li>■ If selected, the opportunity probability is calculated based on the weighted average of probability for each of the linked products: <math display="block">\text{Opportunity Probability} = \frac{\text{SUM}(\text{Product Expected Revenue})}{\text{SUM}(\text{Product Revenue})}</math> </li> <li>■ If deselected, the probability is not updated as part of the action.</li> </ul> <p><b>NOTE:</b> The Update Opportunity Totals button is located on the Opportunity Detail page, in the title bar in the Products related information section.</p>
Enable Save & Add Product	<p>If this setting is selected and a user creates a new Opportunity record, the Save &amp; Add Product button is displayed in the Opportunity page header instead of the Save button. If this setting is deselected and a user creates a new Opportunity record, the Save &amp; Add Product button is not displayed in the Opportunity page header, only the Save button is available.</p>
Enable Opportunity Revenue Split	<p>Select this option to enable the splitting of opportunity revenue among team members.</p> <p>When this check box is selected, the Refresh Totals and Spread Split</p>

Field	Description
	<p>buttons are displayed on the Opportunity Team Edit Users page, allowing revenue to be split among team members. The Opportunity Revenue Forecast and My Opportunities page display opportunities where the user is a Team Member with a greater than 0 split revenue.</p> <p>When this check box is deselected, the Refresh Totals and Spread Split buttons are not displayed on the Opportunity Team Edit Users page. The Opportunity Revenue Forecast and My Opportunities page display opportunities where the user is an Opportunity Owner.</p>
Head-up Display	<p>If the head-up display functionality is enabled, links to the related information sections of the page (such as linked records sections) are available in the head-up display at the bottom of your browser window. Users can also remove the head-up display completely from Detail pages, by turning off the functionality in their personal profiles. For more information on the Head-up Display, see Oracle CRM On Demand Page-by-Page Overview.</p> <p><b>NOTE:</b> The head-up display functionality can be turned on or off at company level, and by each individual user. A user's personal setting overrides the company setting. The colors in the head-up display are determined by the theme you are using. For more information about choosing a theme, see <a href="#">Setting Your Theme</a>.</p>
Enable Shared Addresses	<p>Select this option to turn on sharing of the top-level address records in account, contact, dealer, and partner records. If this option is deselected, then only unshared address functionality is available in account, contact, dealer, and partner records. For more information on shared addresses, see <a href="#">Addresses</a>.</p> <p><b>NOTE:</b> If shared addresses are turned on, then review the information in <a href="#">Considerations When Turning Off Shared Addresses</a> (on page 57) and complete the procedure in <a href="#">Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses</a> (on page 58) before you turn off shared addresses. Shared addresses are not compatible with prepackaged Oracle product integrations such as an Oracle Process Integration Pack (PIP). If you are using a PIP, such as Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite PIP, do not select the Enable Shared Addresses setting.</p>
Validate Shared Addresses	<p>Select this option to validate shared addresses in a company. If this option is selected, then users can select shared addresses to add to the account, contact, dealer, or partner records. Nonvalidated addresses are filtered from account, contact, dealer and partner records, and the New address button is disabled in these records.</p> <p>If Validate Shared Addresses is deselected, then all addresses are available on account, contact, dealer or partner records (that is, no filtering takes place and the New address button is enabled in these records for users with the necessary privileges).</p> <p>For more information on validating addresses, see <a href="#">Marking Shared Addresses as Validated</a>.</p>

Field	Description
Order Usage	<p>Select how users work with orders and order items in Oracle CRM On Demand.</p> <p>If you select the CRM On Demand Order Management value, then users can use order management in Oracle CRM On Demand Life Sciences Edition.</p> <p>If you select the Ebiz PIP Integration value, then users can use the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution.</p> <p>Users require the Enable Order Access privilege in their role to use the order functionality for either of these purposes.</p>
<b>Company Theme Setting</b>	
Theme Name	<p>The theme determines the look-and-feel of Oracle CRM On Demand. When Oracle CRM On Demand is first set up for a new company, the default theme is Oracle. To change the theme, click the Theme Name list, and then select the theme that you want for the company. Users can also override this setting when they edit their personal preferences.</p> <p>Themes have no effect on how Oracle CRM On Demand behaves. Company administrators can create custom themes in Oracle CRM On Demand. Contact your company administrator if you want to submit your own themes to use in Oracle CRM On Demand.</p>
<b>Company Data Visibility Settings</b>	
Manager Visibility Enabled	Select this option to allow managers to see the records of the users who report to them directly or indirectly. A user's manager is specified in either the Reports To field or the Reports To (Alias) field on the User Detail page, depending on which of these fields is displayed on the page.
Enable Parent Team Inheritance	Select this option to enable Opportunity and Contact teams to inherit Account team members. When enabled, any new team member added to the Account team will be also be added to every account-related Contact and Opportunity team.
Default Group Assignment	Select this option to allow group members to share ownership of accounts, activities, contacts, households, opportunities, and portfolios. For more information, see <a href="#">Group Management</a> (on page 257).
Enable Books	<p>Controls whether the Book selector displays custom books. If this check box is not enabled, the Book selector displays only user books and books for delegates, if delegates exist.</p> <p><b>CAUTION:</b> Do not select the Enable Books option until you have created your book hierarchy. You cannot deselect this option after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.</p>
Display Book Selector	Enables or disables the Book selector, which you can use to refine searches for records of a particular user, delegate, or custom books.

Field	Description
<b>Integration Settings</b>	
Integration Event Enabled	If you are a new customer, the integration event functionality is automatically enabled. However, if you are an existing customer, the Oracle CRM On Demand integration event functionality must be configured by Customer Care and by your company administrator. Contact Customer Care to request support for Integration Event Administration and to specify the maximum total size of the integration event queues you require.
Web Services R16 Compatibility Mode	Controls whether Web services requests containing the Username and Password tokens are processed as stateless requests or as stateful requests as in Oracle CRM On Demand Release 16 and earlier. This check box is deselected by default for all new companies.
Enable Workflow	If your company has been set up to allow workflow, this setting is displayed. This setting can be activated once you have created the workflow conditions you want to deploy.
<b>Desktop Integration Settings</b>	
Offline Client Edit Access	This setting verifies record edit access either on upload or on download (in previous releases, Oracle CRM On Demand only verified access upon download). It is recommended to verify access at the time data is uploaded. The three options are: Verify on Upload (this is the default value for new customers), Verify on Download, none. Verify on Upload is the recommended option for use by customers. If the blank picklist option is selected, Oracle CRM On Demand verifies access in the same manner as the Verify on Download option.
<b>Company Security Settings</b>	
Company Idle Timeout (minutes)	This is the time allowed in minutes before a user's session ends because of inactivity. If the value for this field is blank, the interactive session timeout setting is determined by the System Default Idle Timeout value. You can view the current System Default Idle Timeout setting, located at the top of the Company Security Settings section, on the Company Profile page. This value is visible when you edit the Company Profile page. You can contact Customer Care to update the Company Idle Timeout value to a value between 10 minutes and 90 minutes.
Authentication Type	<p>Displays which authentication types are allowed for your company. This value can only be assigned by Customer Care. The following values are possible:</p> <ul style="list-style-type: none"> <li>■ User ID/Password Only - All users must sign in using their Oracle CRM On Demand User ID and password.</li> <li>■ Single Sign-On Only - All users must sign in using your company's single sign-on mechanism. Oracle CRM On Demand User IDs and passwords are not accepted.</li> <li>■ User ID/PWD or Single Sign-On - Either User ID and password for Oracle CRM On Demand, or single sign-on can be used to sign in to Oracle CRM On Demand.</li> </ul>

Field	Description
	Authentication type can be set for each user by the company administrator on the User Profile page. If the user's value is empty, then the company-level setting is used for that user.
External Identifier for Single Sign-On	Unique company identifier assigned by Customer Care when Single Sign-On is configured for the company. This value cannot be changed by the company administrator, although External Identifiers may be set for each user on the User Profile page.
Sign In Page for UserID/Pwd Authentications	<p>The URL to a company-specific custom Sign In page, which replaces the default Oracle CRM On Demand Sign In page. Typically, the page is hosted on a company Web server. The URL must be fully qualified - (the URL must begin with <code>http://</code> or <code>https://</code>).</p> <p>This page is displayed after a user signs out or the user's session ends because of inactivity. It is the company's responsibility to direct their users to sign in initially using this page, rather than the default Oracle CRM On Demand page.</p>
Sign In Page for SSO Authentications	<p>The URL to a company-specific custom Sign In page, which is displayed after a user signs out, or the user's session ends due to inactivity if the user signed in to Oracle CRM On Demand originally, using Single Sign-On. Typically, the page is hosted on a company Web server - for example the company's Single Sign-On portal. The URL must be fully qualified (begin with <code>http://</code> or <code>https://</code>).</p> <p>It is the company's responsibility to direct users to sign in initially, using their SSO Sign In page, rather than the default Oracle CRM On Demand page. If a user who has signed in using SSO signs out and this setting is blank, a generic page is displayed with the message "You have been signed out."</p>
ITS URL for SSO Authentications	SAML Intersite Transfer Service URL that is used for Single Sign-On to Oracle CRM On Demand, assigned by Customer Care when Single Sign-On is configured for the company. This value cannot be changed by the company administrator.
IP Address Restrictions Enabled	See <a href="#">Restricting Use to IP Addresses</a> (on page 36).
Cross-Site Request Forgery Protection Enabled	<p>Enables a feature that prevents cross-site request forgery attacks. When this check box is selected, users who create custom code that interacts with Oracle CRM On Demand might require a security token to be included as a hidden parameter in their code. For more information about cross-site request forgery protection, see <a href="#">About Cross-Site Request Forgery Protection</a> (on page 34).</p> <p>This check box is selected by default when your company is set up to use Oracle CRM On Demand, and you cannot change the setting.</p>



Field	Description
Enable IFRAME embedding	For security reasons, this check box is deselected by default and must be selected only when required. By selecting this check box, you allow users to embed Oracle CRM On Demand pages in an iFRAME on another site's Web page. If users try to embed Oracle CRM On Demand in an iFRAME on another site's Web page, and this checkbox is deselected, the Oracle CRM On Demand page expands so that it becomes the parent page. This setting does not affect Oracle CRM On Demand widgets that you embed in desktop applications.
<b>Analytics Visibility Setting</b>	
Reporting Subject Areas	<p>Use this picklist to set the visibility for users who want to view real-time report records in Oracle CRM On Demand Answers. These reports provide real-time analyses of data. You can select one of the following values:</p> <p>Manager Visibility - Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows users to view their own data, and data shared with them by their Account and Opportunity teams.</p> <p>This company-wide setting applies unless users set a value for the Reporting Subject Areas setting in their Personal Detail page. For more information on reports, see Reports, particularly the About Visibility to Records in Reports section.</p>
Historical Subject Areas	<p>Use this picklist to set the visibility for users who want to view analytics report records in Oracle CRM On Demand Answers. These reports provide historical or trend analyses, or contain more complex calculations than those found in real-time reports. You can select one of the following values:</p> <p>Manager Visibility - Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows users to view their own data, and data shared with them by the Account and Opportunity teams.</p> <p>Full Visibility - This setting combines the views of Manager and Team Visibility.</p> <p>This company-wide setting applies unless users set a value for the Historical Subject Areas setting in their personal details. For more information on reports, see Reports, particularly the About Visibility to Records in Reports section.</p>
Role-Based Can Read All Records	Use this picklist if you want Oracle CRM On Demand Answers reporting to use the Can Read All Records setting on an object basis, as defined on the Record Type Access page within the Role management wizard. For example, if the Can Read All Records visibility setting is selected by your Administrator for your user role on a given object, (by clicking Admin, User Management and Access Controls, Role Management, then editing a role and clicking Record Type Access), you can view all records of that object in Oracle CRM On Demand Answers, provided the Role-Based Can Read All Records setting is enabled either through the Company Profile or your User

Field	Description
	<p>Profile.</p> <p>See About the Role-Based Can Read All Records Setting for guidance on when and how to enable the Role-Base Can Read all Records.</p> <p>If you do not select Role-Based Can Read All Records, then Oracle CRM On Demand Answers reporting uses the visibility set on Reporting Subject Areas and Historical Subject Areas fields.</p>
<b>Communications Settings</b>	
Auto Wrap Up	<p>If you select this setting, Oracle CRM On Demand automatically wraps up the Communication Activity when an agent ends any call or email communication, or when an agent re-assigns voicemails. The agent does not see the Wrap Up form. The activity status is set automatically to Completed and the resolution code is set to Auto Wrap Up.</p> <p><b>NOTE:</b> This setting does not apply if the agent manually clicks the Wrap Up button on a Communication Activity Detail page. For example, after listening to a voicemail, the agent can click the Wrap Up button on the Voicemail Activity Detail page, to display a Wrap Up form and wrap up the Activity.</p>
<b>Additional Information</b>	
Licensed Users, Active Users, Inactive Users	These numbers are read-only, displaying your licensed number of users along with the current status of users.

**NOTE:** Some additional fields might appear if your company has certain features turned on.

## Verifying License Statuses and Active Users

You can verify the license status and compare that to the number of active users. You need a license for each active user. (An *active user* is a user who can access the application.)

The number of licenses also determines the amount of data that the application can store for your company.

**Before you begin.** To perform this procedure, your role must include the Manage Company privilege.

### *To verify your license status and active and inactive users*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 In the Additional Information section on the Company Profile page, verify the numbers of licensed, active, and inactive users.

- If you have active users who no longer need access to the application, you can free up licenses by deactivating them. For more information on deactivating licenses, see [Deactivating Users](#) (on page 162).
- If you want to purchase more licenses, contact your Oracle CRM On Demand sales representative.

## About Sign-in and Password Policies

Oracle CRM On Demand provides the highest levels of security for your company. Security constraints have been built in to ensure that only authorized users have access to your data.

Additionally you can enforce certain sign-in, password, and authentication policies to raise the level of security within your company. For example, you can set the sign-in timeout to 15 minutes to better adhere to your corporate security policies. And if any of your users forget their password, they can receive a new one by simply answering a set of validation questions. As an added security measure, you can specify the number of hours for which an active session can last. For example, you can set up a user's active login session to last an hour. When the user reaches the active session limit and tries to perform an action within Oracle CRM On Demand, the user is forced to enter her login credentials before continuing the session.

## Security Considerations

Before you set up your sign-in and password controls, you need to carefully consider your security needs. Some of the questions you should answer are:

- What type of user ID do you want to use?
- How long do you want a user's system-generated temporary password to be valid for?
- What will be the maximum number of sign-in attempts that is allowed before a user is locked out of the application?
- How long will the sign-in lockout be for? How often do you want users to change their passwords?
- Do new passwords have to be different from old passwords?
- What is the minimum password length?
- How many security questions must be answered successfully by users to enable them to reset their password if they forget it?
- How many security questions must be answered correctly before the application automatically resets a user's password?
- Do you want to allow users to change their user IDs or email addresses?
- How long do you want a user's active session to last for?

When you have defined your sign-in and password policies, you can implement them in the Company Administration pages in the application.

## Password Setting Changes

If you make changes to the password settings, the system does not enforce the changes until the current passwords expire. For example, if you change the minimum password length from seven characters to 10 and

a user already has a seven character password, the user can use the seven character password until it expires. At that time, the user will have to create a new password of at least 10 characters.

It is best to set the internal policy and select the settings before adding new users to the system. If, however, you must make a change to your security policy immediately, you have the ability to reset all user passwords. This action generates an email to all the users in your company providing them with a new temporary password. You must have the Reset Passwords privilege to do this.

### What Happens When Users Forget Their Password?

Users who have the Reset Personal Password privilege in their role can submit a request to reset their password if they forget it. They can use the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page. You must define the minimum number of security questions and answers that users must provide to have their password reset. When this feature is set up, users can reset their own Oracle CRM On Demand password without the company administrator intervening.

### Defining Your Company's Password Controls

You can define the password policy for Oracle CRM On Demand. For example, you can set the password policy to conform to your company's protocols about how long passwords should be and how often they should expire.

#### *To define your company password controls*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Sign In and Password Control link.
- 4 On the Company Sign In and Password Control page, fill in the information, and then save the settings.

The following table describes the settings.

**NOTE:** To reset their password, users must have the Reset Personal Password privilege in their user role. To reset their password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page, users must also have security questions and answers set up in the system.

Setting	Possible Values	Usage
<b>Sign-in Policy Information</b>		
Company Sign In ID	Text box	Is a unique identifier for your company. When creating new users this identifier will be the first portion of the User Sign In Id (Company Sign-in ID) for the user. When new users are created and the Default User ID Type is Company Sign-in ID, the

		Company Domain part of the user ID is prepopulated with this value. This setting can also be accessed from the Company Profile page.
Maximum Number of Current Password Attempts	Number between 1 and 3	<p>The number of times that a user can try to enter the current password. If the user is entering the current password at the login screen when the number of attempts is reached, then the user is locked out from Oracle CRM On Demand. The Sign In Lockout Duration field value determines how many attempts are allowed. However, if the user is entering the current password from within Oracle CRM On Demand, or if the user is updating the password, and if the maximum number of current password attempts is reached, then the user's session is terminated. The user is not locked out from Oracle CRM On Demand, and the maximum number of current password attempts is still available at the login screen before Oracle CRM On Demand applies the value set in the Sign In Lockout Duration field.</p> <p>The default value for existing and new customers is 3.</p>
Sign In Lockout Duration	15, 30, 60 minutes or Forever	The length of time that the user's account is locked.
Maximum Session Duration in Hours	0-9999 hours	<p>The length of time that a user's active session can last before the user is asked to reenter his login credentials. This field accepts positive integers from zero (0) through 9999.</p> <p>To view your default value for this setting, go to the Sign In and Password Policies page in</p>

		<p>Company Administration .</p> <p>When using Oracle CRM On Demand, you must reenter your login credentials when the active session reaches its maximum duration.</p> <p>When using Web services and the active session times out, the Web Services client must reauthenticate to continue using Web services.</p>
<b>Password Control Information</b>		
Expire User Passwords In	30, 60, 90 days, one year, or never expires	The length of time that a user's password is valid. After this period has elapsed, the user is forced to change the password.
Minimum Password Length	Number between 6 and 10	The minimum number of characters that can be used for a password.
Maximum Number of Password Changes	Number between 1 and 20	The maximum number of times that a user's password can be changed as specified in the Password Change Limit Window setting. If a user attempts to change a password more than the specified number of times, the change is not allowed.
Password Change Limit Window	Number of days (from 1 to 7)	The period during which the Maximum Number of Password Changes setting applies.

Complexity Level of Passwords	3 or 4	<p>The number of character classes that must be satisfied in the user passwords from the following four categories:</p> <ul style="list-style-type: none"> <li>■ Uppercase characters (A...Z)</li> <li>■ Lowercase characters (a...z)</li> <li>■ Numeric characters (0, 1, 2...9)</li> <li>■ Nonalphanumeric characters (!,\$,#,%)</li> </ul>
Enforce Password Policy On Logon	Check box	<p>If the check box is selected, then a password policy check is enabled when users sign in to Oracle CRM On Demand. This policy check ensures that the user's password complies with the Minimum Password Length and Complexity Level of Passwords settings in Oracle CRM On Demand.</p>
Number Of Last Passwords To Prevent User From Reusing	Number between 0 and 10	<p>The number of previously used passwords that the user cannot reuse in Oracle CRM On Demand.</p> <p>The default value for new companies is 3. The default value for existing companies is 1 or 0 if the following conditions are met:</p> <ul style="list-style-type: none"> <li>■ The New Password Must Be Different Than Your Old Password setting is selected.</li> <li>■ The Number Of Last Passwords To Prevent User From Reusing setting is deselected.</li> </ul>

**Authentication Information**

Number Of Security Questions To Be Completed	Number between 1 and 8	<p>This setting determines how many security questions and answers a user must set up. The user's questions and answers are stored for future use.</p> <p><b>NOTE:</b> Users set up their security questions when they sign in to Oracle CRM On Demand for the first time. Users can also change their security questions at any time. For more information, see <a href="#">Setting Up Your Security Questions</a>.</p> <p>When users reset their password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page, they must answer a certain number of the security questions that they set up.</p> <p>You can specify that users must set up a larger number of questions than the number they are required to answer when resetting a password. A random selection of the questions the user sets up is displayed to authenticate the user when resetting the password.</p>
Number Of Security Questions To Be Answered	Number between 1 and 8	<p>This setting determines the number of security questions that a user must answer when resetting a password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page. When the user submits the request to reset the password, the user receives an email, shortly afterwards, with a link to a temporary page.</p> <p>On the temporary page, the user must answer the number of security questions specified in this setting before the</p>



		<p>password can be reset.</p> <p>The value in this field must be less than or equal to the value in the Number of Security Questions to be Completed field, because the user cannot be required to answer more questions than the user has set up.</p>
Number Of Days Temporary Sign In Is Valid	Number of days (1 to 14)	<p>This setting determines the number of days that a temporary sign-in password is valid. An email with temporary sign-in information is typically sent when a new user is added, or when the company administrator or Customer Care resets the user's password.</p>
Number Of Temporary Password Sign In Attempts	Number of attempts (1 to 14)	<p>The total number of sign-in attempts allowed using a temporary sign-in password. If this value is exceeded, the user's temporary sign in information becomes invalid, and the user must have the password reset again.</p>
<b>Additional Information</b>		
Allow Users To Change User ID	Check box	<p>If the check box is selected, users who edit their User Profile can change their User ID. If the feature is not enabled, only the company administrator can change the user IDs.</p>
Allow Users To Change Email Address	Check box	<p>If this check box is selected, then users who edit their user profile can change their email address. If this feature is not enabled, then only the company administrator can change the email addresses.</p>

Concurrent Session Option	Allow with Notification, Allow without Notification, and Prevent and Terminate Existing	<p>This setting allows you to manage how Oracle CRM On Demand handles concurrent sessions while using your login credentials.</p> <p>The option, Allow with Notification, allows you to engage in concurrent sessions. However, Oracle CRM On Demand notifies you that another session is in progress, using the same account details. Oracle CRM On Demand also provides notification to the user on the other session.</p> <p>The option, Allow without Notification, allows you to engage in concurrent sessions. However, Oracle CRM On Demand does not notify either user that the other session is in progress.</p> <p>The option, Prevent and Terminate Existing, closes the first and existing session, leaving the second and new session in progress. Users of both sessions are notified of the actions.</p>
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## About Cross-Site Request Forgery Protection

To prevent cross-site request forgery attacks, users who create custom code that contains HTTP POST requests (including Asynchronous Java Script and XML (AJAX) requests) that try to update, create, or delete data in Oracle CRM On Demand must include a security token, as a hidden parameter in their code. If the custom code does not contain the security token, or if the security token is used incorrectly, the request will fail. When the request fails, the user will see an error message indicating that the request cannot be completed, because the key is invalid or has expired, and the user must refresh the page.

The security token that users must include in their code is shown in the following table.

Parameter Component	Token Code
Name	%%%ODReqName%%%
Value	%%%ODReqValue%%%

**NOTE:** The token code is case sensitive, and must be exactly as shown in the table. Any error in the token code causes the request to fail.

This protection feature for cross-site request forgery is controlled by the Cross-Site Request Forgery Protection Enabled check box on the company profile. The feature is enabled by default when your company is set up to use Oracle CRM On Demand, and you cannot disable it.

## Resetting All Passwords

You can reset all users' passwords (including the administrator's) at one time.

**Usage example 1.** When you are setting up your application, create users and set their Status to Active, but don't email their passwords to them. After the setup is completed and the application is ready for use, reset all passwords. This action sends emails to all active users at once, notifying them of their temporary passwords and giving them access to the application.

**Usage example 2.** You have changed your password control policy and want all users to conform to the new policy. Reset all passwords so that the users must change their passwords when they next sign in.

**Before you begin.** To perform this procedure, your role must include the Manage Company - Reset All Passwords privilege. Also, each user role must include the Reset Personal Password privilege.

### *To reset all passwords*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 In the Company Profile title bar, click the Reset All Passwords button.

Emails are sent to all the users, notifying them of their new temporary passwords. Users currently signed in are able to continue working but will need to enter their new temporary passwords when they next sign in.

### Related Topics

See the following topics for related information:

- [Resetting a User's Password](#) (on page 157)
- [Setting Up Users](#) (on page 143)
- [Defining Your Company's Password Controls](#) (on page 28)

## Activating Languages

Oracle CRM On Demand is available in many languages. All default text fields supplied with the product, such as fields and picklist values, along with online help and tutorials are shown in the available languages.

However, when you customize fields or picklist values, you must manually enter the equivalents in other languages, if you want those to appear in their translated versions. Otherwise, they appear in the original language in blue text with brackets around them, regardless of the language you selected.

Initially, the only active language is the one that was selected as the company default language when your company signed up for Oracle CRM On Demand.

To make the language choices available to your users, you must activate them.

**Before you begin.** To perform this procedure, your role must include the Administer Company Profile privilege.

### *To activate languages*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Languages link.
- 4 In the Active column, select the languages you want to make available to your employees.  
**NOTE:** The formats for displaying dates, times, and currency are determined by other settings, not the Language setting.
- 5 Save the record.

## Restricting Use to IP Addresses

This feature allows your company to restrict access to the system to specific IP address ranges. You can use this feature to ensure that your users only access the system from specific network locations, such as your office. If this feature is enabled, your users can only sign in to the application from machines that have IP addresses within the range you specified.

**Before you begin.** Contact Customer Care so that they can enable the IP filtering for your company. After that, to perform this procedure, your role must include the Administer Company Profile privilege.

### *To restrict use to IP addresses*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 Click the Security Settings link.
- 4 On the Security Settings page, enter the IP addresses that are acceptable for signing in.  
**TIP:** Review the onscreen information about the correct way to enter IP addresses.
- 5 Save the record.

## Fiscal Calendar Administration

Fiscal calendar administration includes defining the start of the fiscal year and the corresponding end of the fiscal year for your company:

- [About Fiscal Calendars](#) (on page 37)
- [Defining a Custom Fiscal Calendar](#) (on page 38)

### About Fiscal Calendars

Two types of fiscal calendar are available in Oracle CRM On Demand:

- **Standard Fiscal Calendar.** If your fiscal year follows a common calendar (for example, calendar quarters, 5-4-4, 4-4-5), you can use this calendar type in your company profile.
- **Custom Fiscal Calendar.** If your company follows a different calendar, such as 4-5-4, you can define a custom fiscal calendar in Oracle CRM On Demand.

If you use either a standard fiscal calendar or a custom fiscal calendar, a fiscal year is defined once for your company. Each fiscal calendar type automatically allows you to use the defined fiscal periods in Oracle CRM On Demand.

### Standard Fiscal Calendars

Standard fiscal calendars are periods that follow a commonly defined calendar, such as a Gregorian calendar, and can start on any day of any month of the year. If you use a standard fiscal calendar in Oracle CRM On Demand, you select one of the following calendar types:

- Calendar Quarters
- 4-4-5 calendar model
- 5-4-4 calendar model

When using standard fiscal calendars, Oracle CRM On Demand automatically generates your fiscal periods up to the year 2020. You can view the settings for your standard fiscal calendar, but you cannot change them. If you want to change your calendar definition, contact Customer Care. Customer Care populates your fiscal calendar with data and specifies your calendar type when your company is being set up.

**NOTE:** Any changes made to your fiscal year definition are not reflected in Oracle CRM On Demand Reports until a full ETL (Extract, Transform, Load) is run.

#### *To view a standard fiscal calendar definition*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Profile link.
- 3 In the Company Settings section, review the following fields:
  - Fiscal Year Start Month

- Fiscal Year Start Date
- Fiscal Calendar Type

**NOTE:** When changes are made to the definition of a standard fiscal calendar, Oracle CRM On Demand updates all data in reports. However, Oracle CRM On Demand updates only future data in forecasts.

### Custom Fiscal Calendars

Custom fiscal calendars are available in Oracle CRM On Demand to accommodate companies that do not use standard calendar months or a common fiscal calendar. Your company administrator defines custom fiscal calendars. You must create a custom fiscal calendar record for each year for which you want to create business plans, objectives, forecasts, or time-based analyses in Oracle CRM On Demand. For more information on defining custom fiscal calendars, see [Defining a Custom Fiscal Calendar](#) (on page 38).

### Defining a Custom Fiscal Calendar

Your company administrator defines the fiscal calendar in Oracle CRM On Demand to conform to your company's fiscal year. Custom fiscal calendars are reflected in all reports, business plans, objectives, and user quotas.

**NOTE:** To configure the definition of the custom fiscal calendar, your role must include the Manage Company privilege.

To set up your company's custom fiscal calendars, you must do the following:

- 1 Contact Customer Care to enable the use of custom fiscal calendars for your company.
- 2 Define your company's fiscal calendars.
- 3 Verify that the custom fiscal calendar is active within your company.

**CAUTION:** After you enable the custom fiscal calendar option for your company, you cannot disable this option. It is recommended that company administrators do not enable custom fiscal calendars unless they fully understand the features of fiscal calendars in Oracle CRM On Demand.

### Custom Fiscal Calendars and Forecasts

When using custom fiscal calendars, your company's custom fiscal calendar definition is used in the generation of forecasts. Your company administrator must define custom fiscal calendar records prior to activating forecasts. Since forecasts can span more than one quarter in duration, it is possible that a forecast could include data from multiple fiscal years. Therefore, to ensure that sufficient data is available for the forecast series to be generated, a custom fiscal calendar must be created for each year your company wants to generate forecasts. In addition, your company administrator must update your forecast definition before the new custom fiscal calendar definition can be used in forecasts. If the forecast definition is not refreshed prior to the next forecast date, your forecasts are not generated. For more information on updating forecast definitions, see [Updating the Forecast Definition](#) (on page 342).

### *To define a new custom fiscal calendar*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
- 4 On the Fiscal Calendar List page, click New Fiscal Calendar.
- 5 From the menu, select the fiscal year that you require.

The name of the fiscal calendar is automatically populated in the Name field, for example, Fiscal Year 2009. This value is read-only.
- 6 Enter the following information:
  - a **Description.** Add any extra information about the custom fiscal definition. This field has a limit of 250 characters.
  - b **Fiscal Quarter 1.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
  - c **Fiscal Quarter 2.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
  - d **Fiscal Quarter 3.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
  - e **Fiscal Quarter 4.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
  - f **Additional information.** Click the calendar icon to indicate the start of the next fiscal year.

**NOTE:** A fiscal year cannot be greater than 99 weeks in length. If you enter a value for Next Fiscal Year Start that is greater than 99 weeks from the start date of the previous fiscal year, an error message prompts you to enter a correct value.
- 7 Click Save.

**NOTE:** You must create fiscal calendars in sequence, for example, you must create the fiscal calendar for 2010 before you create the fiscal calendar for 2011.

Your new custom fiscal calendar definition is not reflected in Analytics until a nightly ETL (Extract, Transform, Load) is run.

### *To view a fiscal calendar's detail*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.

- 4 On the Fiscal Calendar List page, click the name of the fiscal year for which you want to view the fiscal periods.

The Fiscal Calendar Detail page displays the individual fiscal months for the selected year and the next fiscal year start date.

**NOTE:** If you are moving from a standard fiscal calendar to a custom fiscal calendar, your previous fiscal year records appear as read-only in the Fiscal Calendar List page and all future, fiscal-year records that Oracle CRM On Demand generates are deleted. For more information on standard fiscal calendars, see [About Fiscal Calendars](#) (on page 37).

### *To edit your company's fiscal calendar*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
- 4 On the Fiscal Calendar List page, locate the fiscal calendar that you want to update, and click Edit.
- 5 Enter the new details for the fiscal calendar, and click Save.

Any changes to a custom fiscal calendar definition are not reflected in Analytics until a nightly ETL (Extract, Transform, Load) is run.

**NOTE:** If you have defined a custom fiscal calendar, you can change it by editing the existing calendar definition. However, fiscal calendars prior to the current fiscal year are read-only. You cannot delete custom fiscal calendars.

## Currency Definition

Defining currencies for your company includes:

- Activating the currencies in which your company transacts business.
- Defining currency exchange rates for your company's base currency.

For information about currency definition, see [Managing Currencies](#) (on page 40).

## Managing Currencies

To allow users to conduct and track business in any currency, you need to activate those currencies. Otherwise, the default currency set up for the company is the only option.

If your employees record transactions in other currencies, you also need to set up exchange rates between those currencies and your company's default currency. The application uses the exchange rates when rolling up revenue for reports and forecasting.

**CAUTION:** Be sure to set up exchange rates before your users enter transactions for all currencies you activate.



You can enter multiple exchange rates for any active currency. Each entry consists of the Exchange Date and an Exchange Rate for that date. In determining which exchange rate to use for a particular transaction, the application follows these rules:

## How Oracle CRM On Demand Converts Exchange Rates Between the Company Default Currency and the User's Default Currency

In this case, a company has the following currencies:

- The default currency for a company is the U.S. dollar (USD).
- This company also has additional currencies activated: the euro (EUR) and pound sterling (GBP).
- This company has defined exchange rates between USD and EUR, and between USD and GBP.
- The user enters the opportunity revenue in EUR. However, the user default currency is GBP.
- Oracle CRM On Demand performs the EUR to GBP conversion as follows:
  - It first converts the opportunity revenue to the company default currency; that is, from EUR to USD.
  - It then converts the opportunity revenue to the user's currency; that is, from USD to GBP.

## How Exchange Rates Are Applied to Forecast Rollups

In this case, the following rules apply:

- If there is an exchange rate defined for the same date as the transaction, it uses that Exchange Rate value.
- If no exchange rate is defined for the same date as the transaction but there are exchange rates defined for dates before the transaction, it uses the exchange rate with the date that is nearest to the transaction date.
- If no exchange rate is defined for the same date as the transaction and there are no exchange rates defined for dates before the transaction, it uses the next available exchange rate that has a date *after* the transaction date.

For example, if exchange rates are entered for only 5/15/2004 and 8/15/2004, then this occurs:

- For transactions prior to 5/15/2004, the 5/15/2004 rate is used.
- For transactions between 5/15/2004 and 8/14/2004, the 5/15/2004 rate is used.
- For transactions on or after 8/15/2004, the 8/15/2004 rate is used.

## How Exchange Rates Are Applied to Reports

For reports, exchange rates are applied in a more general way than for forecasting. A single exchange rate is determined for each month, and all transactions within a month use that rate. For example, for opportunities, Oracle CRM On Demand uses the Opportunity Close Date that is closest to the Exchange Rate Effective Date. For asset currency-conversions, Oracle CRM On Demand uses the Purchase Date field as the date. For opportunity products, Oracle CRM On Demand uses the exchange rate that is closest to the start date of the product revenue. For other objects, including custom objects 01-03, Oracle CRM On Demand uses the created date to determine the exchange rate date. For custom objects 04-15, Oracle CRM On Demand uses the Exchange Date field.

The exchange rate assigned to a month is determined as follows:

- If more than one exchange rate exists for a month, the one with the latest date in that month is used.
- If no exchange rates exist for a month, that month's exchange rate is set to the same rate as the closest future month that has a rate defined for it.
- If there are no exchange rates for future months, the first previous month's exchange rate is used.

For example, if exchange rates are defined for 5/10/2004, 5/20/2004, and 8/14/2004, then:

- The May 2004 rate will be the value set for 5/20/2004 (the latest rate set for May).
- The August 2004 rate will be the value set for 8/14/2004 (the only rate set for August).
- April 2004 and prior months will be assigned the rate for 5/20/2004. There are two dates for the month of May.
- June and July 2004 will be assigned the August 2004 rate (closest future month).
- September 2004 and future months will be assigned the August 2004 rate (no future month, so first previous month is used).

In reports, any values that require conversion between currencies will use the exchange rate defined for the month that the transaction falls in, calculated as described above.

**NOTE:** During forecasting, all opportunities are converted to the company default currency for forecast rollups. However, in reports, revenue fields are converted to the end user's currency amount.

You need to wait until the daily analytics refresh runs when either of these situations occurs:

- A new currency is activated for your company and the exchange rate is set up
- A new currency is selected by a user that no other user for your company has selected (on the Personal Detail page)

The refresh automatically generates any required cross exchange rates. After that, you can run historical or real-time reports.

Whenever users change their default user currency, they must sign out of Oracle CRM On Demand, and then sign in again before reports display data in the newly selected currency.

**Before you begin.** To perform the procedures for managing currencies, your role must include the Define Currencies privilege. Also, to understand the effect of currency settings, read About Profile Settings for Users.

### **To activate currencies**

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Currency Definition section, click the Currency Definition link.
- 4 On the Currency Setup page, select All Currencies from the drop-down list.
- 5 Click the Edit link for the currency you want to activate.
- 6 On the Currency Edit page, select the Active check box.
- 7 (Optional) On the Currency Edit page, you can change the symbol corresponding to the currency.

For example, you might want to distinguish currencies by their currency codes instead of by their symbols. Therefore, you would change \$ to USD, ¥ to JPY, and € to EUR.

- 8 Save the record.

### **To define the exchange rates**

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Currency Definition section, click the Exchange Rates link.

The Exchange Rate Edit page appears with the latest exchange rates for your activated currencies. If no exchange rate has been defined, it appears blank.

**NOTE:** The *To Currency* is always the currency that is set for your company. You must enter exchange rates that tell the application how to convert each active currency into that currency.

- 4 To add a new exchange rate for an active currency:
  - a Click the Exchange History link for the Currency row for which you want to add a rate.  
On the Exchange Rate page, click New.
  - b On the Exchange Rate Edit page, complete the information.  
For Exchange Rate, enter how many units of the *To Currency* it would take to buy one unit of the *From Currency*.  
Example: 1 Euro = 1.3 US dollars.  
Assuming your company's currency is set to US Dollars (USD), you would enter these values:
    - From Currency: EUR
    - To Currency: USD
    - Exchange Rate: 1.3
- 5 Click Save.

### **To view a history of exchange rates**

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Currency Definition section, click the Exchange Rates link.  
On the Exchange Rate Edit page, the latest exchange rates appear for different currencies.
- 4 To see the history of exchange rates for a single currency, click the Exchange Rate History link.  
A history of the exchange rates appears.

## Company Audit

Audit trail is an important capability for meeting regulatory and corporate policy compliance. Refer to the following topics for information about audit trail in Oracle CRM On Demand:

- [Reviewing Sign-In Activity for All Users](#) (on page 44)
- [Reviewing Your Company's Resource Usage](#) (on page 44)
- [Reviewing Audit Trail Changes with the Master Audit Trail](#) (on page 45)
- [Reviewing Audit Trail Configuration Changes](#) (on page 46)

## Reviewing Sign-In Activity for All Users

You can review the sign-in history for all the users at your company. The sign-in history page shows which of your users are using the application and when. The sign-in history page also records sign-in activity by Oracle CRM On Demand Customer Care.

**Before you begin.** To perform this procedure, your role must include the Administer Company Profile privilege.

### *To review sign-in activity for all users*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Resource Audit section, click the Sign-in Audit link.
- 4 Review the sign-in history for the application.

### Related Topics

See the following topic for related information:

- [Reviewing Sign-In Activity for a User](#) (on page 157)

## Reviewing Your Company's Resource Usage

You can review the resource usage for your entire company, including changes to these areas:

- Reset Password
- Forget Password
- Answer Security Questions
- Change SSO Identifier

- Change to User ID
- Change to Email address
- Set Password
- Initial Password
- Offline

**Before you begin.** To perform this procedure, your role must include the Administer Company Profile privilege.

#### *To review your company's resource usage*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Resource Audit section, click the Audit link.
- 4 Review the resource usage history for your company.

## Reviewing Audit Trail Changes with the Master Audit Trail

You can review the audit trail changes that users made to auditable fields for all auditable record types. An audit trail also indicates if auditable record types are created, deleted, or restored.

For new customers and those upgrading Oracle CRM On Demand to this release, if you are auditing specific fields for record types, auditing of record creation, deletion and restoration is enabled by default. If you are not auditing specific fields for record types, all auditing of record creation, deletion, and restoration is disabled. Then customers can change the record level audit settings.

**Before you begin.** To perform this procedure, your role must include the Access Master Audit Trail privilege and Admin Configuration Audit privilege.

#### *To review audit trail changes with the Master Audit Trail*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Audit section, click the Master Audit Trail link.

The Master Audit Trail displays the following values:

- **ID#.** The table row ID.
- **Title.** The name field of the object.
- **Record Type.** The record type being audited.
- **Date.** The date when the object was last audited.

- **Last Name.** The user's last name.
- **First Name.** The user's first name.
- **Field Modified.** The field modified in the object.
- **Old Value.** The previous value of the record.
- **New Value.** The new value of the field. If you change the service request priority field from Low to High, then the Old Value field remains as Low, and the New Value field is High. If you delete a record, the Old Value field remains blank, and the New Value field changes to Record Deleted.
- **Date & Time Updated.** The time and date when the record was updated.
- **Additional Information.** Any supplementary information regarding the modification of the record.

For more information about the audit trail, see [Customizing the Audit Trail](#) (on page 103).

## Reviewing Audit Trail Configuration Changes

You can review the audit trail changes that users make to field setup, roles, and access profiles.

**Before you begin.** To perform this procedure, your role must include the Access Master Audit Trail privilege and the Admin Configuration Audit privilege.

### *To review audit trail configuration changes*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Audit section, click the Admin Configuration Audit link.

The Admin Configuration Audit table displays the following values:

- **ID#.** The table row ID of the modified configuration.
- **Type.** The record type that was modified.
- **Type Name.** The record name that was modified.
- **Source IP Address.** The IP address of the computer on which the configuration change took place.  
**NOTE:** This value is displayed only when this information is available.
- **Session Type.** This value indicates if the session was interactive or a Web services session.
- **Last Name.** The user's last name.
- **First Name.** The user's first name.
- **User Sign In ID.** The user's login ID.
- **Operation.** The type of configuration that was performed, for example, created, deleted, or modified.
- **Field Modified.** The field name of the record that was modified.

- **Old Value.** The previous value of the record or field that was modified.
- **New Value.** The new value of the record or field that was modified.
- **Date.** The time and date when the record was configured.

For more information about the audit trail, see [Customizing the Audit Trail](#) (on page 103).

## Alert Management

The alert functionality in Oracle CRM On Demand enables you to broadcast time-based, critical information to your company users. For information about alerts, see the following topics:

- [Reviewing Your Alerts](#)
- [Publishing Company-Wide Alerts](#) (on page 47)
- [Working with Lists](#)
- [Alert Fields](#) (on page 48)

## Publishing Company-Wide Alerts

Company-wide alerts appear on each employee's My Homepage. You can use alerts to broadcast company-wide information, such as meeting notices and policy changes.

**NOTE:** Alerts announcing that a forecast has been generated remain on the employees' My Homepage for two days. To extend the period the alert appears, make the changes on the Alert Edit page after the alert first appears. For instructions, follow the procedure in this section.

You can link files or URLs to alerts. For example, when creating a meeting notice alert, you can add a link to a Web page with directions to the meeting location.

**Before you begin.** (Optional) Create or locate a Web page or file that contains information you want to share. Make sure that the path to the Web page or file is accessible to your users. To perform this procedure, your role must include the Administer Company Profile privilege.

### *To create or update company-wide alerts*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Alert Management section, click the Company Alerts link.

The Alerts page appears with a list of company alerts.

- 4 On the Alerts page, do one of the following:
  - Click the New button.
  - Click the title of the alert you want to edit, and then click the Edit button.
- 5 On the New Alert or Alert Edit page, complete the required information.
- 6 Save the alert.
- 7 To add an attachment to the alert, click the alert title on the Alerts list page to open the alert details.
- 8 Click the Add Attachment button, and enter the information.
- 9 On the Attachment Edit page, click Save.
- 10 To add a URL to the alert, click the alert title on the Alerts list page to open the alert details.
- 11 Click the Add URL button, and enter the information.
- 12 On the Attachment Edit page, click Save.

## Alert Fields

The following table describes the field information you might see in an alert record. If you are an administrator, you can see and update all alert fields. Otherwise, you are restricted to viewing a limited number of alert fields.

Field	Description
Title	Title of the alert as it will appear on My Homepage.
Priority	Priority of the alert, which is indicated by the icon next to it on My Homepage.
Hyperlink	URL or filename and directory path associated with the alert.
Alert Description	Text as it will appear in the alert.
Post Date	Date you want the alert to begin being broadcast across My Homepage.
Expiration Date	Date you want the alert to end being broadcast across My Homepage.
Displayed Hyperlink	Text as it will appear for the hyperlink in the alert. This is required if you have entered a hyperlink.  For example, for the Link (URL) "http://company.site/doc_2389.html", you might type "Directions to meeting" for the hyperlink text in the alert.

**TIP:** You can create filtered lists to limit the type of alert records displayed at one time. For instructions, see [Working with Lists](#).

## Related Topics

See the following topic for related information about company-wide alerts:

- 48 Administering Oracle CRM On Demand Release 20



- [Publishing Company-Wide Alerts](#) (on page 47)

## Service Allotment Administration

Administering service allotments includes:

- [Viewing Service Allotment Usage for Your Company](#) (on page 50)
- [Viewing Historical Service Allotment Usage](#) (on page 51)
- [Setting Alerts for Service Allotments](#) (on page 52)
- [Viewing File and Record Utilization Information](#) (on page 52)

## About Service Allotments

You can view all of the service allotments for your company to see the current and historical usage and to enable alerts when allotments reach the defined threshold values. Customer Care sets the service allotment values for your company. The service allotments are as follows:

- **Web Services Operations Allotment.** Determines the number of Web services operations that a company can perform within a 24-hour period.
- **Web Services Concurrent Request Allotment.** Determines the maximum number of concurrent Web service requests that a company can process.
- **CRM Desktop Licenses.** Indicates the number of CRM Desktop users licensed by your company.
- **File Allotment.** Determines the file allotment for the company, which is the amount of storage available for files attached to records.
- **Record Allotment.** Determines the record allotment for the company, which is the number of records of all types.

**NOTE:** The names and descriptions of service allotments are displayed in your active language.

In the Service Allotment List page, you can see the defined allotment value, the current usage, and the remaining usage values. You can drill down on a service allotment to set an alert for the service allotment. When you enable an alert, you define a threshold value on a service allotment, which causes an email warning to be sent to the specified recipients when the threshold is reached.

In the Allotment Usage List page, you can track your company's usage against service allotments over time. You can view, daily, weekly, or monthly usage, although this view varies with the allotment type. You can export the allotment data and allotment usage data for a company, using the Export Assistant. For information about using the Export Assistant, see [Exporting Your Data](#) (on page 539).

## What Happens When Allotments Are Fully Used?

When usage reaches the total company limit for Web services allotments, further requests to Oracle CRM On Demand Web services are not processed. Allotment capacity is released hourly, and the amount of capacity released varies depending on past usage. New requests will be processed when the current usage for the preceding 24-hour period has fallen below the allotment value for your company.

To avoid reaching the total company allotment, optimize Web service clients to avoid unnecessary requests. For more information, see [Oracle Web Services On Demand Guide](#).

When usage reaches the total company limit for the Record allotment, the following can no longer interact with the Oracle CRM On Demand application:

- Web services that are attempting Insert, Update, or InsertOrUpdate operations on records
- Imports using the Import Assistant or Oracle Data Loader On Demand
- Desktop clients, such as Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand

To avoid reaching the total company allotment, users can delete any records from the application that are no longer necessary. When usage reaches the total company limit for the file allotment, users can no longer upload attachments using the following:

- The Oracle CRM On Demand application
- Web services
- Any desktop clients

To avoid reaching the total company allotment, users can delete any attachments that are no longer necessary.

**NOTE:** For all service allotments, users can contact their sales representative and purchase additional capacity, additional licenses, or both. For further assistance, contact Customer Care.

## Viewing Service Allotment Usage for Your Company

You can view the following data for each service allotment for your company:

- The allotment name
- The allotment type
- The allotment units
- The value set for the allotment by Customer Care
- The amount of the allotment currently used
- The amount of the allotment remaining
- Whether an alert is enabled for the allotment. If the current usage exceeds the threshold value, an email alert is sent to the defined recipients.
- The user who last modified the allotment data

From the Service Allotment List Page, you can drill down on a service allotment to see more information about the allotment, for example, a description of the allotment, and current usage data in the Allotment Usages applet.

On the Allotment Usage List page, you can see the historical usage data about an allotment. For more information, see [Viewing Historical Service Allotment Usage](#) (on page 51).

You can click Edit on the Service Allotment List page and then set an alert for an allotment. For more information, see [Setting Alerts for Service Allotments](#) (on page 52).

**To view your company's service allotment usage**

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Service Allotment Administration section, click the Service Allotment Administration link.
- 4 In the Service Allotment List page, view the service allotment data for your company.

**Viewing Historical Service Allotment Usage**

From the Allotment Usage List page, you can review historical usage data about the allotments for your company. By default, the allotment usages are listed by date, and the period, allotment type, allotment name, allotment units, allotment used, and created date are displayed. You can view allotment usages for daily, weekly, or monthly periods, although this view varies with the allotment type.

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

To do this	Follow these steps
Create a new list of allotment usages	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in Creating and Refining Lists.
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists.
Manage allotment usages lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in Creating and Refining Lists.
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page.
Sort the allotment usages in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records that you want to see at one time.

## Setting Alerts for Service Allotments

You can set an alert for a service allotment so that when the allotment usage reaches a certain threshold value, an email is sent to notify specified users. If alerts are enabled for a service allotment, the following defaults apply:

- **Alert Recipients.** The email address of the primary contact for the company
- **Alert Threshold.** Seventy percent of the allotment value

For existing customers, alerts are disabled by default. For new customers, alerts are enabled by default.

**Note:** You cannot set an alert for the Web Services Concurrent Request allotment.

In addition to the threshold alert, an automatic alert email is sent to either the primary contact or the specified email recipients when current usage reaches a company's allotment value. If alerts are enabled, then the email indicating that the allotment has been reached is sent to the specified recipients.

### *To set an alert for a service allotment*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Service Allotment Administration section, click the Service Allotment Administration link.
- 4 In the Service Allotment List page, click Edit.
- 5 In the Service Allotment Edit page, complete the following fields:
  - **Alert Recipient.** Enter the email addresses of the users who will receive a warning email.
  - **Alert Threshold.** Enter the percentage of the allotment value at which the alert email will be sent.
  - **Alert Enabled.** Select this check box to enable the sending of alert emails.

## Viewing File and Record Utilization Information

At intervals, Oracle CRM On Demand takes a snapshot of the amount of file and record storage that your company is using. The information is kept for 90 days, after which it is purged from the database. To help you to keep track of the amount of file and record storage that your company uses, you can view details about the following:

- The number of file attachments that were stored when the snapshot was taken
- The amount of file storage that was used by your company when the snapshot was taken
- The number of records that existed for your company when the snapshot was taken

**NOTE:** Files and records that were deleted but not purged from Oracle CRM On Demand are not included in the calculation of file and record utilization.

The following procedure describes how to view file utilization information.

**To view file utilization information**

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Service Allotment Administration section, click File Utilization to open the File Utilization List page.

By default, the File Utilization List page displays the Current File Usage list. The Current File Usage list shows the information from the most recent snapshot. If you want to view the information from all of the snapshots taken over the last 90 days, select the All File Usage list in the title bar of the list page.

The following table describes the information shown on the File Utilization List page.

Column Name	Description
Record Name	The name of the record type as it appears in the user interface. If your company customized the name of the record type, the customized record type name appears in this column.  <b>NOTE:</b> If no files were attached to the records of a given record type for your company when the snapshot was taken, then the record type is not listed.
Number of Files	The number of files that were attached to the records of the listed record type for your company in Oracle CRM On Demand when the snapshot was taken.
File Allotment Used (MB)	The amount, in megabytes, of file storage used by your company in Oracle CRM On Demand to store file attachments for records of the listed record type when the snapshot was taken.
Date	The date and time of the snapshot.

The following procedure describes how to view record utilization information.

**To view record utilization information**

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Service Allotment Administration section, click Record Utilization to open the Record Utilization List page.

By default, the Record Utilization List page displays the Current Record Usage list. The Current Record Usage list shows the information from the most recent snapshot. If you want to view the information from all of the snapshots taken over the last 90 days, select the All Record Usage list in the title bar of the list page.

The following table describes the information shown in the Record Utilization List page.

Column Name	Description
Record Name	The name of the record type as it appears in the user interface. If your company customized the name of the record type, the customized

Column Name	Description
	record type name appears in this column.  <b>NOTE:</b> If no records existed for a given record type for your company when the snapshot was taken, then the record type is not listed.
Record Allotment Used	The number of records of the listed record type that existed for your company in Oracle CRM On Demand when the snapshot was taken.
Date	The date and time of the snapshot.

**TIP:** For information about using the menu options on the File Utilization List page and the Record Utilization List page, see [Working with Lists](#).

## Address Administration

Address administration includes turning the address-sharing functionality on or off (using the Enable Shared Addresses setting in the company profile), enabling address validation (using the Validate Shared Addresses setting in the company profile), converting unshared addresses to shared addresses, and other tasks. For more information about address administration, see the following topics:

- [Converting Unshared Addresses to Shared Addresses](#) (on page 54)
- [Considerations When Turning Off Shared Addresses](#) (on page 57)
- [Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses](#) (on page 58)
- [Setting the Address Type for Unshared Addresses Using Edit Rel](#) (on page 59)
- [Access Profile and Role Settings for Addresses](#) (on page 60)

## Related Topics

- [Addresses](#)
- [Setting Up Your Company Profile and Global Defaults](#) (on page 16)

## Converting Unshared Addresses to Shared Addresses

Release 19 and earlier releases of Oracle CRM On Demand used unshared addresses. You can continue to use unshared addresses in this release. However, if you want to convert unshared addresses from earlier releases to shared addresses that are supported in this release, then you must complete the following procedure.

**Note:** If the data files are large and the import operations take longer than you expect, then you can use Oracle Data Loader On Demand with the same input files and mapping files that are defined in this procedure.

**Before you begin:** It is assumed that Oracle CRM On Demand Customer Care has upgraded your company to the current release. To complete this procedure, you must be a company administrator who can perform import and export operations and customize Oracle CRM On Demand. You require the Manage Addresses privilege to enable shared address functionality.

**NOTE:** When moving to shared addresses from unshared addresses, you must use the Web Services v2.0 API for all Web services requests because the Web Services v1.0 API does not support access to shared addresses.

### *To convert unshared addresses to shared addresses*

- 1 If required, deselect the Enable Shared Addresses setting in the company profile.
- 2 Export the data from the address-related objects that you want to convert to shared addresses.

The list includes the following items:

- All account data sections including:
  - Accounts
  - Account Addresses
  - Contacts
  - Account Partners
  - Addresses
- All contact data sections including:
  - Contacts
  - Contact Addresses
  - Accounts
  - Addresses
- All dealer data sections including:
  - Dealer
  - Dealer Addresses
- All partner data sections including:
  - Partner
  - Partner Addresses
- All address data

This export operation must export all the relevant account, contact, partner, dealer, and address data from Oracle CRM On Demand to an external file. You must be able to use the external file with the data correction and standardization method that you choose.

- 3 Correct and reformat the data so that importing these addresses into Oracle CRM On Demand does not contain duplicate data and so that the account, contact, dealer, and partner data is set up with the associated addresses.

Many duplicate and invalid addresses will probably exist after the export operation. For example, because addresses were not shared in earlier releases, contacts residing at the same location might have identical or similar addresses. However, minor differences might arise because of typing and other errors. For the duplicate addresses that are likely to occur, reimporting the records (for example, accounts) and associating them with newly created shared address records will not delete

the preexisting address associations from the earlier release. Consequently, you must do the following:

- Verify your data and then remove duplicate records when preparing the address data that you want to import.
- Take ownership for the preexisting unshared address data associated with your account, contact, dealer, and partner records if you decide to associate those records with the shared address version of the address data. That is, you must account for, remove and disassociate, and choose whether to retain the preexisting unshared address data.

For information on preparing the data for import, see the following topics:

- [Address Fields: Import Preparation](#) (on page 406)
- [Account Fields: Import Preparation](#) (on page 396)
- [Contact Fields: Import Preparation](#) (on page 428)
- [Dealer Fields: Import Preparation](#)
- [Partner Fields: Import Preparation](#) (on page 494)

#### 4 Import the address record data:

- a Choose the import file name with the address data and the appropriate mapping file.
- b Allow the import to complete.

Importing the shared Address top-level record data is a prerequisite for importing account, contact, dealer, and partner record data. For information on importing data, see [Importing Your Data](#) (on page 533).

#### 5 Import the account record data:

- a Choose the option to create associated records.
- b Allow the import to complete.

This import creates the accounts and associates the shared addresses with the accounts. For information on importing data, see [Importing Your Data](#) (on page 533).

#### 6 Import the contact record data:

- a Choose the option to create the associated records.
- b Allow the import to complete.

This import creates the contacts and associates the shared addresses with the contacts. For information on importing data, see [Importing Your Data](#) (on page 533).

#### 7 Import the dealer record data:

- a Choose the option to create the associated records.
- b Allow the import to complete.



This import creates the dealers and associates the shared addresses with the dealers. For information on importing data, see [Importing Your Data](#) (on page 533).

**8** Import the partner record data:

**a** Choose the option to create the associated records.

**b** Allow the import to complete.

This import creates the partners and associates the shared addresses with the partners. For information on importing data, see [Importing Your Data](#) (on page 533).

**9** Confirm that the data has been imported correctly.

**10** Set up the page layouts for the appropriate roles in your company, and assign the appropriate access to the page layouts for users.

**11** Update your users' roles to include the Record Type Access role in step 2 of the Role Management wizard.

If you do not complete this step, then users cannot view address records. For example, if they attempt to associate an address record with an account, then an error message is displayed.

**12** Select the Enable Shared Addresses setting in the company profile to enable shared addresses.

**13** If your company uses applications that are external to Oracle CRM On Demand to mark addresses as valid, and if you want to use only those validated addresses in address picklists, address searches, and address associations, then select the Validate Shared Addresses setting in the company profile.

**NOTE:** The Validation Date in an address record must be set to mark the address as validated. For more information, see [Marking Shared Addresses as Validated](#).

**14** (Optional) After you have verified that the imported data is correct, you can delete the preexisting unshared address data by using Web services.

For more information about Web services, see Oracle Web Services On Demand Guide.

## Considerations When Turning Off Shared Addresses

If you turn off shared addresses after having turned it on, then the addresses created from that point onwards are unshared addresses. That is, any new address created for an account, contact, dealer, or partner is created only for that record and is not shared with other records. However, the address records that were previously shared among account, contact, dealer, or partner records continue to be shared until they are edited. For example, if you have three accounts (A, B, and C) that share an address, after turning off shared addresses, then the address continues to be shared for the three accounts. If a user edits an address, for example, Account A, then Oracle CRM On Demand creates a new, unshared address record for Account A, but Accounts B and C continue to use the shared address until these addresses are also edited.

**NOTE:** Before turning off shared addresses you must remove access to address records for end users at your company, remove the Manage Addresses privilege from their user roles, and reset page layouts as required. For information on the procedure to remove this access and privilege, see [Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses](#) (on page 58).

The following considerations apply when turning off shared addresses after this feature was turned on:

- **The company administrator has access to the customization pages.** The company administrator who has the Manage Addresses privilege continues to have access to the Oracle CRM On Demand customization pages and can continue to work with the address layouts, field management, and so on.
- **Users can create a new unshared billing or shipping address.** Users who create a new account, dealer, or partner can create a new unshared billing or shipping address, or both. Users who create a new contact can create a new unshared primary contact address. The new address is associated only with the newly created record, and it is not available on the top-level Address tab.
- **Users can edit only the address.** Users who edit an account, contact, dealer, or partner can edit only the address for that account, contact, dealer, or partner record because shared addresses are turned off. If the address record that is being edited was previously a shared address, then Oracle CRM On Demand creates a new address that is associated only with the edited record, and the address is not available on the top-level Address tab. If the address record that is being edited was not previously a shared address, then the address is edited, but Oracle CRM On Demand does not create a new address.
- **Orphan deleted addresses might be created.** Removing a billing or shipping address from an account, dealer, or partner results in an orphan, deleted address for the account, dealer, or partner. Similarly, removing a primary address from a contact results in an orphan, deleted address for the contact.

For information about turning off shared addresses, see the information on the Enable Shared Addresses setting in [Setting Up Your Company Profile and Global Defaults](#) (on page 16).

## Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses

Before turning off shared addresses, company administrators must do the following:

- Modify users' access to address records to read.
- Remove the Manage Addresses privilege from user roles

**Before you begin.** You must be a company administrator who can use the Access Profile Wizard and the Role Management Wizard.

### *To update user access profiles before turning off shared addresses*

- 1 Set the access level for the Address record type as follows:
  - a Click Admin, User management and Access, and then Access Profile.
  - b Click the Edit menu item for the access profile for your users.
  - c In Step 2 of the Access Profile Wizard, set the access level for the Address record type to Read, and click Finish.
- 2 Turn off the Manage Addresses privilege as follows:
  - a Click Admin, User management and Access, and then Role Management.
  - b Click the Edit menu item for the role name for your users.

- c** In Step 4 of the Role Management Wizard, deselect the Manage Addresses privilege.
- 3** Sign out of Oracle CRM On Demand, and then sign in to Oracle CRM On Demand to ensure that the changes take effect.
- 4** Turn off the Enable Shared Addresses setting in the company profile as follows:
  - a** Click Admin, Company Administration, and then Company Profile.
  - b** Deselect the Enable Shared Addresses setting.
  - c** Sign out of Oracle CRM On Demand, and then sign in to Oracle CRM On Demand to ensure that the change takes effect.

For more information about specifying access level types by using the Access Profile Wizard, see [Specifying Access Levels for Primary Record Types](#) (on page 203). For more information about specifying privileges for a user's role by using the Role Management Wizard, see [Role Management](#) (on page 204).

## Setting the Address Type for Unshared Addresses Using Edit Rel

You can set the address type for an unshared address by using the Edit Rel (Edit Relationship) menu item on the record-level menu for an unshared address. The Edit Relationship feature enables a company administrator to customize aspects of the address records (for example, field and page layouts) without having the shared address functionality enabled for users.

The following are some of the characteristics of the Edit Rel menu item:

- In the default Edit page, all fields are read-only except for the Address Type field. Other custom fields that are not read-only might be available on the Edit page if it has been customized.
- If the Enable Shared Addresses setting is selected, then the Edit Rel menu item is unavailable on the record-level menu for the Addresses section. In this case, a user can use the Edit page to edit the Billing, Shipping, or Primary settings and can select a different address.
- If the Enable Shared Addresses setting is deselected, and the user has the Manage Addresses privilege and the Has Access permission to the top-level Address record, clicking New or Edit on the record-level menu on the Addresses section takes the user to the top-level Address new or edit view.

**Before you begin.** The Enable Shared Addresses setting is deselected, and the Manage Addresses privilege is selected.

### *To set the address type for unshared addresses by using the Edit Rel menu item*

- 1** In the Detail page for an account, contact, dealer, or partner record, navigate to the Addresses related information section.
- 2** From the record-level menu, choose Edit Rel.
- 3** From the picklist for the type, select the address type.

The following are the address types that are available by default: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic.

## Access Profile and Role Settings for Addresses

For access to the top-level address records and to shared addresses in accounts, contacts, dealers, and partners, you must have the appropriate settings in your access profile and user role. As the company administrator, you assign the access to specific roles for each of these records in a user's access profile.

You can assign the following access levels for the many-to-many relationship for shared addresses:

- For top-level address records:
  - ReadOnly
  - Read/Edit
  - Read/Edit/Delete
- For address records in the Addresses related information section in accounts, contacts, dealers, and partners:
  - No Access
  - ReadOnly
  - Read/Create
  - Read/Create/Edit
  - Read/Edit
  - Read/Edit/Delete
  - Full

## Privileges and Settings That Control Access to Shared Address Functions

The following privileges and settings control access to the following shared address functions:

- **Manage Addresses privilege.** Controls a user's access to the Address field set up pages, and the availability of the Address record in the Access Profile and Role Management wizards.
- **Validate Shared Addresses privilege.** Controls whether a user can validate an address by setting the validation date.
- **Enable Shared Addresses setting.** Controls whether top-level Address records can be shared, and whether addresses in account, contact, dealer, and partner records use the shared or unshared functionality.

If the Enable Shared Addresses setting is deselected and the Manage Addresses privilege is selected, then only unshared address functionality is available in account, contact, dealer, and partner records. This option is accessible in the company profile by users with the Manage Company privilege.

- **Validate Shared Addresses setting.** Controls whether Oracle CRM On Demand validates the shared addresses in a company. If this setting is selected, then users can select validated shared addresses to add to an account, contact, dealer, or partner record. Nonvalidated addresses are filtered from accounts,

contacts, dealers, or partners, and the New address button is disabled in these records. This setting is accessible in the company profile by users with the Manage Company privilege.

When the Validate Shared Addresses setting is deselected, all addresses are available in accounts, contacts, dealers, or partners; that is, no filtering takes place and the New address button is enabled in these records for users with the necessary privileges.

The following table summarizes whether various settings and privileges are required to perform shared address tasks, and their relationship to the shared address functions.

Task	Enable Shared Addresses Setting	Manage Addresses Privilege	Minimum Required Shared Address Rights	Validate Shared Addresses Privilege
Customizing the Address pages and fields for shared addresses	No	Yes	None	No
Changing the address format in accounts or contacts from <i>unshared</i> to <i>shared</i>	Yes	No	None	No
Validating shared addresses	No	No	Read/Edit	Yes
Updating the access profile for shared addresses	No	Yes	None	No
Sharing an address between accounts, contacts, dealers, or partners	Yes	No	Read	No
Enabling address records in the Role Management wizard	No	Yes	None	No
Accessing the Address tab	No	No	Read	No
Accessing the Address Homepage, Detail, and Edit pages	No	No	Read Edit Access is required for Edit pages.	No
Updating the Account Addresses, Contact Addresses, Dealer Addresses, or Partner Addresses sections in the corresponding records	Yes	No	Read	No

## Application Customization

Your company probably has specific requirements for how data is gathered and recorded, what terminology is used, and how information needs to be presented so that employees have what they need to be productive. Application customization lets you customize Oracle CRM On Demand to meet your company requirements, including page layout, field management, and list access requirements.

The following examples illustrate some ways in which you can customize the application:

**Example 1:** You might want all of your sales representatives to include an email address on all of their contact records. The best way to make sure that this requirement is met is to make the Email field a required field. Then, anyone who creates a new contact record cannot save it unless it includes an email address.

**Example 2:** You have two groups of employees that each need to track different information on an account page. You can meet this requirement by creating a different account page layout for each group and providing the appropriate access through role assignment.

The Application Customization page has two sections:

- **Record Type Setup.** Contains links for each of the top-level record types. When you click a link, you are taken to a record-type-specific customization page. Depending on your company setup, industry-specific record types might not be visible within Oracle CRM On Demand. Also, industry-specific records might require customization according to your company's specific needs. For more information on the tasks that you can perform from the individual application customization pages, see [Record Type Application Customization Page](#) (on page 63).
- **Application Setup.** Contains links to various customization functions that are not specific to a record type. Click a topic to see step-by-step instructions for the procedures available from the Application Setup section:
  - [Displaying External Web Pages in Tabs](#) (on page 110)
  - [Creating and Managing Action Bar Layouts](#) (on page 118)
  - [Creating Custom Web Applets](#) (on page 113)
  - [Creating Global Web Applets](#) (on page 119)
  - [Uploading Client Side Extensions](#) (on page 122)
  - [Customizing My Homepage for Your Company](#) (on page 125)
  - [Enabling Custom Reports in My Homepage](#) (on page 129)
  - [Renaming Record Types](#) (on page 130) and [Adding Record Types](#) (on page 132)
  - [Changing the Icon for a Record Type](#) (on page 132)

**NOTE:** For the [My Homepage Layout](#) and [My Homepage Custom Report](#) functions, your role must include the [Administer Homepage Customization](#) privilege.

### Before you begin:

- To perform the application customization procedures, your role must include the [Customize Application](#) privilege.
- Make sure you understand your business needs:
  - Talk with your business owners to understand their business processes and needs for the application.

- Determine the fields, display names, values for picklists, and other custom fields required to support their needs.
- Determine how the fields should be laid out on the interface and what fields must be marked as required.
- Use the Field Setup and Page Layout templates, available in the Tools and Templates area of the Training and Support Center, to help you document your application customization requirements.

## Record Type Application Customization Page

For each record type there is an Application Customization page with links for customization tasks that you can perform for that record type.

The following table describes each of the possible sections on an Application Customization page, and lists the tasks that you can perform when you click the links in that section. The sections displayed depend on the record type and some sections are visible only if your role includes a particular privilege. For all customization procedures, the Customize Application privilege is required.

**Note:** In the topics referenced in the following table, a placeholder for the name of a record type is indicated by the words, *record type*, in italics. For example, if you are working on accounts, replace *record type* with *account* in the following text: click the *record type* Field Audit Setup link.

Section	Tasks	Additional Privilege Required
Field Management	Renaming fields, creating custom fields, managing picklist values, specifying default values for a field, setting up field validation, and selecting whether a field can be copied or not. For more information about these tasks, see:  <a href="#">About Field Management</a> (on page 65) <a href="#">About Custom Fields</a> (on page 72) <a href="#">Creating and Editing Fields</a> (on page 75) <a href="#">Administering the Copy Enabled Setting</a> (on page 79) <a href="#">Renaming Fields</a> (on page 83) <a href="#">Using Indexed Custom Fields</a> (on page 84) <a href="#">Changing Picklist Values</a> (on page 87) <a href="#">Reverting Settings to Defaults</a> (on page 86)	None
	Advanced defining of default fields and field validation	Advanced Field Management
Page Layout Management	Creating and managing static page layouts. For more information about	None

Section	Tasks	Additional Privilege Required
	<p>these tasks, see:</p> <p><a href="#">Customizing Static Page Layouts</a> (on page 89)</p> <p><a href="#">Customizing Related Item Layouts</a> (on page 89)</p> <p><a href="#">Renaming Field Section Titles</a> (on page 93)</p> <p>Creating and managing Web applets that can be used on Detail page layouts; see:</p> <p><a href="#">Creating Web Applets</a> (on page 94)</p> <p>For information about advanced page layout management, see <a href="#">Specifying Dynamic Page Layouts</a> (on page 107).</p>	
Cascading Picklists	<p>Defining and managing cascading picklists. For more information about these tasks, see:</p> <p><a href="#">Defining Cascading Picklists</a> (on page 95)</p>	None
Search and List Layout Management	<p>Specifying targeted search fields and managing layouts for search results. Also, managing the behavior of the Lookup Windows that are used with smart associations. For more information about these tasks, see:</p> <p><a href="#">Managing Search Layouts</a> (on page 96)</p>	None
List Access and Order	<p>Managing default list access and the display order for each role. For more information about these tasks, see:</p> <p><a href="#">Managing List Access and List Order</a> (on page 100)</p>	None
Homepage Layout Management	<p>Creating and managing Homepage layouts and specifying custom reports to be displayed on the Homepages. For more information about these tasks, see:</p> <p><a href="#">Creating Record Homepage Layouts</a> (on page 102)</p> <p><a href="#">Creating Homepage Custom Reports</a> (on page 100)</p>	Customize Application – Manage Homepage Customization



Section	Tasks	Additional Privilege Required
Field Audit Setup	Customizing the field audit trail for your company. For more information about these tasks, see: <a href="#">Customizing the Audit Trail</a> (on page 103)	Administer Field Audit  This feature is available only for certain record types.
Dynamic Layout Management	Creating and managing dynamic page layouts. For more information about these tasks, see: <a href="#">Specifying Dynamic Page Layouts</a> (on page 107)	Customize Application - Manage Dynamic Layouts

For some record types, the Field Management and Page Layout sections contain links for that record type and also links for the related record type. For example, the Account Application Customization page contains links for the following:

- Account Field Setup
- Account Contact Field Setup
- Account Partner Field Setup
- Account Relationship Field Setup
- Account Team Field Setup

## About Field Management

In Oracle CRM On Demand you can perform the following field management tasks for the different record types:

- [Creating and Editing Fields](#) (on page 75)
- [Renaming Fields](#) (on page 83)
- [Changing Picklist Values](#) (on page 87)

When you create custom fields or edit field definitions, you can specify default values for the field that take effect when new records are created. You can also specify that field validation is performed for the field to ensure that it has a particular value.

## About Copying Fields

Most record types in Oracle CRM On Demand have a copy function; that is, users can copy the current record they are using. When a user clicks the Copy button on the Record Detail page, it opens a new record page. This new Record Page contains all the fields that can be copied. A user can change and save these fields.

**NOTE:** When you use the Copy button, only the base record is copied, but not the related item for child records.

The following restrictions apply when using the copy function:

- Web links, system fields, address fields, calculated and reference fields cannot be copied. The Copy Enabled check box is unavailable for these items.
- Read-only fields cannot be copied. Read-only fields are fields that are set as read-only in the field setup or in fields layout.
- Fields that are unavailable on a user's form layout cannot be copied.
- The following attachment fields cannot be copied:
  - Attachment
  - Attachment: File Name
  - Attachment: Size (In Bytes)

You can copy fields by using the Copy button in record detail pages in Oracle CRM On Demand. You can enable this setting by using the Copy Enabled check box in the Field Management page of the Application Customization section of Oracle CRM On Demand. For more information on specifying which fields can be copied in Oracle CRM On Demand, see [Administering the Copy Enabled Setting](#) (on page 79).

## About Field Validation

When you create custom fields or edit field definitions, you can specify in the Field Edit page that fields are required or read-only. You can also specify predefault or postdefault values on new records.

### Required Fields

There are various situations where you might define fields as required. For example, your company might require that every service request must track information on the cause of a service request. In this case, you specify that the Cause field for service requests is required. Then, when a record is created or updated, and saved, the application validates that the Cause field is NOT NULL.

As another example, your company might have a business policy that if an opportunity is lost, which had an expected revenue of \$100,000 or greater, the reasons for losing must be tracked. In this case, you define the Reason field on Opportunity as required only when the Revenue field has a value greater than 100,000. When an Opportunity record is saved, the application validates that the Request field's value is greater than 100,000.

If a validation fails, an error message is displayed, warning users to enter a value for the required field before saving the record. You can also specify a custom error message (in the Field Validation Error Message field) to be displayed if the validation fails.

When you specify a field as Required, the validation is enforced through all interfaces, including the user interface, Web Services, and data import.

The fields specified as required in the Field Edit page, are required fields for all users, regardless of their role. If you need to make a field required only for a specific role, you can do so by editing the appropriate page layout for fields that are not already required fields. For more information, about editing page layouts, see [Customizing Static Page Layouts](#) (on page 89).

### Read-Only Fields

The following are situations in which you might define fields as read-only:

- **Fields from external sources.** If your company tracks, for example, the credit rating of an account in an external system, it is likely that you want the credit rating to be updated regularly through a nightly import, but only want the field to be read-only in the UI.
- **Moving an existing field to a custom indexed field.** If you want to use one of the index custom fields for an existing custom field, you can specify that users can have read-only access only to the old field while you move data to the new index field. This field definition avoids data becoming out of sync.

### Custom Field Validation Rules

You can use Oracle On Demand Expression Builder (Expression Builder) to create expressions for custom field validation rules. You can click the *fx* icon next to the Field Validation field to open the Expression Builder window in which you can enter an expression. For information about the syntax you can use for expressions, see [Expression Builder](#) (on page 588).

The following are situations in which you might define custom field validation rules:

- **Enforcing business policy.** For example, if your company has a business policy that an MDF cannot be effective for more than one year, you can define a validation rule on an End Date field to ensure that the field value is never more than one year from the Start Date.
- **Enforcing data format.** For example, if your company uses a value-added tax (VAT) number on a European account, you can specify that validation of the correct VAT format, based on an account's billing address. As another example, you might specify that the value for a specific custom field is no more or no less than four digits long.

The following circumstances prevent a field validation expression from being evaluated:

- A field is left blank when the record is created. Field validation does not force a value to be required.
- A field has a pre-existing invalid value, and it is not changed when it is updated.

If a validation expression is not evaluated, or if a validation expression evaluates to NULL, no error message is generated. An error message is generated only when the validation expression fails (that is, the expression evaluates to FALSE).

Field validation expressions assume that the first parameter is the field name itself. If, for example, you are putting a simple field validation expression on an Amount field to specify that the value must be greater than 1000, it is sufficient to enter >1000. You do not need to enter [*<Amount>*]>1000. For more information on more complicated expressions, see [About Expressions](#) (on page 591).

### Restrictions on Specifying Field Validation Rules

You cannot specify field validation rules for these types of fields:

- System fields
- Internal calculated fields
- RowID and ID fields

**NOTE:** Remember that Row\_ID is an internal system field. Depending on the operation transitions, for example, during record creation, it is not always guaranteed to remain static. It can differ to ExternalSystemID or the IntegrationID.

- Associated fields
- Multi-select picklist fields

- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code.
- Web links
- The following attachment fields:
  - Attachment
  - Attachment: File Name
  - Attachment: Size (In Bytes)

### About Defining Default Field Values

You can specify default values for fields in the Default Value field in the Field Edit page when you create custom fields or edit field definitions.

Specifying a default value for a field is useful where you require:

- A constant value for a field. For example, you might want an Account Type field to have a default value of Customer when a new record is created.
- A formula-based value as default. For example, you might want the default value for a Due Date field of Fund Requests to take a default value of 6 months after the value of the Create Date field.
- The generation of a unique value for a field. For example, you might want to specify an expression to generate a unique number as an ID for an Expense Report field. (This field is also read-only.)
- A role-specific default value. For example, in a company where the majority of the service requests (SR) are created by customer service representatives (CSR), a Reassign flag field might be checked by default so that, if, for example, a sales representative opens the SR, it is routed to the correct CSR based on pre-defined assignment rules.

**NOTE:** Most of these are possible only if your role includes the Advanced Field Management privilege.

There are two types of default values for fields:

- **Pre Default.** The field is prepopulated with the specified value when a user creates a new record. Users can overwrite the default value or accept the default value.
- **Post Default.** The field is not prepopulated with the specified value when a user creates a new record, but the field takes the specified default value when the record is saved, if:
  - The user leaves the field blank,
  - The field is hidden from the layout
  - A value has not been supplied by the integration tools

Pre Default is the default type of value for fields. You can specify Post Default by selecting the check box of that name in the Field Edit page.

**NOTE:** Post Default field values are not supported in the Offline client, and display as blank fields.

Default field values are applicable to new records only, and not applicable to record updates.

If you specify a default value for a field that already has a system-specified default, your value takes precedence for your company. An exception to this rule is the Revenue field on Opportunity records. Any default or post default values you specify for this field are ignored, because the field is used in the generation of forecasts based on opportunity revenue.

You cannot set default values for these types of fields:

- System fields
- Internal calculated fields
- RowID and ID fields
- **NOTE:** Remember that Row\_ID is an internal system field. Depending on the operation transitions, for example, during record creation, it is not always guaranteed to remain static. It can differ to ExternalSystemID or the IntegrationID.
- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code
- Web links
- Check boxes (Post Default values)
- The following attachment fields:
  - Attachment
  - Attachment: File Name
  - Attachment: Size (In Bytes)

The following table shows the default values that you can specify for the different field types in Oracle CRM On Demand.

Field Type	Valid Default Values
Check box	<p>Y if the checkbox should be checked and the Boolean value is true.</p> <p>N if the checkbox should be unchecked and the Boolean value is false.</p> <p>Blank represents an undefined value for a checkbox even though it appears unchecked</p> <p><b>Note:</b> You cannot select Post Default for a check box field.</p>
Currency	A valid numeric value between -2147483648 and 2147483647.
Date	Today + <i>number</i> , where <i>number</i> represents a specific number of days. The default date is calculated as today's date plus the number entered. For example, if today is 1 January 2008, and you enter Today + 7, the default value is set to 8 January 2008.
Date/Time	As for the Date field type, but in addition the time when the new record is opened is also shown.
Integer	A valid numeric value between -2147483648 and 2147483647.
Multi-select picklist	You cannot define a default value for a multi-select picklist.

Field Type	Valid Default Values
Note	A text value up to 16350 characters.
Number	A valid numeric value between -2147483648 and 2147483647.
Percent	A valid numeric value between -2147483648 and 2147483647.
Phone	A valid telephone number.
Picklist	The picklist value selected will be the default value for the field.
Text (Long)	A text value up to 255 characters.
Text (Short)	A text value up to 40 characters.
Web link	<p>A valid URL. Expressions and validation is not allowed. A default value can be set through the Web Link edit page.</p> <p>The Display Text field can contain up to 250 characters. The URL field can contain up to 8000 characters. Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length changes if you are using parameter substitution.</p>

**NOTE:** If you create an expression to set a default value, the result of the expression must not exceed the maximum number of characters allowed in the field. In addition, any string or numeric literal passed to a function in Expression Builder must not exceed 75 characters. For more information about using Expression Builder, see [Expression Builder](#) (on page 588).

In addition:

- For all field types, including picklists, you can enter a constant value. For example:  
`Status (Task) = 'Not Started'`
- For Date fields you can specify a number of days from today's date. For example:  
`Due Date (Fund Request) = Today() + 180`
- For an Owner field you can specify a <record creator> (variable) or a specific user.  
 No lookup is supported, You must type directly in the field.

You can also create complex expressions for default field values. You can enter an expression directly in the Default Value field, or click the *fx* icon to open the Expression Builder window, where you can enter an expression. For information about the syntax you can use for expressions, see [Expression Builder](#) (on page 588).

To use Expression Builder in field management, you must have the Advanced Field Management privilege in your user role. Users who have the Administrator role can enable this privilege for their own role and for other roles.

## About Field Setup and Page Layouts for Record Ownership Modes

Starting with Release 20, Oracle CRM On Demand provides three modes of record ownership for most of the record types that support books: user mode, book mode, and mixed mode. For existing companies that were created in Release 19 or earlier releases of Oracle CRM On Demand, user mode is the default record ownership mode for the record types that support the three modes of record ownership except for the Service Request record type, which is configured in mixed mode by default. For new companies, mixed mode is the default record ownership mode for the record types that support the three modes of record ownership. For more information about record ownership modes, see [About Record Ownership Modes](#) (on page 223).

The record ownership mode for a record type is determined by the configuration of the Owner field and the Book field on the record type, and the page layouts for the record type must reflect the record ownership mode. The following table shows the configuration of the Owner field and the Book field for each of the record ownership modes. For information about setting up fields, see [Creating and Editing Fields](#) (on page 75).

Record Ownership Mode	Owner Field Set to Required	Book Field Set to Required	Other Configuration Details
User Mode	Yes	No	None.
Book Mode	No	Yes	(Optional) Set the Owner field to Read-Only.
Mixed Mode	No	No	None.

The following table shows the page layout information for each of the record ownership modes. For information about customizing page layouts, see [Customizing Static Page Layouts](#) (on page 89) and [Specifying Dynamic Page Layouts](#) (on page 107).

Record Ownership Mode	Page Layout Configuration
User Mode	<p>The Owner field must be present and must be a required field on each of the Detail page layouts that are used for the record type.</p> <p>If the Book field is present on the Detail page layouts, then it must not be a required field.</p>
Book Mode	<p>The Book field must be present and must be a required field on each of the Detail page layouts that are used for the record type.</p> <p>If the Owner field is present on the Detail page layouts, then it must not be a required field.</p>
Mixed Mode	<p>The Detail page layouts for the record type can optionally contain the Owner field, or the Book field, or both. The Owner field and the Book field must not be required fields on the page layouts.</p>

## About Custom Fields

Oracle CRM On Demand supplies the default fields that most organizations require. However, you might find fields in your existing records that do not have the corresponding fields in the records in Oracle CRM On Demand. In this case, you can create new fields, called *custom fields*, to support the unique needs of your company. This need might arise when you have existing records that you want to import into Oracle CRM On Demand.

Custom fields:

- Can be used in assignment rules, reports, filtered lists, and targeted search
- **NOTE:** For performance reasons, some custom fields cannot be used to sort lists.
- Cannot be deleted
- Cannot be viewed until they are explicitly added to custom page layouts
- Are not inherited from one record type to another

For example, a custom field you added for leads is not automatically carried over to opportunities when that lead is converted to an opportunity.

Custom fields for lead records must be mapped if you want them to transfer when a lead is converted to an opportunity, account, or contact.

- Cannot be viewed by other users until they sign in again
- Can be referenced by Web links, Web services, and other integration technologies

The following table shows you how many new fields you can add to Oracle CRM On Demand. The data pertains to available fields for most record types; that is, you can add 100 new picklist fields for accounts, 100 for contacts, 100 for opportunities, and so on. The maximum number of values (active or disabled) in a picklist is 1000.

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Account	35	80	25	25	35	10
Contact	35	25	25	25	35	10
Lead	35	25	25	25	35	10
Opportunity	35	25	25	25	35	10
Activity	35	25	25	25	35	10
Campaign	35	25	25	25	35	0
Solution	35	25	25	25	35	0
MedEd	35	25	25	25	35	0
Household	35	25	25	25	35	0



Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Funds	35	25	25	25	35	0
Portfolio	35	25	25	25	35	0
Vehicle	70	50	60	50	70	0
Service Request	35	25	25	25	35	10
Program	35	35	25	25	35	0
Custom Object 01	35	25	25	35	35	10
Custom Object 02	35	25	25	35	35	10
Custom Object 03	35	25	25	35	35	0
Dealer	70	105	60	50	70	0
Product	35	25	25	25	35	0
Asset	35	25	25	25	35	0
Fund Request	35	25	25	25	35	0
MDF Request	35	25	25	35	35	0
Program Partner	70	50	60	50	70	10
Revenue	35	25	25	25	35	0
SP Request	35	25	25	35	35	0
User	35	25	25	35	35	0
Deal Registration	35	25	25	35	35	0
Deal Registration Revenue Products	35	25	25	35	35	0
Course	35	25	25	35	35	0
Exam	35	25	25	35	35	0
Certification	35	25	25	35	35	0
Accreditation	35	25	25	35	35	0
Custom Objects 04 and higher	35	25	25	35	35	0

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Industry-specific record types other than those listed in this table	35	25	25	35	35	0

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link
Account	33	30	10	100	30	45	100
Contact	33	30	10	100	30	70	100
Lead	33	30	10	100	30	45	100
Opportunity	33	30	10	100	30	70	100
Activity	33	30	10	100	30	45	100
Campaign	33	30	10	100	30	45	100
Solution	33	30	10	100	30	45	100
MedEd	33	30	10	100	30	45	100
Household	35	30	10	100	30	45	100
Funds	33	30	10	100	30	45	100
MDF Request	35	30	20	100	30	60	100
Portfolio	33	30	10	100	30	45	100
Vehicle	68	60	30	200	60	105	100
Service Request	33	30	10	100	30	45	100
SP Request	35	30	20	100	30	60	100
Program	35	30	10	100	30	45	100
Custom Object 01	35	30	20	100	30	60	100
Custom Object 02	35	30	20	100	30	60	100
Custom Object 03	35	30	20	100	30	60	100
Dealer	68	60	30	200	60	105	100

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link
Product	33	30	10	100	30	45	100
Asset	33	30	10	100	30	45	100
Fund Request	33	30	10	100	30	45	100
Program Partner	68	60	30	200	60	105	100
Revenue	33	30	10	100	30	45	100
User	35	30	20	100	30	60	100
Deal Registration	35	30	20	100	30	60	100
Deal Registration Revenue Products	35	30	20	100	30	60	100
Course	35	30	20	100	30	60	100
Exam	35	30	20	100	30	60	100
Certification	35	30	20	100	30	60	100
Accreditation	35	30	20	100	30	60	100
Custom Objects 04 and higher	35	30	20	100	30	60	100
Industry-specific record types other than those listed in this table	35	30	20	100	30	90	100

## Creating and Editing Fields

You can create custom fields and edit existing field definitions in the Field Edit page for a record type.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To create custom fields and edit fields*

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

**3** In the Record Types Setup section, click the link for the required record type.

**4** In the Field Management section, click *record type* Field Setup.

**5** On the Fields page:

- Click New Field if you are creating a custom field.
- Click the Edit link for the field to edit the field's definition.

**NOTE:** If you have edited a standard field and want to reset all edited values to the default settings, click the Default button located beside the Save and Cancel buttons.

**6** On the Field Edit page, enter a Display Name.

The display name is the label for the field.

**7** On the Field Edit page, select a Field Type if you are creating a field.

**CAUTION:** The Field Type cannot be changed after you save the custom field.

The following rules apply to custom fields, which might differ from those applicable to default fields of the same field type:

Field Type	Maximum Length	Notes
Date	25	
Date/Time	25	
Integer	10	Whole numbers ranging in value from -2147483647 to 2147483647.
Multi-select picklist		You cannot define a default value for a multi-select picklist.
Number	10	Numbers ranging in value from - 2147483648 to 2147483647.
Phone	35	
Picklist	30	
Text (Long)	255	Text fields use a single-line text field.
Text (Short)	40	Text fields use a single-line text field. However, different fields use different lengths.
Web Link	n/a	Web Link custom fields allow you to create context-sensitive hyperlinks in your layouts.  The Display Text field can contain up to 250 characters. The URL field can contain up to 8000 characters. Browsers have different maximum URL lengths. If you specify a URL that is too long, then it might not work as

Field Type	Maximum Length	Notes
		intended. The URL length changes if you are using parameter substitution.

- 8** In the Additional Properties section, complete the following fields as required:

Field	Comments
Required	Select this check box to make the field a required field when creating or updating records. For example, you can require that all users fill in the Account field when adding new contacts.
Default Value	<p>Enter a value or an expression directly, or click the <i>fx</i> icon to open the Expression Builder window.</p> <p>You can add complex expressions only if your role includes the Advanced Field Management privilege. This field can contain an expression up to a maximum of 1024 characters. If you create an expression to set a default value, then the result of the expression must not exceed the maximum number of characters allowed in the field. In addition, any string or numeric literal passed to a function in Expression Builder must not exceed 75 characters.</p> <p>If you enter the default value directly in this field, the number of characters in the default value must not exceed the maximum number of characters allowed for the field type. For number type fields, the value must be within the range of values for the field.</p> <p>For more information about setting default values, see <a href="#">About Field Management</a> (on page 65). For information about the syntax that you can use with expressions, see <a href="#">Expression Builder</a> (on page 588).</p>
Read Only	Select this check box to make the field read-only.
Copy Enabled	Select this check box to allow this field to be copied when the record type is copied using the Copy Record button on the record detail page.
Post Default	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Select this check box if you require that the field is not automatically filled with the default value when a new record is created. The specified default value is set when the record is saved only if a value is not supplied by the user or by integration tools.</p> <p><b>Note:</b> You cannot select Post Default for a check box field.</p>
Field Validation	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Enter an expression directly, or, click the <i>fx</i> icon to open the Expression Builder window.</p>

Field	Comments
	<p>This field can contain a maximum of 1024 characters.</p> <p>For more information about field validation, see <a href="#">About Field Management</a> (on page 65), and for information about the syntax you can use for expressions, see <a href="#">Expression Builder</a> (on page 588).</p>
Field Validation Error Message	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Enter a custom error message to be displayed in addition to the standard message if validation fails for the field. The message can contain only letters, numbers, spaces, commas, periods, and dashes.</p> <p>The following shows how the error messages are displayed, depending on whether you specify a custom error message:</p> <ul style="list-style-type: none"> <li>■ If field validation is set, and no custom message specified: The value entered for '[Field]' does not meet the validation rules set by your company administrator. The validation condition is '[Rule]' (error code).</li> <li>■ If field validation is set, and a custom message is specified: [Custom Error Message] (error code).</li> </ul>

**1** Click Save.

The new fields that you add automatically appear in blue text and brackets in the other activated languages (regardless of the setting of the Mark for Translation check box).

**2** To manually enter the translated equivalent of the new name or Field Validation Error Message:

- a** From the Translation Language drop-down list, select the language whose translation you want to enter.
- b** Enter the translated equivalent in the appropriate Display Name or Field Validation Error Message field, and click Save.
- c** Click the link to return to the Fields page you just updated, and select the language again, if necessary.

The translated name appears in black text in the Display Name column.

**NOTE:** For custom fields to display in Oracle CRM On Demand Answers when the Oracle CRM On Demand user language differs from the language in which the custom field was created, the custom field must be translated in to the applicable language. For example, if a custom field is created in English, a German-language user sees this field in Oracle CRM On Demand Answers only if the field is translated in to German.

Selecting Mark for Translation overwrites both Display Name and Field Validation Error Message in all other languages.

**3** If you created a picklist or multi-select picklist:

- a** Click the Edit Picklist link for the custom field.

- b** In the Picklist Values box, enter each value on a separate line.
- c** Save the record.

**NOTE:** Now you must expose newly-created custom fields, so that they appear on the forms (Edit, Detail and Create forms). They do *not* appear by default. To expose the custom field, create new page layouts as required and make sure that these page layouts are assigned to each role that needs to view the field.

## Administering the Copy Enabled Setting

Most record types in Oracle CRM On Demand have a copy function; that is, users can copy the current record that they are using.

**NOTE:** When you use the Copy Record button, only the base record is copied, but not the related item child records.

The following restrictions apply when using the copy function:

- Web links, system fields, address fields, calculated and reference fields cannot be copied. The Copy Enabled check box is unavailable for these items.
- Read-only fields cannot be copied. Read-only fields are fields that were set as read-only in the field setup or in fields layout.
- Fields that are unavailable on a user's form layout cannot be copied.

This topic describes how to specify which fields you can copy by using the Copy button in record detail pages in Oracle CRM On Demand.

### *To specify which fields can be copied using the Copy button*

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Type Setup section, click the record type for which you want to enable the copy function.
- 4** In the Field Management section, click the setup link for the record type field.  
A list of the fields for the specified record type field is displayed.

- 5** Find the field that you want to edit, and click the Edit link.

**NOTE:** If you want to copy associations, you must select the association picklist, and not the association ID. All fields related to this association are automatically copied when the association picklist is set to Copy Enabled.

- 6** Select the Copy Enabled check box.
- 7** Click Save.

These changes take effect the next time that the user logs in to Oracle CRM On Demand.

## Setting Up Custom Field Integration Tags

Integration tags for custom fields are language independent symbolic identifiers that get assigned to every custom field. These tags are used by Web Services (used when generating WSDL files) and Web Link custom field parameters. These tags allow an administrator to set a meaningful integration name for each custom field. This name is used by integration components, so that the label names can be changed without affecting existing integrations. Integration tags are not visible to end users.

Expression Builder uses integration tags. So, they are also used when creating workflow rules and fields. For more information about workflow rules, see [Creating Workflow Rules](#) (on page 288). For more information about creating and editing fields, see [Creating and Editing Fields](#) (on page 75).

**CAUTION:** Do not change integration tags after setting them up. If you do, you risk losing any technologies that reference the integration tags.

### *To set the integration tag for a custom field*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 In the Field Management section, click *record type* Field Setup.
- 5 On the *record type* Fields page, click Rename Fields.
- 6 On the Rename Fields page, click the Advanced button.
- 7 Update the Integration Tag.

**TIP:** For the Integration Tag, use a short, descriptive name that easily identifies this custom field. This tag is referenced by Web Services, Web links, and other integration technologies (WSDL files for Web Services and URL Parameters for Web Links).

## Setting Up Web Links

A *Web link* is a custom field that allows you to place a hyperlink to an external Web site or Web-based application in a record in Oracle CRM On Demand. You can use a Web link custom field to provide a convenient way for users to navigate to another Web page, including another page in Oracle CRM On Demand. You can create Web link custom fields for any record type. For example, you might define a Web link field for the account record type that updates the account details with values from another application. As with other custom fields, you must add Web Link fields to your record page layouts to make them visible to your users.

You can configure a Web link to simply open another Web site. You can also configure the Web link to pass specific information from the Oracle CRM On Demand record as a parameter in the URL. For example, you might create a Web link field to pass address information from an account record to a Web site that provides address-specific maps. Then, when the user clicks the Web link on the account record, a map for your account location is opened.

You can configure the Web link to appear only in certain circumstances. For example, you can specify the conditions that must be met before the Web link is displayed, and you can configure the link to appear only on the Detail pages to prevent users from clicking the link from the Edit pages.



**NOTE:** The contents of the Web link fields cannot be carried over to the new records when a lead is converted.

**Before you begin.** To configure Web Link fields, you must be familiar with the syntax of the target URL.

### To set up the Web link

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 In the Field Management section, click *record type* Field Setup.
- 5 If the Web link field does not already exist, create a custom Web link field as described in [Creating and Editing Fields](#) (on page 75).
- 6 On the Fields page, click the Edit Web Link link for the custom field.
- 7 On the Edit Web Link page, fill in the Window Properties:
  - a For Display Text, enter the label (display name) for the hyperlink, which the user sees in the layout.  
Example: Click Here for Stock Ticker (underlined).  
  
You can also include context-sensitive parameters in the Display Text field by placing the cursor in the Display Text field, and then selecting the User Fields or (Record Type) Fields list. A field parameter is placed in the Display Text field (designated by %%%fieldname%%%), which is replaced by the field value based on the current record.  
  
**NOTE:** If your display text is too long to fit in the layout, it will be concatenated. Also, the information for any variables is added at run time.
  - b Select how you want Oracle CRM On Demand to behave when a user clicks the hyperlink:
    - **Open in Current window.** Opens the hyperlinked page in the current window, replacing the current Oracle CRM On Demand session.
    - **Open in Custom Web Tab.** Opens the hyperlinked page in a custom Web tab. Select the required Web tab from the Target Custom Web Tab list.
    - **Open in New window.** Opens the hyperlinked page in a new window, leaving the current Oracle CRM On Demand window unchanged. Select the Parent Window Refresh check box if you want to refresh the parent window after the user closes the new window.
  - c For Display Options, select Detail Page, Edit Page, or Both, depending on whether you want the Web link to appear on Detail pages only, Edit pages only, or both Detail and Edit pages.
- 8 Fill in the Link Properties:
  - a For Active Link Condition, enter an expression for a condition that controls whether the Web link is active on the Detail and Edit pages. You can click the fx icon next to the Active Link Condition field to

open the Expression Builder window in which you can enter an expression. For information about the syntax that you can use for expressions, see [Expression Builder](#) (on page 588).

For example, if you enter an expression like [Revenue] > 10000, the Web link is active only if the condition, Revenue value greater than 10000, is met.

If you do not enter an expression, the Web link is always active. If you enter an expression, and the condition is not met, the Web link is still displayed, but it is not active.

- b** For Display Link Condition, enter an expression for a condition that controls whether the Web link is visible on the Detail and Edit pages.

For example, if you enter an expression like [Revenue] > 10000, the Web link is displayed only if the condition, Revenue value greater than 10000, is met.

If you do not enter an expression, the Web link is always displayed.

The following applies to the expressions in the Display Link Condition, and Active Link Condition fields.

- **New page.** The visible and active expressions are not evaluated for new pages. They are set to TRUE by default. The only way to disable the link is to make the expression explicitly FALSE.
- **Edit page.** The visible and active expressions are set to TRUE by default. However, you can use the Expression Builder to add a new expression.

- c** For Url, enter the URL that is invoked when the user clicks the hyperlink, such as [www.oracle.com](http://www.oracle.com).

**NOTE:** You can also include context-sensitive parameters by placing the cursor in the URL field, and then selecting the User Fields or (Record Type) Fields list. A field parameter is placed in the URL (designated by %%%fieldname%%%), which is replaced by the field value based on the current record when the user clicks the value.

If you do not specify any URL, the user is directed to a void URL when clicking the link.

**NOTE:** Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser when they click the Web link.

- 9** For User fields, select an option from the User Fields list to add user parameter fields to the URL field or Display Text field at the current position of the cursor.

For example, if you choose User id from the list, %%%User id%%% is inserted into either the URL or the Display Text, depending on where your cursor is positioned. At run time, this parameter is replaced with the user ID of the user who is logged in.

- 10** For *record type* fields, place your cursor in the URL or Display Text field where you want to add a parameter, and then select the field that you want to include from the list.

For example, if you select the field Row id, %%%Row id%%% is inserted into either the URL or the Display Text, depending on where your cursor is positioned. At run time, this parameter is replaced with the row ID of the current record.

**NOTE:** A placeholder for the name of a record type is indicated by the words, *record type*, in italics. For example, *record type* refers to the record type where you add the Web link custom field. For example, if you are editing a Web link for a contact record, this field appears as the Contacts Fields list.

- 11** Click Save.

- 12** Add the Web link field to the *record type* page layout, as described in [Customizing Static Page Layouts](#) (on page 89).

## About Using Web Links to Create New Integration Scenarios

Adding Web link custom fields to Oracle CRM On Demand provides many new integration opportunities. You can create an integration, based on the user interface, to on premise and external systems that allow users to navigate directly to content from Oracle CRM On Demand.

Some examples include:

- Create a link to a financial Web site based on the account ticker symbol that brings up a stock chart for the account.
- Create a link to an internal system that uses Web Services and creates a composite view of data from multiple on premise and hosted solutions relevant to the current account.

For step-by-step instructions on how to create Web links, see [Setting Up Web Links](#) (on page 80).

## Renaming Fields

To use terminology that is familiar to your employees, you can change field names. For example, you can change the Account Name field label to Company Name.

**NOTE:** It can take 30-60 minutes for the new field display names to appear in reports and analytics.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### To rename a field

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Type Setup section, click the link for the required record type.
- 4** In the Field Management section, click the required Field Setup link.
- 5** In the *record type* Fields page, Click Rename Fields.
- 6** In the Display Name column, edit the Name for the field.
- 7** (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

**NOTE:** If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

Selecting the Mark for Translation check box also causes the Field Validation Error Message (from the Field Edit page) to be marked for translation if the error message exists. The Field Validation Error Message field is visible only for users whose role includes the Advanced Field Management privilege.

- 8 To manually enter the translated equivalent of the new name:
  - a From the Translation Language drop-down list, select the language whose translation you want to enter.
  - b Enter the translated equivalent in the appropriate Display Name field and click Save.
  - c Click the link to return to the Fields page you just updated and select the language again, if necessary. The translated name appears in black text in the Display Name column.
- 9 Click Save.

## Using Indexed Custom Fields

To optimize the performance of Oracle CRM On Demand, you can use custom fields that have been optimized for specific record types. These optimized fields, which are called *indexed custom fields*, are special fields that improve the response time during a search or when sorting a particular list. Indexed custom fields are preconfigured in the Oracle CRM On Demand database. You can change the labels on the indexed custom fields, but you cannot change the integration tags.

**NOTE:** You can choose to migrate your data from a custom field to an indexed custom field to increase the performance of lists for users. To migrate the existing data to the available record types, use the export and import functionality of Oracle CRM On Demand or Web services. For more information about exporting and importing data, see [Import and Export Tools](#) (on page 351). For more information about Web services, see [Web Services Integration](#) (on page 543).

Indexed custom fields are prefixed with the word, *Indexed*, by default. The following record types do not support indexed custom fields:

- Assessment
- Book
- User

The following table lists the record types that support indexed custom fields:

Record Types Supporting Custom Fields	
Activity	Product
Household	Partner Program
Fund Request	Fund
User	Vehicle Service History
Vehicle Contact	Vehicle Sales History
Vehicle	Custom Objects 1-3

Record Types Supporting Custom Fields	
Campaign Recipient	Vehicle
Dealer	Product Category
Asset	Note
Appointment User	Appointment Contact
Task User	Task Contact
Appointment, Task, and Call	Solution
Service Request	Lead
Campaign	MedEd Event
Opportunity Contact Role	Opportunity Product Revenue
Opportunity	Product
Custom Objects 1-3	Contact Team
Contact	Campaign
Call Promotional Items Dropped	Call Product Detail
Account Team	Account
Contact Best Times	

Each record type in the table has the following indexed custom fields:

- Indexed Checkbox
- Indexed Currency
- Indexed Date
- Indexed Number
- Indexed Picklist 1
- Indexed Picklist 2
- Indexed Picklist 3
- Indexed Picklist 4
- Indexed Picklist 5
- Indexed Picklist 6
- Indexed Long Text
- Indexed Short Text 1
- Indexed Short Text 2

All other record types in Oracle CRM On Demand have the following indexed custom fields:

- Indexed Number
- Indexed Date
- Indexed Checkbox
- Indexed Currency
- Indexed Picklist 1
- Indexed Picklist 2
- Indexed Picklist 3
- Indexed Picklist 4
- Indexed Picklist 5

**Exceptions:** For all Custom Objects, some fields use different naming conventions to those listed in the previous tables:

- Index Picklist 6 = Type
- Index Short Text 1 = Quick Search 1
- Index Short Text 2 = Quick Search 2
- Index Long Text = Name

### ***To use indexed custom fields***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 In the Field Management section, click *record type* Field Setup.
- 5 In the *record type* Field page, click Rename Fields and rename the indexed custom fields as appropriate for your company, see [Renaming Fields](#) (on page 83).

## **Reverting Settings to Defaults**

You can revert all relabeled field names to their original names. (The default option does not affect custom fields or picklist values you added—they do not revert to their default values.)

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### ***To revert settings to their defaults***

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

- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field Management section, click the required Field Setup link.
- 5 In the *record type* Fields page, click the Rename Fields button.
- 6 Click the Default button.

## Changing Picklist Values

Some fields give users a drop-down list of predefined values from which they must choose. This list of values is called a *picklist*. For example, the values in the Area field picklist for service requests might be Product, Installation, Maintenance, and Training.

You can add, edit, and reorder values to the picklists for fields. Picklists must contain at least one value, but the maximum number of values (active or disabled) in a picklist is 1000.

The system does not allow you to change picklist values used for forecasting and report metrics. However, it does allow you to change other picklist values used as the basis for standard lists that appear in other areas of the application. For those standard lists, the application still includes the records meeting the criteria, regardless of the picklist values you renamed. For more information, see [About Fields, Picklists, and Metrics](#) (on page 135).

After you create a new picklist, an initial value called *<No Values>* is automatically available in the picklist. This value is used to communicate to users that values do not yet exist in the picklist, in the case where the field is added to a page layout before real values are added to the list. The default *<No Values>* option disappears from the picklist as soon as a custom value is added to a picklist.

**CAUTION:** Do not use the default *<No Values>* value as part of any new picklist or cascading picklist. Using the value in this way can lead to errors within Oracle CRM On Demand. If you want to continue to have a *<No Values>* option available in a picklist, you must add it as a custom value.

As a best practice, do not rename or reuse the existing picklist values. Instead, disable the old picklist value, create a new picklist value, and perform an import or a mass update (or alternatively, Web Services) to change all record values to new picklist values. If you change a value in a picklist, you must verify that the value is updated and changed for each individual record as this is not implemented automatically by Oracle CRM On Demand.

**NOTE:** In Oracle CRM On Demand (the standard application), the priority of tasks is indicated in task lists by arrows. An up arrow indicates 1-High priority, no arrow indicates 2-Medium priority, and a down arrow indicates 3-Low priority.

If you change the default picklist values for the Priority field on the activity record, an arrow might not be displayed in the Priority field in task lists.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### To change picklists

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

- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field Management section, click the required Field Setup link.
- 5 In the *record type* Fields page, click the Edit Picklist link for the field whose values you want to customize.  
**NOTE:** Due to specialized coding, customizing the Oracle CRM On Demand Life Sciences Edition Sample Transaction Type picklist, Account Call Type picklist, and Contact Call Type picklist is not supported.
- 6 In the Edit Picklist window:
  - To change an existing value, enter the new value in the Picklist Values field, or disable the old value and create a new value.  
**NOTE:** If you want this updated name to appear in the picklists for other activated languages, select the Mark for Translation check box. In the other languages, this updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.  
If you do not select Mark for Translation, the other picklist values are unaffected by the change you made here.
  - To add a new value, enter the information in the row that appears at the bottom of the list.  
To add further new values, click Save & New.  
New picklist values you add automatically appear in blue text and brackets in the other activated languages (regardless of the setting of the Mark for Translation check box).
  - To delete a value, select the Disabled check box. To hide or show disabled values, click Hide Disabled and Show Disabled respectively.  
**CAUTION:** When you disable values, you also hide the translated versions in other languages.
  - To arrange the order in which the picklist values appear, change the numbers in the Order column.  
**TIP:** Consider entering numbers with gaps between them, such as 10, 20, 30, and so on. This allows you to add new values in the middle of the picklist more easily, without reordering the entire list.
  - To arrange the picklist values in alphabetical order, click the Save & Order Alphabetically button.
- 7 In the Edit Picklist window, click Save & Close.
- 8 To manually enter the translated equivalent of the new picklist value:
  - a On the Fields page, select the language from the Translation Language drop-down list.
  - b Click the appropriate Edit Picklist link.
  - c Enter the translated equivalent and click Save.  
**NOTE:** To help you identify the picklist value when you are editing, the application displays the internal ID and the language-specific default value. If you edit the wrong picklist value, the picklist becomes out of sync across languages.



## Customizing Related Item Layouts

You can customize page layouts to improve the look-and-feel of Oracle CRM On Demand. The layout functionality for related items allows you to customize a related-list layout for most record types, excluding teams, to show the specified fields. You can select fields from related lists and some parent fields. You can select which fields that you want to appear, and you can specify the order of the fields that meets your business needs. However, you cannot select the number of rows that are displayed, and you cannot specify the sort fields.

**Before you begin.** To perform this procedure, your role must include the customize application privilege. The following procedure describes how to customize the related item layout.

### *To customize the related item layout*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click Application Customization.
- 3 In the Record Type Setup section, click the link for the record type that you want.
- 4 In the Page Layout Management section, click the Related Information Layout link that you want for the record type that you selected.

The Related Information Section page appears.

- 5 In the Related Information Setup section, select the related information type that you want to customize. The Related Information Layout page for the selected related information type appears.

**NOTE:** The items in the Related Information Setup section vary depending on which record type you select.

- 6 Do one of the following:
  - Click Edit to modify an existing layout.
  - Click New Layout to create a new layout.
  - Click Copy to copy an existing layout.

The Related Information Layout Wizard is displayed and guides you through the process.

- 7 In Step 1 Layout Name, enter a name for the layout and a description (optional), and click Next.
- 8 In Step 2 Field Setup, select fields from the available Fields list, and click the up and down arrows, next to the Selected Fields list, to organize the fields in the order that you want.
- 9 Click Finish.

## Customizing Static Page Layouts

The right look and feel of an application is important for user adoption, and one way to achieve the right look and feel is by customizing page layouts. As part of the customizing process, you can:

- Add custom fields to the Edit, Detail, and Create forms.
- Make fields required on the Edit and Create forms.
- Add or hide sections on the Detail pages.

You can make sections unavailable (hidden) to your employees or you can make them available but hide them initially.

There are two methods of customizing page layouts. You can define static page layouts defining specific fields by role, or dynamic page layouts that change based on the type of record being created. Dynamic page layouts can also be assigned by role.

**NOTE:** You can create page layouts for emails, voicemails, and calls in Oracle Contact On Demand. Dynamic layouts are not supported in Oracle Contact On Demand.

You can create new layouts for each record type and then assign a page layout for each record type to a user role. When a user with that role signs in, the user then sees any customized layout specific to each record type. For example, you can create two page layouts for opportunities: one simplified layout for service representatives showing only the most important fields and another layout for field sales representatives showing many more fields, and assign the different layouts to the different roles. Users who are not assigned the service representative or field sales representative roles continue to see the default layout for the Opportunity page. As another example, you can create two page layouts for contacts, such that the Account field is required when service representatives add new contacts, but not required when service managers add new contacts.

If you do not assign a custom page layout for a record type for a given role, the default page is used for that record type.

When customizing a page layout, you can determine:

- Which fields appear on the page  
For custom fields to appear, you must add them to the page layouts. After that, users with roles to which the custom page layout is assigned will see the fields on the Edit page, Detail page, and Create form (in the Action bar).
- Where fields appear on the page
- Which fields are required
- Which fields are read-only
- Which linked record types are displayed in the Related Information sections on the Detail page.  
For example, you might want linked contacts to appear on the Accounts Detail page.
- How many page sections appear and with which headings.

You can copy standard layouts, but you cannot edit or delete them. You can delete custom layouts, unless it is already assigned to a role or a dynamic layout.

## Considerations for Fields in Page Layouts

When you design your page layouts, consider the following:

- Some record fields are important to report and forecast calculations. To enforce the consistent use of these fields, they are flagged as required. You cannot change the required flag on these fields when customizing a page layout. You also cannot remove them from a page layout.

- Removing fields from a page layout can have important implications for how the records are used. For example, if you remove the Status and Publish fields on solutions records, employees with that page layout cannot approve solutions or make them available to others.
- Addresses are grouped together so that the field and their labels reflect the naming convention for each country. Therefore, for some record types, you cannot separate out individual address lines. Instead, you must select the field that includes the group of address lines (a single address option). This option replaces the individual fields that you could select in previous releases, such as Street, City, Zip Code. For example, for leads, the field Billing appears on the Field Setup and Field Layout steps of the Page Layout assistant. The Billing field includes all the Billing Address fields.

### Page Layouts and Lists

You can use page layouts and role privileges to limit the fields that users can search, view in lists, and export. When a user creates or refines a list of records or uses advanced search to find records, the privileges and page layouts assigned to the user's role determine which fields the user can search and view.

If the All Fields in Search and Lists privilege is enabled for the user's role, then the user can search all of the fields that are made available in the search layout that is assigned to the user's role for the record type. Also, when creating or refining a list, the user can select any field to display it as a column in the list of records that is returned by the search.

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

If the All Fields in Search and Lists privilege is not enabled for the user's role, then the user can search a field only if it meets both of the following criteria:

- The field is available in the search layout that is assigned to the user's role for the record type.
- The field is displayed on the Detail page layout that is assigned to the user's role for that record type. If dynamic page layouts are defined for the role, then the field must be displayed on at least one of the dynamic page layouts.

Also, when creating or refining a list, the user can select a field to display it as a column in the list of records that is returned by the search only if the field is displayed on at least one of the Detail page layouts, including dynamic page layouts, that are assigned to the user's role for the record type. This restriction also affects what the user can export in a list. If the List - Export Displayed Fields privilege is enabled on the user's role, but the List - Export all Fields privilege is not enabled, then the user can export only the fields that are displayed in the list. The user cannot export all fields on the records in the list.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### To create a page layout

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.

4 In the Page Layout section, click the required Page Layout link.

5 In the Page Layout list, do one of the following:

- Click the Edit link for an existing layout to modify it.
- Click the New Layout button to create a new layout.
- Click the Copy link to copy an existing layout.

The Page Layout Wizard appears to guide you through the process.

**NOTE:** The number of steps in the Page Layout Wizard can differ depending on the Page Layout link you click.

6 In Step 1 Layout Name, enter a name for the layout and a description (optional).

7 In Step 2 Field Setup, select the field characteristics.

Select the Required check box for any fields that you want to make required.

Select the Read Only check box for any fields that you want to make read only.

**CAUTION:** Make sure that you do not remove a required field from a page layout. If you do, anyone with that layout will be unable to create or edit a record of that type.

8 In Step 3 Field Layout, you can:

- Move fields from the *record type* Available Fields list to various sections of the *record type* Arrange Page Layout area.

Make sure you move the custom fields and the industry-specific fields you want to add to the forms.

- Rearrange the information.

**NOTE:** These changes affect all the forms for that record type when a user with an appropriate role views the pages. Some fields include a group of fields or multi-line fields. Avoid moving those fields around since the information itself might overlap other fields in the final layout. For this reason, the application does not allow you to move multi-line text fields, such as Description.

The application uses an address template that provides the fields specific to each country. For more information, see [About Countries and Address Mapping](#) (on page 355).

9 In Step 4 Related Information, you can:

- Add sections or remove sections that appear on the Detail pages. The sections are the areas where users can link records to the current record.

For example, if you do not want employees to be able to link products to opportunities, make sure the Products section does not appear in the Displayed or Available Information box.

**NOTE:** Users can change these default settings through the Edit Layout link on the Detail page for their application. After users have edited their personal layouts, they do not see new changes to the related information made by the company administrator until they edit their layout another time.

- Change the order of the sections on the Detail pages.

**NOTE:** These changes affect the Detail pages for that record type when a user with an appropriate custom role views the pages.

- 10** In Step 5 Related Information Layout, select the appropriate related information layout for each of the related information sections on the page.

**NOTE:** The default layout for each related information section is the standard one. If you have created custom related information layouts already, you can select them from the list. For more information about creating related information layouts, see [Customizing Related Item Layouts](#) (on page 89).

- 11** Click Finish.

- 12** Assign the page layout for this record type to user roles as required, see [Adding Roles](#) (on page 210).

## Renaming Field Section Titles

On the record Edit and Detail pages, fields are grouped into sections. To use terminology that is familiar to your users, you can rename the titles above groups of fields on your Edit and Detail pages. On the Account Homepage, for example, you can change Key Account Information to Account Profile.

You cannot rename sections on the standard layouts. You must create a new one and rename the sections on the custom layout.

Sections with no fields in them do not appear on the Detail page.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### To rename a section

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Type Setup section, click the link for the required record type.
- 4** In the Page Layout section, click the required Page Layout link.
- 5** In the *record type* Page Layout page, click Edit Sections.
- 6** In the Translation Language drop-down list, select the primary language for your company.
- 7** In the Display Name, type in the name you want to use.
- 8** (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

**NOTE:** If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

- 9** To manually enter the translated equivalent of the new name:

- a** From the Translation Language drop-down list, select the language whose translation you want to enter.
- b** Enter the translated equivalent in the appropriate Display Name field and click Save.
- c** Click the link to return to the Fields page you just updated and select the language again, if necessary.  
The translated name appears in black text in the Display Name column.

## Creating Web Applets

You can embed external Web content by creating a custom Web applet that appears on a Homepage or the Detail page for a record type.

When you create a Web applet, you must add it to the page layout for the Homepage or Detail page. For users to see that page layout, it must be assigned to an appropriate user role.

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

### *To create a new Web applet*

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Type Setup section, click the link for the required record type.
- 4** In the Page Layout Management section, click the required record type Web Applet link.
- 5** In the *record type* Applet list, click New.
- 6** On the Web Applet page, complete the following fields.

Field	Comments
Name	Enter a name. The value in the name field appears in the title bar of the Related Information section.
Location	Select Homepage or Detail Page, depending on whether the external content is to appear on a homepage or on the Detail page.

Next, complete the fields according to the type of applet you require, as described in [Creating Custom Web Applets](#) (on page 113).

### *To make the Web applet visible*

- 1** In the upper-right corner of any page, click the Admin global link.
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2 In the Application Customization section, click the Application Customization link.

3 In the Record Type Setup section, click the link for the required record type.

4 In the Page Layout section, click the required Page Layout link.

5 In the Page Layout list, do one of the following:

- Click Edit to modify an existing layout.
- Click New Layout to create a new layout.
- Click Copy to copy an existing layout.

The Page Layout Wizard is displayed and guides you through the process.

**NOTE:** The number of steps in the Page Layout Wizard can differ depending on the Page Layout link you click. In Step 1 Layout Name, make sure the layout has a name, and if required, a description.

6 In Step 4 Related Information:

- a Move the new Custom Web applet from the Available Information list to the Displayed Information list.
- b Click the up and down arrows to position the new custom Web applet, as required.
- c Click Finish to create the new layout.

7 Add the page layout to user roles as required, see [Adding Roles](#) (on page 210).

### Related Topic

The following topic provides an example of creating a Web applet that displays a Twitter RSS feed:

- [Example of Setting Up an RSS Feed Web Applet](#) (on page 120)

## Defining Cascading Picklists

Cascading picklists restrict the values of one picklist, the *related* picklist, based on the value selected in another picklist, the *parent* picklist. For example, a parent picklist might present a list of service request Categories and drive the value of a related picklist called Sub-Categories. When the user selects, for example, the value Installation for Category, the Sub-Categories picklist is dynamically constrained to show only the picklist values that are associated with the Installation Category.

You can link together multiple picklists, including both pre-defined and custom picklist fields, as cascading picklists. You can also nest cascading picklists, so a related picklist in one cascading picklists definition can be a parent picklist in another cascading picklists definition.

**Before you begin.** Before you create a cascading picklists definition, the parent and related picklists must exist. For information about creating picklists, see [Creating and Editing Fields](#) (on page 75). To perform this procedure, your role must include the Customize Application privilege.

### ***To create a cascading picklists definition***

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Type Setup section, click the link for the required record type.
- 4** In the Cascading Picklists section, click the required Cascading Picklists link.

The record types listed include the parent record type and related record types that have custom picklist values. For example, for opportunities there are links for Opportunity Partner, and Opportunity Competitor.

- 5** In the Cascading Picklists page, do one of the following:
  - Click Edit or Copy to modify an existing cascading picklists definition.
  - Click the New button to create a new cascading picklists definition.

The Cascading Picklists Wizard guides you through the process.

- 6** In Step 1 Select Picklists, select a parent picklist and a related picklist.
- 7** In Step 2 Select Values, you can:
  - View the existing associations between a Parent Picklist value and the Related Picklist values. When you select a value in the Parent Picklist Available Values list, the available values for the related picklist are shown in the Related Picklist Available Values list, and the values that will be displayed are shown in the Related Picklist Displayed Values list. If there are no values in the Related Picklist Displayed Values list, all of the values in the related picklist will be displayed when the corresponding value in the parent picklist is selected.
  - Create a new association. Move the desired value from Related Picklist Available Values to Related Picklist Displayed Values.
  - Remove an existing association. Move the value from Related Picklist Displayed Values to Related Picklist Available Values.
- 8** In Step 3 Confirm, you can confirm your selections of Related Picklist values for each Parent Picklist value, and then click Finish to complete defining the cascading relationship between the Parent and the Related picklists.

Clicking Finish in the wizard returns you to the Cascading Picklist List for the current record type.

After you click Finish, and add the cascading picklists definition to a page layout, it is automatically activated for all roles that include that layout.

## **Managing Search Layouts**

For most record types you can specify the fields, both standard and custom fields, which users can use when searching for records. Also, you can specify the fields that are displayed in the search results page. You specify the search fields in a search layout, and you assign a search layout for each record type to user roles as required, see [Adding Roles](#) (on page 210).



You can copy an existing search layout and then modify it to your requirements, or you can edit existing search layouts. The default search layout is read-only. You can copy it, but you cannot delete or edit it. To specify the fields that are used in searches and the fields that are displayed in the search results, you use the Search Layout Wizard.

**CAUTION:** When you create or edit a search layout for the User record type, do not add both the Reports To field and the Reports To (Alias) field to the same search layout. If both of these fields were made available on a search layout, then searches using that search layout would fail. For more information about the Reports To and the Reports To (Alias) fields, see [About the Reports To and Reports To \(Alias\) Fields on User Records](#) (on page 154).

## Managing the Behavior of Lookup Windows

You can also use the Search Layout Wizard to manage the behavior of Lookup windows, which are used with the smart-associations functionality of Oracle CRM On Demand. Smart associations make it easier for users to associate different record types, such as account, contact, opportunity, activity, and so on with each other.

With smart associations, users can type the name of the associated record, and Oracle CRM On Demand attempts automatically to resolve the association. For example, when creating a task, users can type an account name in the Account field. When the user saves the record, Oracle CRM On Demand then searches automatically for accounts that match. If a unique match is found, then the appropriate account is used. If no matches or multiple potential matches are found, then users are presented with a Lookup window where they can perform additional searches or pick the appropriate account. Rather than use this autoresolve feature, the user can also click the Lookup icon to display the Lookup window directly. For more information about smart associations, see [Linking Records to Your Selected Record](#).

The following options are available for configuring the behavior of the Lookup window for each record type. All of these options are selected in the default search layout:

- **Configure Lookup Window With Default Fields.** If this option is selected, then the fields in the default search layout are used.
- **Show Search Results When Lookup Window Opens.** If this option is selected, then the list of available records is displayed in the Lookup window when it is opened. If the option is deselected, no records are displayed when the Lookup window is opened.

**NOTE:** If manager visibility is enabled for the company, the list of records in some Lookup windows can be slow to populate, and in some cases, the Lookup window might time out. To prevent a timeout, deselect the Show Search Results When Lookup Window Opens check box for the record type associated with the Lookup window. The Lookup window then displays no records, and users can specify the search criteria to find the records that they want.

- **Auto-Resolve Enabled.** If this option is selected, smart associations are automatically resolved. If it is deselected, smart associations are not automatically resolved, and the user must click the Lookup icon and use the Lookup window.
- **Show Context-Sensitive List as Lookup Window Default.** If this option is selected, and the record type has one or more context-sensitive lists, then all such lists will appear before the other lists in the *record type* List field in the upper-left corner of the Lookup window. Context-sensitive lists are most likely to contain the records that users require. For examples and more information about context-sensitive lists, see [Searching for Records in Lookup Windows](#).

**Before you begin.** To manage search layouts, your role must include the Customize Application privilege.

The following procedure describes how to create or modify a search layout.

### **To create or modify a search layout**

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the record type for which you want to create or modify a search layout.
- 4 In the *record type* Application Customization page, click the *record type* Search Layout link.
- 5 In the Search Layout list, do one of the following:
  - Click Edit or Copy to modify an existing layout.
  - Click the New Layout button to create a new layout.
  - Click Remove to delete an existing layout not currently assigned to a role.

The Search Layout Wizard guides you through the process.

- 6 In Step 1, Define Layout Name, enter or modify the name and optionally a description for the layout.
- 7 Click Next.

In Step 2, Specify Search Fields, there are three lists:

- **Not Available Search Fields.** This list displays all the fields that are not available for search. This list is empty by default.
- **Targeted Search Fields.** This list displays all the fields that are available for targeted search and that will be displayed in the Targeted Search applet for the record type in the Action bar. The Targeted Search applet can display a maximum of seven fields. So, if you add more than seven fields to the list, then the following occurs:
  - An error message is displayed.
  - The selected fields are available as the prepopulated default fields in the Advanced Search criteria form.
  - The selected fields appear as the prepopulated default fields in the filter criteria when creating or refining lists.
  - The selected fields appear as the set of fields that you can search in the Lookup window.

You do not need to specify any fields in the Targeted Search Fields list. If no fields are specified, then the record type does not appear in the Targeted Search applet. Eliminating unnecessary record types from Targeted Search can help you find the record type that you want faster.

- **Additional Search Fields.** This list displays the fields that will not be available for targeted search but that will be available in other searches, such as advanced searches.

Indexed fields are displayed in green text. Indexed fields that are case-insensitive are displayed in blue text.

**NOTE:** For optimal performance, use indexed fields when defining your search fields. If either the Targeted Search Fields or Additional Search Fields list contains any fields that are not optimized, then a warning message appears.

You arrange the fields within a list by clicking the up arrow and down arrow, and you move fields between the lists by clicking the right arrow and left arrow, or up arrow and down arrow. The order of the fields in the lists is used in the Targeted Search applet in the Action bar and in the search criteria forms.

- 8 In Step 2, move the fields to the Not Available Search Fields list, and arrange the fields in the Targeted Search Fields and Additional Search Fields lists, as required.

**CAUTION:** It is recommended that you add fields to the lists sparingly because the number of columns in the lists can affect performance. The performance varies dramatically by record type and by field type. Each additional field can increase the loading time for the list.

- 9 Click Next.

In Step 3, Define Search Results Layout, there are three lists:

- **Not Available Search Results Fields.** This list displays all the fields that will not be displayed in the search results.
- **Lookup Window Search Results Fields.** This list displays the fields that will be displayed in the search results for the Lookup window. This list has a limit of nine fields.
- **Additional Search Results Fields.** This list displays the extra fields, in addition to those in the Lookup Window Search Results Fields list, that will be displayed in the search results other than for Lookup window searches.

The total number of fields allowed for the Lookup Window Search Results Fields and the Additional Search Results Fields list is 20, which means the search results cannot display more than 20 columns. For more information about searching for records, see Finding Records.

- 10 In Step 3, Define Search Results Layout, move fields to the Lookup Window Search Results Fields and Additional Search Results Fields lists, and rearrange them, as necessary.
- 11 Select or deselect the following check boxes as required to configure Lookup Windows behavior:
  - Configure Lookup Window With Default Fields
  - Show Search Results When Lookup Window Opens
  - Auto-Resolve Enabled
  - Show Context-Sensitive List as Lookup Window Default

- 12 Click Finish.

### Related Topics

See the following topics for related information:

- [Customizing Related Item Layouts](#) (on page 89)
- [Customizing Static Page Layouts](#) (on page 89)
- [Creating Record Homepage Layouts](#) (on page 102)

## Managing List Access and List Order

For each record type you can specify the lists that are available for each role, and the order in which the lists are displayed on the record type's Homepage.

You can create a new layout for only those roles that you have not already customized. You can also edit or delete existing layouts. You cannot manage the list access and order for a user's private lists.

### Before you begin:

Because you must select a role that this customization applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customize Application privilege, and the Manage Public Lists and Role Management privileges.

### To create or modify list access

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the List Access and Order section, click the *record type* List Access and Order link.
- 5 In the List Order Layout page, do one of the following:
  - Click Edit or Copy to modify an existing layout.
  - Click the New Layout button to create a new layout.
- 6 If you are creating a new layout, select a role from the Role Name drop-down list.  
Only roles that do not already have an associated layout are available in the drop-down list.
- 7 Move lists between the All Lists, Lists Available for this Role, and Show in Short List lists as required.
  - All Lists contains all the lists for the record type, apart from private lists.
  - Lists Available for this Role contains all the lists available for the role that you select.
  - Show in Short List contains the lists displayed in the List section in the Homepage for the record type, and the drop-down menu in the record type view.
- 8 Rearrange the order of the lists as required using the up and down directional arrows.
- 9 Click Save.

## Creating Homepage Custom Reports

You can add multiple reports, including both prebuilt and custom reports, to the record type Homepages. This feature allows you to provide the most relevant information to different users. For example, you can configure the Service Request Homepage for a customer service representative to show a custom service-request report.

For some record types, standard reports are shown on the record type Homepage by default. You can replace the standard reports with different reports, or you can add additional reports. You can also specify Homepage reports for record types where no report is shown on the record type Homepage by default.

To make a prebuilt or custom report available on a record type Homepage, you first create a Homepage Custom Report record for the report. When you create or edit the Homepage layouts for a record type, any Homepage custom report records that you created for the record type are listed in the Available Sections list in the Homepage Layout Wizard. You can then make a report available on a Homepage layout as follows:

- You can add the report to a Homepage layout, so that any user whose role has that Homepage layout automatically sees that report on their record type Homepage.
- You can leave the report as an available section on a record type Homepage layout, so that any user whose role has that Homepage layout and the Personalize Homepages privilege can add the report to his or her record type Homepage.
- If you do not want users with a certain role to be able to add the report to their record type Homepage, you can move the report out of the Available Sections list in the Homepage Layout Wizard.

For more information about customizing Homepages, see [Creating Record Homepage Layouts](#) (on page 102).

If your role has the appropriate privileges, you can create custom reports and add them to custom Homepage layouts for all record types. The following table shows the privileges required for the various tasks involved in making a custom report available on a Homepage.

Task	Privilege Needed	Notes
(Optional) Create a custom report and publish it to a company-wide folder	Manage Custom Reports	For more information, see <a href="#">Getting Started with Answers (Custom Reports)</a> .
Create a Homepage custom report	Customize Application Customize Application - Manage Homepage Customization	Instructions for this task are provided in this topic.
Add a custom report section to a Homepage layout	Customize Application Customize Application - Manage Homepage Customization	For more information, see <a href="#">Creating Record Homepage Layouts</a> (on page 102).
Add a Homepage layout to a user role	Manage Users and Access	For more information, see <a href="#">Adding Roles</a> (on page 210).
(Optional) Add or remove a custom report section on a Homepage (end user)	Personalize Homepages	For more information, see <a href="#">Changing Your Homepage Layouts</a> .

**Before you begin.** The custom report that you want to enable in a Homepage must have been created and saved before you can perform this procedure.

### **To create a Homepage custom report**

- 1 In the upper-right corner of any page, click the Admin global link.

- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Homepage Layout Management section, click *record type* Homepage Custom Report.
- 5 In the Name field, enter the name of the custom report.
- 6 In the Height and Width fields, select Single or Double.

If you want the report to span the entire Homepage from left to right, set the width to Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.

**NOTE:** Reports that have an HTML RowSpan attribute value of more than 2 sometimes span beyond the specified size.

- 7 If required, select the Execute Report Immediately check box.

If you select this check box, the report will run automatically, and users will not have to click a link to update the report.

- 8 In the Report Path field, enter the path of the report.

You can paste the report path from the Open Analysis window. To copy the report path:

- a Click the Open Analysis button in the Getting Started with Answers page.
- b Select a report.
- c Copy the value in the Item field.

For example:

Company wide Shared Folder: Pre-built Analysis/Sales Stage History Analytics: Last Month Sales Report

- 9 Click Save.

## Creating Record Homepage Layouts

You can create custom Homepage layouts for all record types. This feature allows you to provide the most relevant information to different users, including the ability to display custom reports on record type Homepages. For example, you can configure the Service Request Homepage for a customer service representative to show the user's current service-request-related task and a custom service-request report.

**NOTE:** If you want to use a prebuilt or custom report in a custom Homepage layout, you must first create a Homepage custom report record for the report, using the procedure described in [Creating Homepage Custom Reports](#) (on page 100).

You can copy an existing Homepage layout and then modify it to your requirements. You can also edit existing Homepage layouts, with the exception of the default Homepage layout, which is read-only. You can copy the default Homepage layout, but you cannot delete or edit it.

After you create a custom Homepage layout, you must use the Role Management Wizard to assign the layout to the user roles that need to use that layout. Users whose role includes the Personalize Homepage privilege

can customize their own Homepage layout for a record type. The customized layout can display any of the sections that you make available to them in the Homepage layout that is assigned to the users' role for that record type.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege and the Customize Application – Manage Homepage Customization privilege.

### *To create or modify a Homepage layout*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Homepage Layout Management section, click the *record type* Homepage Layout link.
- 5 In the Homepage Layout list, do one of the following:
  - Click Edit or Copy to modify an existing layout.
  - Click the New Layout button to create a new layout.

The Homepage Layout Wizard appears to guide you through the process.

- 6 In Step 1 Layout Name, enter a name for the layout, and a description if required.
- 7 In Step 2 Homepage Layout, specify the available and displayed sections as follows:
  - Move sections from the All Sections list to the Available Sections list.

The Available Sections list includes the sections that can be added to a Homepage. If you do not want a user to be able add a section to a Homepage, leave the section in the All Sections list.
  - Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

Leave sections that are double width in the Left Side list. They automatically stretch across the Homepage when it is displayed.

- 8 Click Finish.

**NOTE:** After you add a custom Homepage layout to the application, you need to make it available to a user role before users can see it. For more information on adding and modifying user roles, see [Adding Roles](#) (on page 210). Users whose role has the Personalize Homepage privilege can edit the layout of their Homepages with any list or report you make available to them in the Homepage layout assigned to their role for that record type.

## Customizing the Audit Trail

You can track the creation, deletion, and restoration of audited fields in Oracle CRM On Demand, as well as specify which fields in the audit trail for certain record types are tracked if those record types are set up for your company. The following table lists the default audited fields. When users make updates to fields on

those record types that an administrator has marked as auditable, an audit trail record is generated that tracks information, such as the old and new value, as well as the timestamp and user who made the change.

For new customers and those upgrading Oracle CRM On Demand to this release, if you are auditing specific fields for record types, the auditing of the creation, deletion, and restoration of specific fields for record types is enabled by default. If you are not auditing specific fields for record types, all auditing of record creation, deletion, and restoration of specific fields for record types is disabled. Then customers can change these record level audit settings.

You can view all changes to company-wide auditable record types, such as those created, deleted, or restored, using the Master Audit Trail. For more information, see [Reviewing Audit Trail Changes with the Master Audit Trail](#) (on page 45).

The auditing of opportunities, service requests, and users is enabled by default. However, other record types must be configured by either enabling the record types for use with your company, or selecting the fields that you want to audit. You must ensure also that the audit trail related information for the record type that you want to audit is set to Read-only. For more information about access profiles, see [Process of Setting Up Access Profiles](#) (on page 200).

For each of the record types, you can specify that other fields, both standard and custom fields, are audited. If you want to increase the maximum number of audited fields, edit the field, Record Type Auditable Fields, in your company profile. The total number of audited fields available is also displayed in the Audited Fields Administrator Setup page.

### Auditing Takes More Time and Resources

Auditing involves additional processing to evaluate the appropriate business rules and to add the additional data to storage. As a result, the operation requires more time when you enable auditing. To minimize the impact, the initial number of auditable fields is limited to 35 for each record type. If you decide to increase the limit by editing the Record Type Auditable Fields in your company profile, the processing takes longer. The more fields you change and mark as auditable on a record type, the longer it will take to save the record.

Some record types have certain fields audited by default. However, other fields have none.

Record Type	Default Audited Fields
Account	No fields are audited by default.
Activity	No fields are audited by default.
Address	No fields are audited by default.
Application	Annual Revenue, Application ID, Approval Status, Approved Date, Campaign, Currency, Current Approver, Email Address, Existing Partnerships, Expected Partnership Benefits, First Name, Last Name, Location, Main Fax (#), Main Phone (#), Name, Number of Employees, Partner, Partner Program, Partner Type, Program Level, Reject Reason, Source, Submission Status, Work Fax (#), Work Phone (#).
Contact Field	No fields are audited by default.
Custom Objects 01 or	No fields are audited by default.



Record Type	Default Audited Fields
higher	
Deal Registration	Approval Status, Associated Contact, Associated Customer, Associated Lead, Associated Opportunity, Cell Phone, City, Close Date, Company Name, Country, Currency, Current Approver, Deal Size, Email, Expiration Date, Fax, First Name, Last Name, Name, Originating Partner Account, Partner Program, Postal Code, Principal Partner, Product Interest, Reject Reason, State, Street, Submission Status, Telephone (#), Type.
Fund	Owner, Partner, Status, Target Amount.
Fund Request	Approved, Claim Decision Date, Claim Req., Due Date, Fund, Granted, Owner, Pre-Approval Date, Pre-Approval Req., Status.
Lead	No fields are audited by default.
MDF Request	Amount PreApproved, Amount Requested, Approval Status, Claim Decision Date, Claim Status, Fund, Pre-Approval Date, Submission Status, Submitted Date, Total Claim Amount Approved, Total Claim Amount Requested.
Opportunity	Close Date, Forecast, Owner, Probability (%), Revenue, Sales Stage.
Policy	Face Amount. For more information, see Policy Fields.
Service Request	Area, Cause, Description, Owner, Priority, Source, Status, Subject, Type.
Signature	Contact
Special Pricing Request	Approval Status, Authorized Date, Claim Decision Date, Claim Decision Date, Claim Status, Submission Status, Submitted Date, Total Amount Authorized, Total Amount Requested, Total Claim Amount Approved, Total Claim Amount Req.
User	Always Send Critical Alerts, Authentication Type, Email, External Identifier for Single Sign-On, Role, Status, User Sign In ID.

The following considerations apply to fields regarding auditing:

- For Accounts, Contacts, and Custom Objects 01 or higher, ensure that the access profiles are correctly configured to have access to the audit trail child applet. Administrators must provision access to the specific roles requiring access to the audit trail child applet.
- Mandatory fields are displayed in red. You cannot save the User Audit Trail if you remove any of the selected mandatory fields.
- For foreign key fields, the name (not the ID) is stored and displayed in the audit trail. For example, if the Account relation on Opportunity is audited, the audit trail displays the account name instead of the Row ID.
- No address fields are available for any of the auditable record types.
- Picklist fields show the user's language dependent values (LDVs).

- ID columns that are not displayed on the layouts are not available for auditing.

**NOTE:** For security reasons, the default audited fields for the User record type cannot be disabled.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege and the Administer Field Audit privilege.

### *To customize the audit trail for a record type*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field audit Setup section, click the *record type* Field Audit Setup link.
- 5 (Optional) Select Audit *record type* Record Creation if you want to track the creation of records in the audit trail.
- 6 (Optional) Select Audit *record type* Record Deletion/Restore if you want to track the deletion or restoration of records in the audit trail.
- 7 In the Audit Field Setup page, move fields from the Available fields list to the Audited Fields list as required.

An error message is displayed if you exceed the company limit.

The Available Fields list contains all the standard and custom fields for the record type that are not already audited.

- 8 Click Save.  
Auditing of a field becomes effective immediately after it is enabled.

## About the Information in Modified Fields on Records

Oracle CRM On Demand uses the following system fields to store information about the most recent change to a record:

- Modified External
- Modified: Date
- Modified By
- Modified: Date External

In certain cases, Oracle CRM On Demand writes information to one or more of these fields to reflect a change to the record that is not caused by an explicit user action. For this reason, it is recommended that you do not rely on the information in these fields to track the changes that users make to records. Instead, use the audit trail feature to track the changes that users make to specific fields on records. For information about customizing the audit trail for record types, see [Customizing the Audit Trail](#) (on page 103).

The following is an example of a system change to the Modified By field on a record. A user deletes an account that is linked to a contact record as the primary account for the contact. When the deleted account record is purged from the database, the link between the deleted account and the contact is removed from the database. After the link is removed from the database, the next time that the contact record is opened by any user, Oracle CRM On Demand selects another linked account as the primary account on the contact and writes the ID of the account to the primary account field. Or, if there are no accounts linked to the contact, then Oracle CRM On Demand updates the record to reflect that. Oracle CRM On Demand then updates the Modified By field with the name of the user who opened the contact record.

## Specifying Dynamic Page Layouts

Dynamic layouts streamline the application for end users by allowing them to manage only the subset of information that is relevant in a given situation. For example, your company might track several different types of accounts, such as customer-type accounts, prospect-type accounts, or partner-type accounts. With the dynamic page layout feature, you can configure different layouts that show a different set of account fields and related items, based on the type of account. You can then associate the different layouts with one or more user roles. When the user drills down on a particular account record, the user is shown the appropriate page layout, based on the user's role and the type of account.

When you define dynamic page layouts for a record type, a pre-defined picklist value is used to drive the dynamic rendering of the page layouts. You specify a page layout to be displayed for each value of the picklist. The users can then see different page layouts for different records of the same record type, based on the picklist value that they select in the record.

You must associate your dynamic page layouts with user roles as required. There is a many-to-many relationship between dynamic page layouts and user roles.

Each picklist value has only one layout associated with it, but a page layout can be associated with multiple picklist values. There is a limit of 200 associations between picklist values and page layouts. You cannot delete a layout that is already associated with a user role.

**Caution:** It is recommended that all dynamic layouts associated with a driving picklist include the driving picklist. If one of your assigned layouts does not have the driving picklist, and the picklist value associated with that layout is selected and saved for a record, you will not see the driving picklist on the layout, and so you cannot edit the field.

The following table shows the predefined driving picklist values for each record type.

Record Type	Driving Picklist
Account	Account Type
Appointment	Type
Business Plan	Type
Campaign	Campaign Type
Contact	Contact Type
Lead	Lead Source
Opportunity	Opportunity Type
Objectives	Type

Record Type	Driving Picklist
Service Request	Type
Solution	Status
Task	Type
Fund	Status
Fund Request	Status
Household	Segment
Portfolio	Account Type
Dealer	Status
Vehicle	Product Type
Vehicle Finance Info	Finance Type
Med Ed	Type
Partner	Partner Organization Status
Partner Program	Partner Type
Revenue: Account Revenue	Type
Revenue: Contact Revenue	Type
Activity: Appointment	Type
Activity: Task	Type
Asset	Asset Type
Revenue	Type
Opportunity Product Revenue	Type
Custom Objects 01-03	Type
Custom Objects 04 or higher	Type
MedEd Event	Type
Call Activity	Type
Policy	Line of Business
Allocation	Type
Messaging Plan	Type
Inventory Audit Report	Type
Sample Transaction	Type

## Page Layouts and Lists

You can use page layouts and role privileges to limit the fields that users can search, view in lists, and export. When a user creates or refines a list of records or uses advanced search to find records, the privileges and page layouts assigned to the user's role determine which fields the user can search and view.

If the All Fields in Search and Lists privilege is enabled for the user's role, then the user can search all of the fields that are made available in the search layout that is assigned to the user's role for the record type. Also, when creating or refining a list, the user can select any field to display it as a column in the list of records that is returned by the search.

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

If the All Fields in Search and Lists privilege is not enabled for the user's role, then the user can search a field only if it meets both of the following criteria:

- The field is available in the search layout that is assigned to the user's role for the record type.
- The field is displayed on the Detail page layout that is assigned to the user's role for that record type. If dynamic page layouts are defined for the role, then the field must be displayed on at least one of the dynamic page layouts.

Also, when creating or refining a list, the user can select a field to display it as a column in the list of records that is returned by the search only if the field is displayed on at least one of the Detail page layouts, including dynamic page layouts, that are assigned to the user's role for the record type. This restriction also affects what the user can export in a list. If the List - Export Displayed Fields privilege is enabled on the user's role, but the List - Export all Fields privilege is not enabled, then the user can export only the fields that are displayed in the list. The user cannot export all fields on the records in the list.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege and the Customize Application - Manage Dynamic Layouts privilege.

### To create or modify a dynamic page layout

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Dynamic Layout Management section, click the *record type* Dynamic Layout link.
- 5 In the Dynamic Page Layout list, do one of the following:
  - Click Edit or Copy to modify an existing layout.
  - Click the New Layout button to create a new layout.

The Dynamic Layout Wizard guides you through the process.
- 6 In Step 1 Layout Name:
  - a Enter a name for the Dynamic Layout.

**b** Select a Default Layout. This layout is presented as the default layout in the next step.

The Driving Picklist field shows the picklist whose values determine which layout is seen by the users.

**7** In Step 2 Assign Layouts, associate each of the picklist values with a layout name.

**NOTE:** For each dynamic page layout, there is a limit of 200 associations between driving picklist values and page layouts.

The layout you select is displayed when a record has the corresponding picklist value.

**8** Click Finish.

## Displaying External Web Pages in Tabs

You can display Web content in a tab within Oracle CRM On Demand. The Web content can be external Web pages or company data available from the Web. For example, you might track inventory information in another Web application, which you want to make available to your service representatives when they are working in Oracle CRM On Demand. To address this requirement, you can create a custom Web tab to display your external Web application within the main content area of Oracle CRM On Demand.

You can also create custom Web applets to contain Web content. For information about custom Web applets and how they compare with custom Web tabs, see [About Custom Web Applets](#) (on page 112).

To make a custom Web page visible, you must add the tab to the required user role using the Role Management Wizard.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

Before you can display external information on an Oracle CRM On Demand page, you must ensure that:

- The external application has a Web interface
- The external application or Web page does not require full control of the browser window

**NOTE:** You must ensure Web services are enabled for your company if you plan to use features such as Single Sign On, or to integrate your Web site with Oracle CRM On Demand.

### *To display an external Web page in a tab*

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click Application Customization.
- 3** In the Application Setup section, click the Custom Web Tabs link.
- 4** On the Custom Tab List page, click New.
- 5** On the Custom Web Tab page, use the table below to fill in the required information and save the record.

- 6 (Optional) To indicate that an updated name must be translated to other languages that are activated for your company, select the Mark for Translation check box (on the Custom Web Tab Lists page) for the Web tab.

Field	Comments
Name	The name of the custom Web tab.
Type	Select URL or HTML.
User Fields	Select an option from the User Fields drop-down list to add user parameter fields to the URL or HTML field at the current position of the cursor. For example, if you choose User id from the drop-down list, %%%User id%%% is inserted into the URL or HTML field, depending on where your cursor is positioned. At run-time, this parameter is replaced with the user ID of the user who is signed in.
URL	<p><b>NOTE:</b> This setting is available only if you select URL from the Type menu.</p> <p>Enter the URL that is invoked when the user clicks the hyperlink, such as <a href="http://www.oracle.com">www.oracle.com</a>. You do not have to enter the <i>http://</i> part of the URL.</p> <p>You can also include context-sensitive parameters by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value that is based on the current record when the user clicks the value. If you do not specify any URL, then the user is directed to a void URL when clicking the tab.</p> <p>Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser when they click the Web tab.</p>
HTML Head Additions	<p><b>NOTE:</b> This setting is available only if you select HTML from the Type menu.</p> <p>The HTML that you enter is used in the src attribute of an &lt;iframe&gt; element within the HTML code of the page to which you add the Web tab. Any code that you add to the Web Tab HTML field is added to the &lt;iframe&gt; element. You can include references to JavaScript files that you embed in the &lt;head&gt; section of the HTML in this field.</p> <p>Referencing JavaScript files in Oracle CRM On Demand pages is not supported. Any content that you enter in this field is added to the &lt;head&gt; tags.</p>

Field	Comments
Web Tab HTML	<p><b>NOTE:</b> This setting is available only if you select HTML from the Type menu.</p> <p>The HTML that you enter is used in the src attribute of an &lt;iframe&gt; element within the HTML code of the page to which you add the Web tab. Any code that you add to the Web Tab HTML field is added to the &lt;iframe&gt; element. Any content that you enter in this field is added to the &lt;body&gt; tags.</p>
Description	Enter a description for the Web tab.
Height	Enter a pixel value for the Web tab.
Width	Enter a pixel value for the Web tab.
Icon	Click the Lookup icon next to the Icon label, and select an icon from the window.

**NOTE:** If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation Language list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. The updated name in blue text helps you to track which terms must be translated.

After you add a custom Web page to Oracle CRM On Demand, you must make it available to the user role before users can see it. For information on adding roles, see [Adding Roles](#) (on page 210).

## About Custom Web Applets

Custom Web applets allow you to embed external Web content within:

- A record type's Details page
- A record type's Homepage
- My Homepage
- The Action bar

You can create three types of Web applet, which allows you to embed different types of Web content:

- **Feed.** Used to embed RSS feeds. For example, you might want to embed a news feed on My Homepage.  
**Note:** Only the RSS 2.0 standard is supported.
- **HTML.** Used to embed HTML code. For example, use this Web applet to embed Web widgets from an external source such as Google Maps.



- **URL.** Used to embed the content available at the specified URL in an applet within Oracle CRM On Demand. For example, you might have a custom Web applet on the Lead Details page that allows you to see a Google search on that lead's name.

You can add a Web applet for any record type for which the Page Layout links are visible.

There are two advantages to creating a custom Web applet rather than a custom Web tab:

- A custom Web applet that is displayed on a page, such as Lead Details, allows you to view data on the Details page together with other contextual data. On the other hand, if your external data is viewed using a Web tab, when you click the Web tab, you are directed away from the Details page, and redirected to the Web tab page.
- Your company might have a great deal of information that you want to display, for example, portfolio holdings. Custom Web applets allow you to show a large amount of data from another Web site without requiring you to load information in to Oracle CRM On Demand. Loading large amounts of data in to Oracle CRM On Demand requires integration tools to manage large numbers of data columns.

For information about creating Web applets for a record type, see [Creating Web Applets](#) (on page 94). For information about creating Web applets for My Homepage, see [Creating Global Web Applets](#) (on page 119).

## Creating Custom Web Applets

You can create three types of custom Web applets (RSS feed, HTML and URL), and add them to the following places in Oracle CRM On Demand:

- For global Web applets:
  - Action bar
  - My Homepage
- For record type Web applets:
  - Record type homepage
  - Detail page

The following sections describe how to create the different types of custom Web applet.

### Creating an RSS Feed Applet

Create this type of applet for RSS feeds that you want to embed in the application. Configure RSS feed applets so that embedded content is relevant to user roles.

You can allow users to configure RSS feed applets, but it is recommended that you make only a small number of applets configurable. If you add an RSS feed applet to the Action bar, and make the records available in a custom Web tab, users can read the feeds more easily, because they do not have to navigate to a different page.

#### *To create an RSS feed applet*

**NOTE:** This is the final step in creating a Web applet, as described in the topics: [Creating Web Applets](#) (on page 94) and [Creating Global Web Applets](#) (on page 119).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Name	Name of the Web applet.
Location	The values available for this field vary depending on where you access the Web applet page. For example, if you access this page from a global Web applet, the available values are: Action Bar and Homepage.
Columns	<p><b>NOTE:</b> This field is applicable only when the Location value is Homepage.</p> <p>Specify the width of the applet by selecting single or double from the Columns menu.</p>
Type	Select Feed.
User Fields	<p>Select an option from the User Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor.</p> <p>For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At run time, this parameter is replaced with the user ID of the user who is signed in.</p>
Record Type Fields	<p><b>NOTE:</b> This field is applicable only when the Location value is Detail Page.</p> <p>Place your cursor in the URL field where you want to add a parameter, and then select the field that you want to include from the drop-down list.</p> <p>For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.</p>
URL	<p>Enter the URL that is invoked when the user clicks the hyperlink, such as <a href="http://rss.news.yahoo.com/topstories">http://rss.news.yahoo.com/topstories</a>.</p> <p>You must include <i>http://</i> in the URL.</p> <p>You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the applet calls the source URL.</p> <p>If you do not specify any URL, the user is directed to a void URL when clicking the link.</p> <p><b>NOTE:</b> Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser.</p>

Field	Comments
Let users override URL	Configure RSS feed applets for content that is relevant to user roles. While you can enable users to configure RSS feed applets, it is recommended that you make only a small number of applets configurable.
Open Records in	Select a value depending on whether you want records to open in the current browser window or a new browser window. If you want to add the RSS feed applet to the Action Bar, remember that the feeds are easier to read in a new browser window. In doing this, it prevents the user needing to navigate to a different page.
Height	The height of the applet in pixels.

## Creating an HTML Web applet

Create this type of applet for embedded content in the HTML code, to which you want to make additions.

### *To create a HTML Web applet*

**NOTE:** This is the final step in creating a Web applet, as described in the topics: [Creating Web Applets](#) (on page 94) and [Creating Global Web Applets](#) (on page 119).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Name	Name of the Web applet.
Location	The values available for this field vary depending on where you access the Web applet page. For example, if you access this page from a global Web applet, the available values are: Action Bar and Homepage.
Columns	<p><b>NOTE:</b> This field is applicable only when the Location value is Homepage.</p> <p>Specify the width of the applet by selecting single or double from the Columns menu.</p>
Type	Select HTML.

Field	Comments
Record Type Fields	<p><b>NOTE:</b> This field is applicable only when the Location value is Detail Page.</p> <p>Place your cursor in the Web Applet HTML field where you want to add a parameter, and then select the field that you want to include from the drop-down list.</p> <p>For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.</p>
HTML Head Additions	<p>The HTML that you enter is used in the src attribute of an &lt;iframe&gt; element within the HTML code of the page to which you add the Web applet. Any code that you add to the Web Applet HTML field is added to the &lt;iframe&gt; element. You can include references to JavaScript files that you embed in the &lt;head&gt; section of the HTML in this field.</p> <p>Referencing JavaScript files on Oracle CRM On Demand pages is not supported. Any content that you enter in this field is added to the &lt;head&gt; tags.</p>
Web Applet HTML	<p>The HTML that you enter is used in the src attribute of an &lt;iframe&gt; element within the HTML code of the page to which you add the Web applet.</p> <p>Any code that you add to the Web Applet HTML field is added to the &lt;iframe&gt; element. Any content that you enter in this field is added to the &lt;body&gt; tags.</p>
Always Run	This flag determines whether a custom Web applet will be executed if the applet is minimized. This flag is available only for custom Web applets that are on the Detail page.
Height	The height of the applet in pixels.

## Creating a URL Web Applet

Create this type of applet when you want to embed content from a URL in an IFrame.

### To create a URL Web applet

**NOTE:** This is the final step in creating a Web applet, as described in the topics [Creating Web Applets](#) (on page 94) and [Creating Global Web Applets](#) (on page 119).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Name	Name of the Web applet.
Location	The values available for this field vary depending on where you access the Web applet page. For example, if you access this page from a global Web applet, the available values are: Action Bar and Homepage.
Columns	<p><b>NOTE:</b> This field is applicable only when the Location value is Homepage.</p> <p>Specify the width of the applet by selecting single or double from the Columns menu.</p>
Type	Select URL.
User Fields	<p>Select an option from the User Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor.</p> <p>For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At run time, this parameter is replaced with the user ID of the user who is signed in.</p>
Record Type Fields	<p><b>NOTE:</b> This field is applicable only when the Location value is Detail Page.</p> <p>Place your cursor in the URL field where you want to add a parameter, and then select the field that you want to include from the drop-down list.</p> <p>For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.</p>
URL	<p>Enter the URL that is invoked when the user clicks the hyperlink, such as <a href="http://maps.google.com">http://maps.google.com</a>.</p> <p>You must include the <code>http://</code> part of the URL.</p> <p>You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the user clicks the value. For example, the following URL passes in the shipping address to Google maps: <code>http://maps.google.com/?q=%%%Ship_To_ADDR_Address1%%%,+%%%Ship_To_CITY_City%%%,+%%%SHIP_LIST_USSTATE%%%</code></p> <p>If you do not specify any URL, the user is directed to a void URL when clicking the link.</p> <p><b>NOTE:</b> Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see</p>

Field	Comments
	indeterminate behavior on the browser.
Always Run	This flag determines whether a custom Web applet will be executed if the applet is minimized. This flag is only available for custom Web applets located on the Detail page.
Height	The height of the applet in pixels.

**Related Topic**

The following topic provides an example of creating a Web applet that displays a Twitter RSS feed:

- [Example of Setting Up an RSS Feed Web Applet](#) (on page 120)

## Creating and Managing Action Bar Layouts

The Action bar can contain a number of sections, such as Message Center, Search, Communication Tools, and Recently Viewed. You can create custom layouts for the Action bar and assign them to specific roles in Oracle CRM On Demand.

### Making the Action Bar Unavailable to Users

By default, the Action bar appears on the left side of all Oracle CRM On Demand pages. Users can hide or show the Action bar as required. For more information, see [Showing or Hiding the Action Bar](#).

If you want the Action bar to be unavailable to a certain user role, then set up an action bar layout that is empty (that is, no sections are displayed or available in the layout), and assign that layout to the user role. The Action bar is then permanently hidden from the users who have that user role.

The following procedure describes how to add an action bar layout.

***To add a new action bar layout***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Application Setup section, select Action Bar Layout.
- 4 In Action Bar Layout, click New Layout.
- 5 In the Layout Name field, enter a name for the new action bar layout.

- 6 In the Description field, enter a name for the new action bar layout, and click Next.
- 7 Choose the fields to display in the action bar layout by moving fields from the Available Sections to the Displayed Section using the left and right arrows. Use the up and down arrows to change the order of the selected fields.
- 8 Click Finish.
- 9 (Optional) Click the Edit button to edit any of the values you entered in steps 4 to 7.

Alternatively you can copy the existing default action bar layout provided in Oracle CRM On Demand and change the description and configuration to your requirements.

### *To copy an action bar layout*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Application Setup section, select Action Bar Layout.
- 4 Click the Copy link to the left of Action Bar Layout.
- 5 In the Layout Name field, enter a name for the new action bar layout.
- 6 In the Description field, enter a name for the new action bar layout, and click Next.
- 7 Choose the fields to display in the action bar layout by moving fields from the Available Sections to the Displayed Section, using the left and right arrows. Use the up and down arrows to change the order of the selected fields.
- 8 Click Finish.

**NOTE:** To copy other action bar layouts, click the down arrow to the left of the action bar name to display the copy function.

## Creating Global Web Applets

A global Web applet is a custom Web applet that can appear on a homepage or on the Action bar.

When you create a global Web applet, you must add it to the layout for the homepage or Action bar.

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

### *To create a new global web applet*

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

- 3 In the Application Setup section, select Global Web Applets.
- 4 In the My Applet List, click New.
- 5 On the My Web Applet page, complete the following fields:

Field	Comments
Name	Enter a name.
Location	Select Homepage or Action bar, depending on whether the external content is to appear on a homepage or on the Action bar.
Always Run	This flag determines whether a global Web applet will be executed if the applet is minimized. This flag is available only for global Web applets that are on the Action bar.

Next, complete the fields according to the type of applet you require, as described in [Creating Custom Web Applets](#) (on page 113).

## Example of Setting Up an RSS Feed Web Applet

This topic gives one example of setting up an RSS feed Web applet. You might use this feature differently, depending on your business model. This example sets up an RSS feed Web applet in the contact record detail page for users who have the Field Sales Rep role. The Web applet displays the Twitter feed for the contact.

The company administrator sets up the Twitter ID field on the Contact record type and creates the Twitter Web applet. The company administrator then adds the new field and the Twitter Web applet to the page layout for the Field Sales Rep role. Users who have the Field Sales Rep role can then enter the Twitter ID for a contact in the Contact Detail page. When a user (who has the Field Sales Rep role) populates the field with the contact's Twitter ID, the Twitter RSS feed for the contact appears in the Twitter Web applet on the Contact Detail page.

**Before you begin.** To set up the Twitter ID field, create the Twitter Web applet, and add the field and the applet to the page layout, you must have the Customize Application privilege in your user role.

### *To create an RSS feed Web applet (Company Administrator)*

- 1 Set up the Twitter ID field on the Contact record type, as follows:
  - a In the upper-right corner of any page, click the Admin global link.
  - b In the Application Customization section, click the Application Customization link.
  - c In the Record Types Setup section, click Contact.



- d** In the Field Management section, click Contact Field Setup.
    - e** On the Fields page, click New Field.
    - f** In the Contact Field Edit page, enter Twitter ID in the Display Name field, and select Text (Short) in the Field Type field.
    - g** Save your changes.
  - 2** Click Back to Contact Application Customization.
  - 3** Create the Twitter Web applet, as follows:
    - a** In the Contact Application Customization page, in the Page Layout Management section, click Contact Web Applet.
    - b** In the Contact Applet List page, click New.
    - c** In the Contact Web Applet page, enter the details of the Web applet, as follows:
      - Enter a name for the Web applet, such as Contact Twitter Feed.
      - In the Location field, select Detail Page.
      - In the Type field, select Feed.
      - In the URL fields, enter the following:  
`http://twitter.com/statuses/user_timeline.rss?id=%%%stTwitter_ID%%&count=10`
      - In the Let users override URL field, select No.
      - In the Open Records In field, select Current Window.
      - In the Description field, enter a description such as Twitter Feed for Contact.
      - In the Height field, enter 200.

**NOTE:** The URL specifies that 10 lines of the feed are to be shown in the applet on the Contact Detail page (count=10). To show 10 lines, a height of 200 pixels is appropriate for the applet. If you want more than 10 lines of the feed to appear on the Contact Detail page, change the URL accordingly, and increase the height of the applet.

  - d** Save your changes.
- 4** Click Back to Contact Application Customization.
- 5** Add the Twitter ID field and the Web applet to the contact page layout for the user role, as follows:
  - a** In the Contact Application Customization page, in the Page Layout Management section, click Contact Page Layout.
  - b** In the record-level menu for the page layout that is assigned to the Field Sales Rep role, click Edit.
  - c** In Step 3, Field Layout, use the arrows to move the Twitter ID field from the Available Contact Fields section to the page section field to appear, for example, the Key Contact Information section.

- d** In Step 4, Related Information, use the arrows to move the Web applet you created from the Available Information section to the Displayed Information section.
- e** Click Finish to save your changes.

The next time a user who has the Field Sales Rep role edits a contact record, or creates a new contact record, the user can set up the Twitter RSS feed for a contact as described in the following procedure.

### ***To set up the Twitter RSS feed for a contact (User)***

- 1** Open an existing contact record, or create and save a new contact.
- 2** In the Contact Detail page, if the Contact Twitter Feed applet is not displayed on the page, add the applet as follows:
  - a** Click Edit Layout.
  - b** Use the arrows to move the Contact Twitter Feed applet from the Available section to the Displayed Information section.
  - c** Save your changes.
- 3** In the Contact Detail page, click Edit.
- 4** In the Contact Edit page, in the Twitter ID field, enter the Twitter ID for the contact.
- 5** Save your changes.

The Twitter feed for the contact appears in the Contact Twitter Feed applet on the Contact Detail page.

## Uploading Client Side Extensions

*Client side extensions* are files that you can upload to and host on Oracle CRM On Demand instead of hosting them on other servers. When you upload a client side extension, Oracle CRM On Demand generates a unique URL that you use to reference the extension. One client side extension can call a second client side extension by using the unique URL of the second client side extension, or you can also use a URL to deploy a client side extension in custom Web tabs, custom Web applets, and global Web applets.

You can upload HTML, JPG, GIF, SWF, and CSS files from the Oracle CRM On Demand Client Side Extension List page to create a client side extension. The maximum file size is 20 megabytes (MB). However, smaller file sizes provide better performance when the browser downloads these files from Oracle CRM On Demand.

**NOTE:** Oracle CRM On Demand Customer Care does not have access to any component of client side extensions. These components include the uploaded files or the content contained within those files, images, or locations from which the client side extensions are referenced, including custom Web tabs, custom Web applets, and global Web applets. Therefore, you are responsible for maintaining and supporting these extensions.

**Before you begin.** To perform this procedure, your role must include the Upload Client Side Extensions privilege. For more information on adding privileges, see [About Privileges in Roles](#) (on page 209).

**To upload a client side extension**

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Application Setup section, click Client Side Extensions.

The Client Side Extensions List page displays previously uploaded client side extensions. You can also delete previously uploaded client side extensions on this page.

**NOTE:** If you delete a client side extension that has been set up for a custom Web tab, applet, or global Web applet, then those applets will no longer function correctly because the client side extension has been removed. Oracle CRM On Demand does not indicate if a particular client side extension is in use.

- 4 Click New.
- 5 Click the paperclip icon to find the content that you want to upload as a client side extension.  
This field is required.
- 6 Enter the following details:
  - **MIME Type.** This indicates the Internet media type. This type allows the browser to display media types properly. Enter the full details of the MIME types. Enter one of the following depending on your file type:
    - text/html
    - image/jpeg
    - image/gif
    - application/x-shockwave-flash
    - text/css
  - **File: Size (In Bytes).** The size of the uploaded file. Oracle CRM On Demand populates this field.
  - **File: Extensions.** The file extension of the uploaded file. Oracle CRM On Demand populates this field.
  - **Name.** The name of the client side extension. This field is required.
  - **URL Name.** This value is used to provide a meaningful name for the URL that points to the client side extension. The following characters are accepted in the URL name: A-Z, a-z, 0-9, underscore (\_), and period (.). Double periods (..) are not permitted, and a period (.) must not be the last character in the string. Examples of URL names are: Logo\_Image and Map376. It is recommended that you keep this field as short as possible. This field changes only when a user edits it. Therefore, if you replace the uploaded file, or if you change the client side extension name, then the URL Name field value is unchanged. As a result, you can update, maintain and deploy multiple versions of the client side extension without having to reconfigure the custom Web tabs, custom Web applets, or global Web tabs. Editing this field changes the Relative URL and Full URL fields. This field is required.
  - **Relative URL.** Oracle CRM On Demand completes this field. This value is the relative URL that navigates to the client side extension from within Oracle CRM On Demand. If this field value changes, and the client side extension is deployed, then you must update the custom Web tabs, custom Web applets, or global Web tabs that reference this client side extension to use the newly generated URL. This field value changes only if the URL Name field is updated.

- **Full URL.** Oracle CRM On Demand completes this field. This value is the full URL that points to the URL in the Oracle CRM On Demand application. If this field value changes, and the client side extension is deployed, then you must update custom Web tabs, custom Web applets, or global Web tabs that reference this client side extension to use the newly generated URL. This field value changes only if the URL Name field is updated.

7 Click Save.

**NOTE:** You can upload a client side extension, but it is not active until you configure it in a custom Web tab, custom Web applet, or global Web tab.

After a client side extension is uploaded, Oracle CRM On Demand generates the Relative URL and Full URL fields. You use these values to associate a custom Web tab, custom Web applet, or global Web tab with the client side extension. You configure these locations in the same way that you configure any extension hosted on your servers.

### *To edit an existing client side extension*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Application Setup section, click Client Side Extensions.
- 4 In the Client Side Extensions List page, find the client side extension that you want to edit.
- 5 Do one of the following:
  - Click the Name field. This step opens the Client Side detail page where you can edit the client side extension.
  - Click Edit.
- 6 Click Save.
- 7 If you have replaced the file for the client side extension, do the following:
  - a Log out of Oracle CRM On Demand.
  - b Clear your browser cache.
  - c Log in again to download the new client side extension so that the client side extension is downloaded to the page deploying the client side extension. If you do not log out of Oracle CRM On Demand and log in again, the new client side extension will be downloaded 30 days after you have performed the first download.

## Guidelines for Editing Client Side Extension

Consider the following guidelines:

- **Keep the number of references to client side extensions on a page to a minimum to reduce the negative impact on performance.**

- **Keep the size of your client side extensions as small as possible.** For example, avoid using large image or SWF files. The smaller the file that you download as part of the client side extension, the faster the page loads compared to larger files.
- **Keep all client side extensions in as few files as possible to reduce the negative impact on performance.**
- **Allow your browser to cache your client side extensions.** If you allow your browser to cache the client side extensions, then the content does not have to be downloaded from the Oracle CRM On Demand servers each time that a user loads the page. If the client side extension changes, then you must clear your cache so that Oracle CRM On Demand loads the page containing the extension. By default, client side extensions are cached for 30 days.
- **Keep client side extensions and assets to a minimum to improve the Action bar performance.** When configuring a client side extension contained in an applet on the Action bar, the Action bar loads every time the page refreshes.
- **Follow all Web services guidelines when using client side extensions to call Web services.** For more information, see Oracle Web Services On Demand Guide.

## Customizing My Homepage for Your Company

Depending on their needs, employees at your company might want to see different information on their My Homepage page. You can customize the layout of My Homepage by replacing the default content with content that is more relevant to the roles of the employees. For example, you might configure the Homepage for a customer service representative to show new service requests instead of the Recently Created Leads section that is standard on that page, and a custom service-request report instead of the standard sales pipeline quality report.

After you have customized My Homepage, you must assign the Homepage layout to a user role. All users with that role see the customized My Homepage that you set up.

**Before you begin.** Because you must select a role that this customization applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customize Application privilege and the Homepage Administration privilege.

### *To customize My Homepage for your company*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Application Setup section, click the My Homepage Layout link.
- 4 In the Homepage Layout list, do one of the following:
  - Click the New Layout button to create a new layout.
  - Click Edit or Copy to modify an existing custom layout.

The Homepage Layout Wizard appears to guide you through the process.

5 In Step 1 Layout Name, enter a name for the layout, and a description if required.

6 In Step 2 Homepage Layout:

- Move sections from the All Sections list to the Available Sections list.

The Available Sections list includes the sections that can be added to a Homepage; this includes any custom reports that you have enabled for inclusion in Homepages. If you do not want a user to add a section to a Homepage, leave the section in the All Sections list.

- Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

Leave sections that are double width in the Left Side list; they will automatically stretch across the Homepage when it is displayed

7 Click Finish.

**NOTE:** After you add a custom homepage to the application, you need to make it available to the user role before users can see it. For instructions, see [Adding Roles](#) (on page 210).

## Creating New Themes

The theme determines the appearance of Oracle CRM On Demand. Several predefined themes are available when Oracle CRM On Demand is first set up for a new company, the default theme is *Oracle*. You can specify which roles can create and manage themes in the Role Management Wizard. For more information on adding roles, see [Adding Roles](#) (on page 210). For more information on specifying themes at the company level, see [Setting Up Your Company Profile and Global Defaults](#) (on page 16).

You can choose a theme at the company, role, or user level. The theme specified at the user level takes precedence, followed by the theme specified at the role level. The company default theme is applied if neither the user level nor the role level specifies a theme.

If you are upgrading themes from Oracle CRM On Demand Release 16 to a later release, note the following:

- **For new companies.** *Oracle* is the default theme at the company level. No theme is selected at the role or user level. Company administrators can create new themes and set them as the default. They can also disable existing themes so that they cannot be selected by users.
- **For existing companies.** The names of any old themes will be replaced by the following strings: *Oracle - Deprecated*, *Contemporary - Deprecated*, or *Classic - Deprecated*. It is recommended that you change these old themes, choose one of the new themes, and remove the old themes from the user profiles.
- **For existing companies that use logos and links.** An upgrade does not affect a deprecated theme, which is still selected. However, it is recommended that you do not use old (deprecated) themes, but create new themes, and set new themes as the default at the company or role level.

**Before you begin.** To create and edit themes, your user role must include the Manage Themes privilege.

The following task describes how to create your own theme in Oracle CRM On Demand.

### To create a new theme in Oracle CRM On Demand

- 1 In the upper-right corner of any page, click the Admin global link.
  - 2 In the Application Customization section, click the Application Customization link.
  - 3 In the Application Setup section, click the Themes link.
  - 4 In the Themes page, click New.
  - 5 Enter information for the following fields:
    - **Theme Name.** Enter a name for your new theme.
    - **Show Default Help Link.** Select this check box if you want your new theme to display the default Help link.
    - **Show Default Training and Support Link.** Select this check box if you want your new theme to display the default Training and Support link.
    - **Description.** Enter a description for your new theme.
  - 6 Click Save.
- Oracle CRM On Demand opens the Theme Detail page with a dynamic preview of the new theme, which is to the right of the screen. The preview shows the Home, Detail, and List pages, with the new theme applied.

- 7 Enter information for the fields listed in the following table.

SHOW ME

**NOTE:** To enter new color codes, you can either enter a hexadecimal value for each color, or move the mouse over the default color value to display the color palette icon. Click the color palette icon to select a color for this field.

General Information	Description
Application Background	This field refers to the background of Oracle CRM On Demand, including the spaces between tabs.
Application Text	This field refers to the legal statement, which is at the bottom of the application page, and the vertical bars between the global links and tab links.
Application Links	This field refers to the global links, which are at the top and bottom of Oracle CRM On Demand, for example, Admin, My Setup, Privacy Statement, Terms of Use, and so on.
Alert Text	This field refers to the text used for mandatory fields and overdue tasks.
<b>Tabs</b>	
Tab Style	Select Rounded, Stacked, or Straight from the menu.
Active Tab Text	This field refers to the text used in the active tabs.

Active Tab Background	This field refers to the background color of the active tab.
Inactive Tab Text	This field refers to the text used in the inactive tabs.
Inactive Tab Background - Top	This field refers to the color of the upper background of the inactive tab.
Inactive Tab Background - Bottom	This field refers to the color of the lower background of the inactive tab.
Inactive Tab Background Hover	This field refers to the color displayed when you place the mouse over an inactive tab. It also refers to the color used in the menu tab.
<b>Page</b>	
Page Text	This field refers to all the text on the page or pop-up window, for example, inline help, field labels, field values, page titles, inactive links, form section headers, vertical bars, bullets, and so on.
Page Links	This field refers to all the links on the page background, for example, calendar links, Show Full List link, Manage List link, and so on.
Page Background - Top	This field refers to the color of the title bar at the top of each page and pop-up window, for example, Opportunity Details. Buttons are placed on this bar. This field also controls the Action bar, Related List, Calendar view, and active Calendar tab.
Page Background - Bottom	This field refers to the color of the title bar at the bottom of each page and pop-up window, for example, Opportunity Details. Buttons are placed on this bar. This field also controls the Action bar, Related List, Calendar view and active Calendar tab.
Highlighted Page Background	This field refers to the color of the highlighted items on a page, for example, the inline edit fields, highlighted cells on a calendar, current date, active step in wizards, head-up display background, and so on.
Page Header Text	This field refers to the text color used for the page names, for example, Opportunities Homepage.
Page Header Background - Top	This field refers to the color used for the upper area behind the page names.
Page Header Background - Bottom	This field refers to the color used for the lower area behind the page names.
Page Lines	This field refers to the line colors used in the list records, form sections on detail pages, in wizard steps, and so on.
<b>Lists</b>	
List Header Text	This field refers to the text color on the filter bar and the list footer bar.
List Header Background	This field refers to the background color on the filter bar and the list footer that contains the list navigation icons.



Column Header Text	This field refers to the text color used in the column headers.
Column Header Background	This field refers to the background color on the related lists, full lists, and so on.

**8** (Optional) If you want to add customized global links to your theme, click New in the Global Links section. The Link Edit page opens.

**9** Enter the following information:

- **Link Name.** Enter the name of the global link that you want to add to your theme.
- **Type.** Select Header or Footer from the menu, depending on whether you want to place your global link at the top or bottom of your page.
- **Link URL.** Enter the URL of your global link.
- **Link Order.** Enter a value to indicate the order in which the link is displayed. For example, if you enter the number one, the link is the first link in your global links.

**10** (Optional) If you want to add a specific logo to your theme, click Add Logo in the Logo section. The Logo Edit page opens.

**11** Click Browse to locate the image that you want to use as the header logo in your theme.

**NOTE:** You can upload images to use as a header logo with the following extensions: JPEG, JPG, PNG, or GIF. The header logo must be approximately 70 pixels high and 1680 pixels wide. You must have permission to use and upload the image that you upload to your theme.

**12** Enter the following information:

- **Name.** Enter the name of the logo that you want to add to your theme.
- **Logo Type.** Select Header or Footer from the menu, depending on whether you want to place your header logo at the top or bottom of your page. If you select Header, your header logo remains in the background behind the links and tabs. If you select Footer, the footer logo is placed at the links at the bottom of the application. The footer logo must be a maximum of 200 pixels wide.

**13** Click Save.

**NOTE:** You must sign in and sign out of Oracle CRM On Demand to view the preview of the new logo that you added to the theme.

## Enabling Custom Reports in My Homepage

You can specify the custom reports that can be added to a custom My Homepage layout. These custom reports are then displayed in the Available Sections list in Step 2 in the Homepage Layout Wizard. For more information about customizing My Homepage, see [Customizing My Homepage for Your Company](#) (on page 125).

**Before you begin.** To perform this procedure, the custom reports that you want to enable in My Homepage must have been saved. Your role must include the Customize Application privilege and the Homepage Administration privilege.

### ***To specify a custom Homepage report***

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Application Setup section, click the My Homepage Custom Reports link.
- 4** In the My Homepage Custom Reports list, click New Homepage Report.
- 5** In the Name field, enter the name of the custom report.
- 6** In the Height and Width fields, select Single or Double.  

If you want the report to span the entire Homepage from left to right, set the width to Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.
- 7** If required, select the Execute Report Immediately check box.  

If you select this check box, the report will run automatically, and users will not have to click a link to update the report.
- 8** In the Report Path field, enter the path of the report.  

You can paste the report path from the Open Analysis window. To copy the report path:

  - a** Click the Open Analysis button in the Getting Started with Answers page.
  - b** Select a report.
  - c** Copy the value in the Item field.  

For example:

Shared Folder: Pre-built Analysis/Sales Stage History Analytics: Last Month Sales Report
- 9** Click Save.

## **Renaming Record Types**

To use terminology that is familiar to your users, you might want to rename record types. The default record type names in the application might not be the same as those used by your company for certain types of records. If this is the case, you can change the name to meet your specific requirements.

When you change the name of a record type, the new name appears in most places in the application, such as:

- Tabs and buttons
- Drop-down lists
- Predefined filtered lists, such as the All Accounts list on the Account Homepage
- Title bars on pages, such as on record detail and list pages

- The Create section in the Action bar
- Page section names
- Record assignment email notification
- Customized page section names

For example, you can change the Account display name to Company. The Account tab becomes Company and other section titles change accordingly.

However, there are several places in which the new name does not appear. If you change names, inform your users that the new names do not appear in:

- Custom filtered list names
- Custom field names
- Reports and Analyses
- Oracle Outlook Email Integration On Demand
- Help pages

**NOTE:** All display names have a maximum length of 50 characters.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To rename a record type*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Application Setup section, click the Customize Record Types link.
- 4 On the Customize Record Types page, type the new names in the appropriate row. You must supply all three variations for the application to use in the appropriate areas of the interface: Display Name/Singular, Display Name/Plural, and Display Name/Short.

**NOTE:** The Display Name/Short appears in the tabs, so it should not exceed 15 characters.

- 5 (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

**NOTE:** If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation Language drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previously translated display names remain, unaffected by the change you made here.

- 6 To manually enter the translated equivalent of the new name:
  - a From the Translation Language drop-down list, select the language whose translation you want to enter.

- b** Enter the translated equivalent in the appropriate Display Name field and click Save.
- c** Click the link to return to the page you just updated and select the language again, if necessary.  
The translated name appears in black text in the Display Name column.

## Changing the Icon for a Record Type

You can change the icon that is associated with a record type, and which is displayed on tabs and in the Create section in the action bar.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To change the icon for a record type*

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Application Setup section, click the Customize Record Types link.
- 4** On the Customize Record Types page, click the Lookup icon in the Icon field for the record type.
- 5** Select an icon from the window.
- 6** Click Save.

## Adding Record Types

You can add custom record types for your company. For example, you might want to display an Order tab for your employees to use. To add a new record type, you rename and configure one of the custom object record types in Oracle CRM On Demand.

Custom object record types must be made available for your company by Customer Care. For more information about setting up custom object record types for your company, contact Customer Care.

The overall steps for adding a record type to the application are:

- 1** Rename one of the custom object record types to meet your requirements.
- 2** Set up the fields for the record type. Define the fields to be displayed on the new record type detail page. A set of fields is automatically included on the Field Setup page. You can rename and use these fields and create custom fields based on your requirements.
- 3** Create page layouts for the customized record type as required.
- 4** Provide access to the new pages layout and related information sections for the appropriate user roles.

Each new record type you add appears in these areas:

- Create section in the Action bar
- Search section in the Action bar
- Record Homepage with a tab (a default icon appears in the tab along with its name)

By default, the new record Homepage contains two sections: record Lists section and Recently Viewed record section. You need to set up fields, page layouts (Detail and Edit pages), and so on, for each record type you add.

In general, new record types work in the same way as the record types provided by default. You can set up fields, page layouts, and list pages for them. Also, each new record type contains a default set of fields, including three fields to search on (the name field and two quick-search fields), and eight fields that you can filter or sort.

However, you cannot use new record types in:

- Assignment Manager
- forecasting
- audit trails
- Default Group Assignment (they cannot be shared through groups)

In addition, new record types have these restrictions:

- New record types cannot contain the country-specific address groups
- By default, only the Name field is required in new record types
- No duplicate checking is performed on the new record type

For information about using Web services with new record types, see [Downloading WSDL and Schema Files](#) (on page 543).

**Before you begin.** Note the following:

- The custom object record types must be set up for your company by Customer Care. For more information, contact Customer Care.
- To perform this procedure, your role must include both the Customize Application privilege and the appropriate Customize Application privilege for the custom object you are using for your new record type. There are individual privileges for the Custom Object 01, 02, and 03 record types, for example, the Customize Application - Manage Custom Object 01 privilege. For other custom object record types, each privilege applies to a group of custom objects, for example, the Customize Application - Manage Custom Objects 04 through 10 privilege.

### ***To add a record type***

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Application Setup section, click the Customize Record Types link.

- 4 In the row for the custom object record type that you are using, fill in the information, for example, enter Order.

For more information, see [Renaming Record Types](#) (on page 130). After you rename the record type, it appears under its new name in the Record Type Setup sections on the Application Customization page, replacing the link for the custom object record type.

- 5 Click Save.
- 6 In the Record Type Setup section on the Application Customization page, click the link for the new record type.
- 7 In the Field Management section, click the Field Setup link.

- 8 On the Field Setup page, you can do the following:

- (Recommended) Click Rename Fields and relabel the Name field.

The Name field is the field that the system displays for this record type. It appears in Deleted Items, the Recently Viewed section in the Action bar, and Lookup windows.

Throughout the application, each record type has a field called Name, which is preceded by the record type (Account Name, Opportunity Name, and so on). Therefore, if you are adding an Order tab, you could relabel the Name field to Order Name.

- Click New Fields and add custom fields.

The same restrictions exist for these record types as for custom fields for the default record types.

- Click Rename Fields and specify the fields to search on for this record type. Fill in the Quick Search 1 and Quick Search 2 rows with the required field names. If your company uses Targeted Search, then these fields are displayed in the Search section in the Action bar.

For example, if you are adding an Order tab, you might want to designate an Order Number field as one of these Quick Search fields. When an employee selects Order from the Search section, Order Number appears as a field to search on.

- Click Rename Fields and specify the fields to see as column headings in lists. Fill in the Indexed rows with the required field names. This determines the fields you can use to sort and filter records.

- 9 Set up Edit and Detail pages for the new record type.

You can add fields to the record Edit pages, group the fields into separate sections, and rename those sections.

To create relationships with other record types, add the fields (Account, Contact, Opportunity, and so on) to the page layouts. This creates a Lookup icon next to the field, where users can link existing records to this new record type.

You can add related information sections to the Detail pages.

When you add Team as a related information section, users can share this record with team members on a record-by-record basis.

**NOTE:** The Team related information section is supported on Custom Objects 01, 02, and 03 record types. It is not supported on other custom object record types.

For instructions, see [Customizing Static Page Layouts](#) (on page 89).

- 10** (Optional) Add the new record type as a field in other record Edit pages or as a related information section in other record Detail pages.
- 11** Add the page layout to user roles as required. For instructions, see [Adding Roles](#) (on page 210).

### Related Topics

See the following topic for related information:

- [About Many-to-Many Relationships for Custom Objects](#) (on page 139)

## About Fields, Picklists, and Metrics

The application does not allow you to change field names or picklist values that it uses for forecasting and reports. However, some of the prebuilt lists, such as lists on Homepages, select records to include based on the picklist values. The application uses the underlying, language-independent code to determine what records to include in the standard lists. Therefore, you can rename picklist values and fields without affecting those lists.

**NOTE:** In Oracle CRM On Demand (the standard application), the priority of tasks is indicated in task lists by arrows. An up arrow indicates 1-High priority, no arrow indicates 2-Medium priority, and a down arrow indicates 3-Low priority.

If you change the default picklist values for the Priority field on the activity record, an arrow might not be displayed in the Priority field in task lists.

## About Attachment Configurations

Depending on the record type, files can be attached to records in the following ways:

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

### About Configuring the Attachments Related Item

On record types that support the preconfigured Attachments related item, you can configure page layouts and user roles to allow users to link multiple attachments to a parent record. Each attachment item can contain either a file or a URL. To allow users to attach files and URLs in this way, the page layouts and user roles must be configured as follows:

- The Attachments section must be available as a related information section on the page layout for the parent record type.
- The user role must have the necessary permissions for the Attachment record type.
- The access profiles for the user role must have the appropriate access to the Attachments related record type in the access setting for the parent record type.

For more information about customizing page layouts, see [Customizing Static Page Layouts](#) (on page 89) and [Specifying Dynamic Page Layouts](#) (on page 107). For more information about configuring user roles and access profiles, see [User Management and Access Controls](#) (on page 140).

The following record types support the preconfigured Attachments related item:

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

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

**NOTE:** When a user deletes a parent record that has attachments linked to it through the preconfigured Attachments related item, the attachments are also deleted.

Company administrators can view details of attachments added through the preconfigured Attachments related item. For more information, see [Managing Your Company's Attachments](#) (on page 574).

### About Configuring Attachment Fields

Attachment fields allow users to attach a single file to a record. Attachment fields are supported for the following record types:

- Custom Objects 01, 02, 03, 04, and higher
- Inventory Audit Report
- Sample Transaction
- Signature

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

- Accreditation Attachment



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

- Application Attachment

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

- Business Plan Attachment

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

- Certification Attachment

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

- Course Attachment

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

- Exam Attachment

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

- MDF Request Attachment

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

- Objective Attachment

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

- Partner Program Attachment

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

- Policy Attachment

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

- Special Pricing Request Attachment

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

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

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

On some of these record types, the attachment fields are exposed on the standard page layout in Oracle CRM On Demand. You can expose the attachment fields on the Detail page layouts for all of the listed record types, as required. There are three attachment fields, as follows:

- **Attachment.** This field initially shows a paper clip icon on the record Edit page. After a file is uploaded, the field shows the name and size of the attachment file on the record Detail page. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. To allow users to attach a file to a record, you must expose this field on the page layout. The Attachment field cannot be used as a search field, because the file name and file size in this field are calculated values.
- **Attachment: File Name.** This is a read-only field that is automatically populated with the name of the file the user uploads. The Attachment: File Name field can be used as a search field. Exposing this field is optional.
- **Attachment: Size (In Bytes).** This field displays the size of the attachment. Exposing this field is optional.

For more information about customizing page layouts, see [Customizing Static Page Layouts](#) (on page 89) and [Specifying Dynamic Page Layouts](#) (on page 107).

### About Configuring Custom Objects and Attachment Fields

You can configure the Custom Object record types in a number of ways to meet your company's business needs, as follows:

- You can configure a Custom Object record type as a related record type on another record type. (Custom Object record types are supported as related record types on most of the main record types in Oracle CRM On Demand.)

In such a configuration, there is a one-to-many relationship between the parent record and the linked record type. When the attachment fields are exposed on the linked record type, this configuration allows users to link multiple attachments (one on each child record) to the parent record.

For example, you can expose the attachment fields on the Detail page for Custom Object 04, and then rename Custom Object 04 so that it is labeled *Objective Attachment*. Then, you can make the new Objective Attachment record type available as a related information section on the Objective record type.

- You can configure Custom Object record types in many-to-many relationships with other record types, see [About Many-to-Many Relationships for Custom Objects](#) (on page 139) for more information.
- You can configure a Custom Object record type for use as an attachment record type and make it available as a top-level record type, with its own tab, homepage, lists, and so on.

Such a configuration could be used to give users access to literature that is of interest to a large number of users and would also allow users to search for attachments that were uploaded to records of the custom attachment record type.

As with any record type, you must ensure that users have the appropriate access levels in their user roles and access profiles to allow them to work with the record types where attachment fields are supported. For more information about configuring user roles and access profiles, see [User Management and Access Controls](#) (on page 140).

**NOTE:** If a Custom Object record type is configured as a related record on another record type, the linked Custom Object records and the attached files are not deleted from the Oracle CRM On Demand database when the parent record is deleted. In the example described previously where a custom *Objective Attachment*

record type is linked to the Objective record type, if a user deletes the parent Objective record, the linked Objective Attachment records, and the attached files, are not deleted from the database.

## About Many-to-Many Relationships for Custom Objects

By default, all relationships between Custom Objects 01, 02, and 03 and other record types are many-to-many. However, for all other custom object record types (for example, Custom Object 04), any relationship between the custom object record type and any other record type (including other custom object record types) is one-to-many by default.

You can create many-to-many relationships for custom object record types by using another custom object record type as an intersection table.

### Example of Creating a Many-to-Many Relationship

Your company owns and manages conference centers, and provides conferencing facilities to other companies, government clients, and so on. You want to use a custom object record type to track information about events and another custom object record type to track information about the rooms that are used for each event. Each room is used for many events, and each event can use a number of rooms, so that you must have a many-to-many relationship between the record types.

To create this many-to-many relationship, you can use a third custom object record type as an intersection table to track information about each room booking, or session. You can then create a one-to-many relationship between rooms and sessions, and a one-to-many relationship between events and sessions, which gives you a many-to-many relationship between rooms and events.

The following procedure describes how to configure the record types and relationships for this example. Custom Objects 04, 05, and 06 are used for the new record types.

#### *To configure a many-to-many relationship*

- 1 If the custom object record types that you want to use are not set up for your company, contact Customer Care to have them set up.
- 2 When Customer Care has set up the custom objects, rename Custom Object 04, 05, and 06 record types to Room, Event, and Session respectively.

For information about renaming record types, see [Renaming Record Types](#) (on page 130).

- 3 For each user role that requires access to the new record types, set the required level of access in Step 2 Record Type Access of the Role Management Wizard. (The required level of access is determined by you, based on user responsibilities.)

For information about setting up user roles, see [Adding Roles](#) (on page 210).

- 4 For each user role that requires access to the new record types, configure the access profile for the new record types.

At a minimum, you must set up the following:

- On the new Room record type, grant View access to the new Session related information section.

- On the new Event record type, grant View access to the new Session related information section.

For more information about setting up access profiles, see [Process of Setting Up Access Profiles](#) (on page 200).

### 5 Create new page layouts for the new record types:

- On the new Room record type Detail page layout, include the new Session record type as a related information section.
- On the new Event record type Detail page layout, include the new Session record type as a related information section.

For more information on setting up page layouts, see [Customizing Static Page Layouts](#) (on page 89).

### 6 For each user role that requires access to the new record types, assign the page layouts that you created in Step 6 of the Role Management Wizard.

For information about setting up user roles, see [Adding Roles](#) (on page 210).

**NOTE:** In addition to the configuration changes described in the preceding procedure, you can customize the new record types in the same way that you customize other record types. For information about customizing record types, see [Record Type Application Customization Page](#) (on page 63).

## User Management and Access Controls

This topic provides information on managing users and controlling access.

**Before you begin.** Do the following:

- Make sure that you have the appropriate privileges in your user role:
  - To set up users, your role must include the Manage Users and Access privilege or the Manage Users within the Partner Organization privilege.

**NOTE:** Users who have the Manage Users within the Partner Organization privilege can set up users in their own partner organization only.
  - To set up groups, profiles and roles at your company, your role must include the Manage Users and Access privilege.
  - To set up books, your role must include the Manage Books privilege.
  - To set up territories at your company, your role must include the Manage Territories privilege.
- Compare the number of licenses against the number of users that must be active. Only active users can access Oracle CRM On Demand. The total number of active users cannot exceed the number of licenses for your company. For more information on verifying the status of licenses, see [Verifying License Statuses and Active Users](#) (on page 26).
- Read the background information on roles and access profiles. See the following topics for more information:
  - [Role Management](#) (on page 204)
  - [Guidelines for Setting Up Roles](#) (on page 205)
  - [Access Profile Management](#) (on page 168)

- [About Access Levels for Primary Record Types](#) (on page 180)
- [About Access Levels for Related Record Types](#) (on page 181)
- [Examples of Access Level Calculations](#) (on page 190)
- Determine what profiles you will use to manage data access for books, roles and teams.
- Determine the role that you want to assign to each user and to whom each user reports. If your organization requires additional roles to accommodate multiple lines of business, create the new ones that you require.

The cumulative setup of all users at your company defines your company's reporting hierarchy and sales quotas.

Individually, for each user at your company, you must specify a user role. A user's role and associated access profile determine an employee's access to tabs, features, and records. They also determine which page layouts the employee sees when using the application.

Click a topic to see the procedure for managing users, access profiles, roles, custom books, and groups:

- [Setting Up Users](#) (on page 143)
- [Setting Up Users' Sales Quotas](#) (on page 155)
- [Setting Up Default Books by Record Type for a User](#) (on page 155)
- [Changing a User's User ID](#) (on page 156)
- [Resetting a User's Password](#) (on page 157)
- [Reviewing Sign-In Activity for a User](#) (on page 157)
- [Reviewing Security-Related Activities for Users](#) (on page 158)
- [Managing Delegated Users \(Administrator\)](#) (on page 159)
- [Creating Inventory Periods for Users](#) (on page 162)
- [Deactivating Users](#) (on page 162)
- [Process of Setting Up Partner Administrators \(Administrator\)](#) (on page 163)
- [Setting Up Users \(Partners\)](#) (on page 165)
- [Changing a User's User ID \(Partners\)](#) (on page 167)
- [Resetting a User's Password \(Partners\)](#) (on page 167)
- [Deactivating Users \(Partners\)](#) (on page 168)
- [Process of Setting Up Access Profiles](#) (on page 200)
- [Adding Roles](#) (on page 210)
- [Process of Setting Up Books](#) (on page 237)
- [Verifying Book Setup for the Administrator Role](#) (on page 238)
- [Creating Book Types and Book User Roles](#) (on page 241)
- [Configuring Record Ownership Modes](#) (on page 242)
- [Creating Books and Book Hierarchies](#) (on page 243)

- [Associating Users with Books](#) (on page 244)
- [Creating Access Profiles for Books](#) (on page 247)
- [Enabling Books for Your Company](#) (on page 248)
- [Enabling Books for Users and User Roles](#) (on page 249)
- [Adding Books to Record Detail Page Layouts](#) (on page 251)
- [Assigning Records to Books](#) (on page 253)
- [Setting Up Groups](#) (on page 259)
- [Setting Up Territories](#) (on page 262)

**TIP:** Consider setting up a test user for each role. Then activate the test users to make sure the configurations are set up correctly before activating other users. Do not activate other users until you have completed all user setup activities, including access rights, role layout, reporting and data sharing hierarchy, workflow and any other business process customization. Remember to deactivate test users when testing is complete.

## User Management

A user is an entity in Oracle CRM On Demand with or without the ability to interact with Oracle CRM On Demand. For example, a user can be an employee in your company, a partner, or an external application. Users can be active or inactive. Active users can interact with Oracle CRM On Demand; inactive users cannot. To interact with Oracle CRM On Demand, an active user must be authenticated according to the sign-in and password policies set up for your company. For more information about sign-in and password policies, see [About Sign-In and Password Policies](#) (on page 27).

Each user has one assigned role. The same role can be assigned to multiple users. A role in Oracle CRM On Demand is similar to a business function that a user performs within an organization, such as a sales executive function or a service manager function. Within your organization, your business function gives you certain privileges and permissions that are unique to your business function. Similarly, within the context of Oracle CRM On Demand, a role defines the following:

- The features in Oracle CRM On Demand that a user has the privileges to use
- The set of permissions that a user is given to work with protected information
- The user interface settings that display information

For more information about roles, see [Role Management](#) (on page 204). To manage users, do the following tasks:

- [Setting Up Users](#) (on page 143)
- [Setting Up Users' Sales Quotas](#) (on page 155)
- [Changing a User's User ID](#) (on page 156)
- [Resetting a User's Password](#) (on page 157)
- [Reviewing Sign-In Activity for a User](#) (on page 157)
- [Reviewing Security-Related Activities for Users](#) (on page 158)
- [Managing Delegated Users \(Administrator\)](#) (on page 159)

- [Creating Inventory Periods for Users](#) (on page 162)
- [Deactivating Users](#) (on page 162)

### Related Topics

See the following topics for related information about user management:

- [About User Page Layouts](#) (on page 153)
- [About User Delegation](#) (on page 158)
- [User Fields](#) (on page 145)
- Viewing Audit Trails for Records
- [Customizing the Audit Trail](#) (on page 103)

## Setting Up Users

When setting up a user, the following fields require special care, because they determine what the user can access, view, and do:

- **Status field.** When you first set up a user, you can allow the user to access Oracle CRM On Demand immediately by setting the user's status to Active and prompting Oracle CRM On Demand to send the necessary sign-in information to the user when you save the user record, by selecting the appropriate option on the user record.

Alternatively, if you do not want the user to access Oracle CRM On Demand until a later time, set up the user record, and set the user's status to Inactive. When you later want to allow the user to access Oracle CRM On Demand, change the status of the user to Active, and use the reset password functionality to send the necessary sign-in information to the user by email.

- **Reports To field or Reports To (Alias) field.** The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as reports for managers and executives. The page where you set up users can contain either the Reports To field or the Reports To (Alias) field, but must not contain both of these fields. For more information about the Reports To and Reports To (Alias) fields, see [About the Reports To and Reports To \(Alias\) Fields on User Records](#) (on page 154).

**TIP:** Enter users who are at the top of the reporting hierarchy first.

- **Role field.** The user's role determines the user's access to tabs, features, records, and page layouts.

**NOTE:** You can import your user records using the import assistant. For more information about this option, see [Import and Export Tools](#) (on page 351).

## About Sign-In Information for New Users

To sign in to Oracle CRM On Demand, a new user must have a temporary URL for Oracle CRM On Demand and a temporary password. You can prompt Oracle CRM On Demand to send the sign-in information to the user at the time that you create the user account, or you can do it at a later time, as follows:

- If you want to send the sign-in information at the time that you set up the user account, select the email check box on the user record before you save the user record for the first time.

Depending on whether you use the Quick Add button or the Add User button to create the user record, the email check boxes are named as follows:

- The Email check box on the Quick Add page
- The Email Temporary Password When I Click Save check box on the User Edit page

Note that you must select the check box before you save the record for the first time if you want the information to be sent to the user immediately. The sign-in information is sent to the user by email, in two parts:

- One email contains a temporary URL.
  - The second email contains a temporary password and details of the user's sign-in ID.
- If you want to send the sign-in information to the user at a later time, do not select the email check box when you create the user record.

Later, when you want to send the sign-in information to the user, you can prompt Oracle CRM On Demand to send the information by clicking the Reset Password button on the user record. When you click the Reset Password button, the sign-in information is sent to the user by email, in two parts:

- One email contains a temporary URL.
- The second email contains a temporary password.

In this case, the email does not include details of the user's sign-in ID.

## About Deleting Users

You cannot delete users. When an employee leaves your company, change the status for that user to Inactive.

**Before you begin.** To set up users at your company, your role must include the Manage Users and Access privilege.

### *To set up a user*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, do one of the following:
  - To add a new user, click New User.
  - To add several users quickly, click Quick Add.

This opens the Quick Add page for you to enter required, limited information for each user. For example, it does not allow you to specify the reporting hierarchy.

**NOTE:** You cannot use the Quick Add method if you have defined any other required User fields in addition to those on the Quick Add page.



After entering information in the Quick Add window, click Save. This takes you to the User List page.

- To edit a user's information, click the user's last name and, on the User Detail page, click the Edit button.

**5** On the User Edit page, complete the information. For more information, see [User Fields](#) (on page 145).

**6** Save the record.

**TIP:** You can limit the user records you see by creating filtered lists. For instructions, see [Working with Lists](#).

### *To open a filtered list of users*

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3** On the User Management and Access Controls page, click the User Management link.
- 4** On the User List page, select an option from the drop-down list.

## User Fields

When setting up a user, the following fields require special care:

- Status
- Reports To or Reports To (Alias), depending on which of these fields is present on the user page layout
- Role

Entries for these fields determine what the user can access, view, and do.

This table describes some field information for users. To see all the fields listed in this table your role must include the Manage Users and Access privilege. Some fields are read-only. Also, the fields you see might differ depending on whether you access the User Detail page by navigating from the User List page, or by drilling down on a user name in a record. These differences occur because different page layouts are used for these detail pages. For more information about user page layouts, see [About User Page Layouts](#) (on page 153).

Field	Description
<b>Key User Information section</b>	
Status	<p>The status indicates whether the user is active or inactive. For information on the sequence for setting up users' passwords and activating users, see <a href="#">Setting Up Users</a> (on page 143) and <a href="#">Resetting All Passwords</a> (on page 35).</p> <p><b>NOTE:</b> Oracle CRM On Demand does not allow you to delete users. When an employee leaves your company, change the Status for that user to</p>

Field	Description
	<b>Inactive.</b>
Reports To	<p>The manager for the user. Each user must report to a manager for reporting and forecasting purposes.</p> <p><b>NOTE:</b> Depending on the user page layouts that are set up for your company, the Reports To (Alias) field might appear instead of the Reports To field. The Reports To (Alias) field shows the short identifier for the manager of the user.</p>
Partner Organization	<p>The name of the partner organization that the user belongs to. This field is populated only for users who are members of a partner organization.</p> <p><b>NOTE:</b> Users who are members of a partner organization and have the Manage Users within the Partner Organization privilege in their role can add other members of their partner organization as users in Oracle CRM On Demand. If your user role allows you to set up users who are part of your partner organization, this field is read-only.</p>
Role	The role assigned to the user. To learn about roles, see <a href="#">Role Management</a> (on page 204).
Primary Group	The group that this user has been added to. Read-only.
Default Book for Analytics	(Optional) The user book or custom book that the user sees by default in the Book selector on the Reports Homepage and the Dashboards Homepage. This setting on the user record does not limit the user's access to data. The user can select a different book in the Book selector.
Default Book	(Optional) The user book or custom book that the user sees by default in the Book selector when working in any area other than the Reports tab. This setting on the user record does not limit the user's access to records. The user can select a different book in the Book selector.
<b>User Detail Information section</b>	
Alias	<p>A short identifier for the user, for example, the user's preferred name or nickname.</p> <p>If you add users through the Quick Add page, all the characters before the at sign (@) in the email address become the alias.</p>

Field	Description
User ID	<p>A unique system identifier for the user to sign in to Oracle CRM On Demand.</p> <p>The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:</p> <ul style="list-style-type: none"> <li>■ Asterisk (*)</li> <li>■ Backslash (\)</li> <li>■ Number sign (#)</li> <li>■ Question mark (?)</li> <li>■ Slash (/)</li> <li>■ Tilde (~)</li> </ul>
Email	<p>The complete email address for the user, such as isample@companysample.com. Users must have a valid email address to be granted access to Oracle CRM On Demand.</p> <p>The maximum number of characters that the email address can contain is 100.</p>
User Sign In ID	<p>Read-only field. This value is a combination of the company sign in ID and the user ID and is the unique system identifier for the user to sign in to Oracle CRM On Demand.</p>
<b>Contact Preferences</b>	
Never Call	<p>If this check box is selected, the user does not receive calls from Oracle CRM On Demand Marketing.</p>
Never Mail	<p>If this check box is selected, the user does not receive letters or brochures from Oracle CRM On Demand Marketing.</p>
Never Email	<p>If this check box is selected, the user does not receive emails from Oracle CRM On Demand Marketing.</p>
Always Send Critical Alerts	<p>If this check box is selected, the user receives emails containing important information from Oracle CRM On Demand. These messages include:</p> <ul style="list-style-type: none"> <li>■ Critical information about product updates and service changes for Oracle CRM On Demand and related products</li> <li>■ Instructions and schedules for upgrades to</li> </ul>

Field	Description
	<p>major new releases</p> <ul style="list-style-type: none"> <li>■ High priority or emergency communications to supplement normal support processes (for example, in the case of a hardware failure)</li> </ul> <p>Only company administrators have the ability to update this check box for users. Primary contacts automatically have this check box enabled.</p> <p><b>NOTE:</b> This check box is not used to determine which users receive the system alerts issued by Oracle CRM On Demand Customer Care, such as reminders for upcoming scheduled maintenance.</p>
<b>User Geographic Information section</b>	
Language, Locale, Currency, Time Zone	<p>If you do not set any values in these fields, the default values that were set up for the company are used. You can change the values for the user. Users can also override these settings when they edit their personal preferences.</p>
<b>User Security Information</b>	
Reporting Subject Areas	<p>This setting defines the visibility to real-time subject area records in Oracle CRM On Demand Answers. The allowed values are: Manager Visibility and Team Visibility. If you do not set a value in this field, the default value that was set up for the company is used. You can change the value for the user. Users can also override this setting when they edit their personal preferences.</p>
Historical Subject Areas	<p>This setting defines the visibility to historical subject area records in Oracle CRM On Demand Answers. The allowed values are Manager Visibility, Team Visibility, and Full Visibility. If you do not set a value in this field, the default set up for the company is used. You can change the value for the user. Users can also override this setting when they edit their personal preferences. The allowed values are as follows:</p> <ul style="list-style-type: none"> <li>■ <b>Manager Visibility.</b> Allows the user to see data owned by the user and data owned by the user's subordinates.</li> <li>■ <b>Team Visibility.</b> Allows the user to see data owned by the user and data shared with the user through teams.</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>■ <b>Full Visibility.</b> Allows the user to see data owned by and shared with the user and data owned by and shared with the user's subordinates.</li> </ul>
Role-Based Can Read All Records	<p>This setting determines if Oracle CRM On Demand Reports uses the Can Read All Records setting. The Can Read All Records setting determines if a given user role has visibility to all records for a given object (for example, Account, Opportunity, Contact, and so on) in Oracle CRM On Demand. This setting is defined in the record type access page in the Role Management Wizard. If the Role-Based Can Read All Records setting is enabled on any object for a user role, then that user can also see all records for that specific object in Oracle CRM On Demand Reports.</p>
External Unique ID	<p>You can use this field to store an identifier for the user in an external system.</p>
Integration ID	<p>You can enter a value in this field, or you can allow the field to take a default value. Depending on how the user record is created, the Integration ID field takes a default value as follows:</p> <ul style="list-style-type: none"> <li>■ For user records created through the user interface: <ul style="list-style-type: none"> <li>■ If the Integration ID field is present in the Page Layout and no value is entered in the field, then the field takes the temporary Row ID allocated to the user record before the record was first saved.</li> <li>■ If the Integration ID field is not present in the user page layout, then the field takes the value of the Row ID field of the user record.</li> </ul> </li> <li>■ For user records created through any channel other than the user interface, if no value is entered in the Integration ID field, then the field takes the value of the Row ID field of the user record.</li> </ul> <p>You can change the value in the Integration ID field.</p>
External Identifier for Single	<p>If your company is set up to use Single Sign-On,</p>

Field	Description
Sign On	<p>the company administrator can use this field when mapping users in Oracle CRM On Demand to an external system, rather than using the User Sign In ID field.</p> <p>When users view their personal profile, this field is read-only.</p>
Authentication Type	<p>Determines how the user signs in to Oracle CRM On Demand.</p> <p>If the authentication type at company level is anything other than User ID/PWD or Single Sign-On, this field is read-only on the user record. If the authentication type at company level is User ID/PWD or Single Sign-On, company administrators can select a value or leave this field blank on the user record as follows:</p> <ul style="list-style-type: none"> <li>■ <b>User ID/Password Only.</b> If this value is selected, the user must sign in using their Oracle CRM On Demand User Sign In ID and password.</li> <li>■ <b>Single Sign-On Only.</b> If this value is selected, the user must sign in using your company's single sign-on mechanism. When this value is selected, the user cannot sign in using an Oracle CRM On Demand User Sign In ID and password.</li> <li>■ <b>User ID/PWD or Single Sign-On.</b> If this value is selected, the user can sign in using either their User Sign In ID and password for Oracle CRM On Demand, or through your company's single sign-on method.</li> <li>■ <b>Blank.</b> If this field is blank on the user profile, then the company-level Authentication Type setting is used for the user.</li> </ul> <p>When users view their personal profile, this field is read-only.</p> <p>For more information about setting the authentication type at company level, see <a href="#">Setting Up Your Company Profile and Global Defaults</a> (on page 16).</p>
<b>Communications Settings section</b>	
Display Click-to-Dial Popup	<p>This check box is for users who are set up with Oracle Contact On Demand. Oracle Contact On Demand renders phone numbers as links that users can click on the List and Detail pages. If you</p>

Field	Description
	select the Display Click-to-Dial Popup check box for the user, then when the user clicks a phone number link, the user is prompted with a Click-To-Dial window before the Oracle Contact On Demand telephony system places the call.
Display Communication Homepage Inbox for	Select a value from the menu to determine the period during which the Communication Homepage Inbox displays activities for the user, for example, Last Month, Last Day, and so on. The shorter the period, the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all communications. The user must sign out and sign in again for a change to this setting to take effect.
Display Communication Homepage recently completed activities for	Select a value from the menu to determine the period during which the Communication Homepage displays recently completed activities for the user, for example, Last Month, Last Day, and so on. The shorter the timeframe, the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all activities. The user must sign out and sign in again for a change to this setting to take effect.
<b>Additional Information section</b>	
Theme Name	<p>If you do not set a value in this field, the default theme for the company is used. You can override the default by clicking the Theme Name drop-down list and then selecting the desired theme for the user. Users can also override this setting when they edit their personal preferences.</p> <p><b>NOTE:</b> Themes have no effect on how Oracle CRM On Demand behaves. If your user role has the appropriate privilege, you can create new themes according to company requirements. For more information about themes, see <a href="#">Creating New Themes</a> (on page 126).</p>
Default Search Record Type	The record type that appears in the search picklist in the Action bar when the user signs in to Oracle CRM On Demand.
Show Welcome Page on Sign In	To prevent the Welcome page from appearing each time the user signs in to Oracle CRM On Demand, deselect this check box.

Field	Description
	<b>NOTE:</b> Users can also deselect the Show Welcome Page on Sign In check box in the Welcome page when they sign in.
Fund Approval Limit	<p>This field is for users of Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition.</p> <p>The amount that this user can approve for each fund request when setting the status to Claim Approved. If the user tries to exceed this limit, an error message appears, and Oracle CRM On Demand prevents the fund request approval.</p>
Enable Message Center Animation	Determines whether the display of notes in the Message Center and record Details pages is animated.
Record Preview Mode	<p>The user's record preview mode. Depending on the setting here, the preview window opens when the user hovers a pointer over a link to a record, or when the user clicks on a preview icon that appears when the pointer is hovered over a link to a record. The preview window shows the first section of the Detail page of the record. Selecting Off in this field disables the record preview functionality for the user.</p> <p>The record preview setting can be specified at company level and at user level. The setting at user level overrides the default setting for the company. If this field is blank, the default record preview setting for the company is used. Users can change this setting when they edit their personal preferences.</p>
Head-up Display	<p>If this check box is selected, the user sees links for the related information sections on a detail page at the bottom of the browser window. The links allow the user to jump to a related information section without having to scroll down the page.</p> <p>The head-up display setting can be specified at the company level and at the user level. The setting at the user level overrides the default setting for the company. If this field is blank, the default head-up display setting for the company is used. Users can change this setting when they edit their personal preferences.</p>



Field	Description
Related Information Format	Determines if the related information sections on record Detail pages are shown as lists or as tabs. If the Related Information Format option in the user's record is blank, then the default setting for the user's role is used; and if the Related Information Format option on the user role is blank, then the default setting for the company is used.
User Time Zone Support for Reporting Subject Areas	<p>If this check box is present and selected on the user's profile, then the dates and times shown in real-time reports are displayed according to the user's time zone. If this check box is deselected on the user's profile, then the dates and times shown in reports are displayed according to the company's time zone.</p> <p>To enable this setting for users, the company administrator must add this field to the User Admin page layout for the administrator's role. To allow users to enable or disable this setting in their personal profile, the company administrator must add this field to the User Owner page layout for the relevant user roles.</p>

**NOTE:** Users who have the appropriate privileges (typically the company administrator) can appoint delegates for other users. Users can also appoint delegates for themselves. For more information about appointing delegates, see [About User Delegation](#) (on page 158), [Adding Delegated Users](#), and [Managing Delegated Users \(Administrator\)](#) (on page 159).

## About User Page Layouts

You can define a number of types of page layouts for user records. The page layout types correspond to different views of the user details in Oracle CRM On Demand. The following types of user page layouts are available from the User Application Customization page:

- **User Page Layout.** This type of page layout is used for the user detail pages that are displayed when you drill down on a user name from a record or from the Recently Viewed or Favorites lists. All users in the company can see these user detail pages. No related information sections are available for the page layouts of this type, therefore there is no Edit Layout link on these user detail pages.
- **User Admin Page Layout.** This type of page layout is used for the user detail pages that are displayed from the User List page under User Management and Access Controls.
- **User Owner Page Layout.** This type of page layout is used for the Personal Detail page in My Setup. Users can control the layout of the related information sections in their Personal Detail page. For more information, see [Changing Your Detail Page Layout](#).
- **Partner Admin Page Layout.** This type of page layout is used for the user detail pages that are displayed when partner users access user records from the Partner Self Administration link. To access the Partner Self Administration link, partner users must have the Manage Users within the Partner Organization privilege.

The separate user page layout types are useful when you have user fields that contain private data. In this situation, you do not want the private fields to be visible when a user drills down on a user name from a record. You can therefore make the private fields available in the page layouts of the User Owner layout type or the User Admin layout type, but you can make the private fields unavailable in the page layouts of the User layout type.

Page layouts are assigned to particular roles. Therefore, by assigning the appropriate page layouts to a role, you ensure that users with that role cannot see any private fields that they should not be able to see.

The following are examples of the type of field that can be useful to track as private fields for particular roles:

- Inside Sales Rep
  - Number of qualified leads that are not rejected
  - Number of leads contacted for each month
- Field Sales Rep
  - Cost of converting lead to customer
- Marketing Manager
  - Campaign effectiveness (the amount spent compared with the amount of revenue)
- Regional Sales Manager
  - Number of lost customers for each quarter
  - Volume of revenue stream lost to regional competitors

The separate user page layout types are also useful when you want to make fields read-only for some users. In this case, you make the fields available as read-only fields in the page layouts of the User Owner layout type for user roles that you do not want to be able to edit the fields.

**CAUTION:** Certain restrictions apply to adding the Reports To field and the Reports To (Alias) field to user page layouts. For more information, see [About the Reports To and Reports To \(Alias\) Fields on User Records \(on page 154\)](#).

For more information about creating page layouts, see [Customizing Static Page Layouts \(on page 89\)](#); for information about setting up roles, see [Adding Roles \(on page 210\)](#).

## About the Reports To and Reports To (Alias) Fields on User Records

The manager information on a user record is used in the reporting hierarchy and in forecasting. One of the following fields must be present on each page layout of the User Admin or Partner Admin layout type so that you can specify a manager for the user:

- **Reports To.** This field shows the full name of the user's manager.
- **Reports To (Alias).** This field shows the short identifier for the user's manager.

However, when you create your user page layouts, you must not add both of these fields to the same user page layout. If the Reports To field and the Reports To (Alias) field were both made available on a page layout, then any user whose role has that page layout assigned to it cannot use the inline edit feature in lists of user records or in user detail pages.

Similarly, do not add both the Reports To field and the Reports To (Alias) field to the same search layout for the user record type. If both of these fields are made available on a search layout, then any user whose role has that search layout assigned to it cannot search for user records; that is, the search fails.

## Setting Up Users' Sales Quotas

If sales representatives use Oracle CRM On Demand to manage their forecasts, their quotas must be set up. Sales representatives can set up their own quotas or, as an administrator, you can create quotas for them.

This section describes the procedure for the administrator to set up a user's quotas.

### *To set up a user's quota*

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3** On the User Management and Access Controls page, click the User Management link.
- 4** On the User List page, click the Last Name link for the user whose quota you want to set up.
- 5** On the User Detail page, scroll down to the Quotas section and do one of the following:
  - Click the New Quota button.
  - Click the Edit link for the quota you want to edit.
- 6** On the Edit Quota page, complete the fields.
  - To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
  - To add the monthly quotas together, enter an amount for each month and click Sum.
- 7** Save the record.

## Setting Up Default Books by Record Type for a User

You can determine which book a user sees by default in the Book selector for each record type. The setting on the user record does not limit the user's access to records: the user can select a different book in the Book selector.

The following procedure describes how to set up default books by record type for a user.

### *To set up default books by record type for a user*

- 1** In the upper-right corner of any page, click the Admin global link.

- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click User Management.
- 4 On the User List page, click the Last Name link for the user whose default books you want to set up.
- 5 On the User Detail page, scroll down to the Default Book by Record Type section, and do one of the following:
  - a Click New to add a default book for a record type.
  - b Click the Edit link for the default book that you want to change.
- 6 In the Add Default Book by Record Type page, select the record type and the book setting.
- 7 Save your changes.

## Changing a User's User ID

You can change the user ID for a user.

The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:

- Asterisk (\*)
- Backslash (\)
- Number sign (#)
- Question mark (?)
- Slash (/)
- Tilde (~)

**Before you begin.** To perform this procedure, your role must include the Manage Users and Access privilege. To allow users to change their email address or user ID, you must set up the Sign In and Password Control feature. For instructions, see [Defining Your Company's Password Controls](#) (on page 28).

### *To change a user's User ID*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link of the user.
- 5 On the User Detail page, click Edit.

6 On the User Edit page, edit the User ID field.

7 Save the record.

The user receives an email containing the new user ID. The user can sign in to Oracle CRM On Demand by using the new user ID and the user's existing password.

## Resetting a User's Password

In Oracle CRM On Demand, users must provide answers to a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they are locked out and want immediate access, you can reset their password.

**NOTE:** This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before emailing the temporary password.

**Before you begin.** To perform this procedure, your role must include the Manage Users and Access privilege and the Manage Company - Reset All Passwords privilege. In addition, the role of the user whose password you want to change must include the Reset Personal Password privilege.

### *To reset a user's password*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user whose password you want to reset.
- 5 On the User Detail page, on the title bar, click the Reset Password button.

The user's existing password is replaced with a new temporary password. The new temporary password is sent to the user by email.

**NOTE:** This event is recorded in the Sign In History section on the User Detail page.

## Reviewing Sign-In Activity for a User

You can review the sign-in history for each user at your company.

**Before you begin.** To perform this procedure, your role must include the Manage Users and Access privilege.

### *To review sign-in activity for a user*

- 1 In the upper right corner of any page, click the Admin global link.

- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user whose sign-in activity you want to view.
- 5 To review the user's sign-in activity, scroll down to the Sign-in History section.

## Reviewing Security-Related Activities for Users

You can review details of security-related activities in the Audit section of the user record.

### About the Audit and Audit Trail Sections on User Records

Audit information is displayed in two related information sections on the user record, as follows:

- **Audit section.** The Audit section shows information about security-related activities, such as when the user's password was set initially and when the password was reset.
- **Audit Trail section.** The Audit Trail section on the user record shows the changes to certain fields on the user record. A number of fields are audited by default, but company administrators can specify that additional fields are to be audited. Company administrators can also view audit trail information for users in the Master Audit Trail. For information about customizing audit trails for record types, see [Customizing the Audit Trail](#) (on page 103). For information about viewing audit trails for individual records, see [Viewing Audit Trails for Records](#). For information about viewing audit trail information in the Master Audit Trail, see [Reviewing Audit Trail Changes with the Master Audit Trail](#) (on page 45).

**Before you begin.** To perform the following procedure, your role must include the Manage Users and Access privilege.

#### *To review security-related activities for a user*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user that you want to view.
- 5 Scroll down to the Audit section to review details of the security-related activities on the user record.

## About User Delegation

When the delegated users feature is enabled, users can delegate owner access of their records to other users. In addition, users who have the appropriate privileges can appoint delegates for other users. Typically, only company administrators can appoint delegates for other users.

The delegated users feature is controlled using the following check boxes on the Company Profile page:

- Manager Visibility Enabled
- Display Book Selector

For the delegated users feature to work, both of these check boxes must be selected. In addition, the Delegated To Users and the Delegated From Users related information sections must be available on the relevant page layouts for the user's or administrator's role, as follows:

- To allow a user to appoint delegates, the Delegated To Users related information section must be available on the User Owner page layout for the user's role.
- To allow a user to see a list of the users for whom the user is a delegate, the Delegated From Users related information section must be available on the User Owner page layout for the user's role.
- To allow administrators to appoint delegates for other users, at least one of the following related information sections must be available on the User Admin page layout for the administrator's role:
  - **Delegated To Users.** In the Delegated To Users section of a user's record, the administrator can appoint delegates for the user.
  - **Delegated From Users.** In the Delegated From Users section of a user's record, the administrator can appoint the user as a delegate for other users.

When appointing delegated users, note the following information:

- The Delegated User Role field is not related to the user role or to data access in any way. It is a picklist that a company administrator can define to categorize the user delegates. This picklist does not have any default values. The company administrator can customize it, as necessary, from the Delegated Users Field setup page. For more information about customizing picklists, see [Changing Picklist Values](#) (on page 87).
- Delegated users gain the primary user's owner access to the records that the primary user owns or has access to through teams or groups. Delegated users do not gain the primary user's default access to records.
- For any record type, the delegated user must have the Has Access option enabled in his or her user role to be able to see records of that type using delegated access. Similarly, the delegated user must have the Can Create option for a record type enabled in his or her user role to be able to create records of that type.
- Delegated users can use the Include sub-items option in the Book selector to see all of their own records and those of the primary user in lists. Alternatively, they can select their own name to see only the records they have access to through ownership, role, team, and so on. Or, they can select the name of the primary user to see only the records that the primary user owns or can access through a team or a group.
- The delegated user's level of access to data (that is, Manager Visibility, Team Visibility, or Full Visibility) for reporting subject areas and historical subject areas continues to apply, even when the delegated user is looking at data delegated by a primary user.

## Managing Delegated Users (Administrator)

As a company administrator, you can appoint users as delegates for other users. For more information about how user delegation works, see [About User Delegation](#) (on page 158).

**NOTE:** Users can also appoint delegates for themselves through their Personal Detail page. For more information on how users can appoint delegates, see [Adding Delegated Users](#).

To perform the procedures described in this topic, your role must include the following privileges:

- Manage Users and Access
- Manage Users and Access - Manage Delegated Users

In addition, at least one of the following related information sections must be available on the User Admin page layout for your role:

- **Delegated To Users.** In the Delegated To Users section of a user's record, you can appoint one or more delegates for the user.
- **Delegated From Users.** In the Delegated From Users section of a user's record, you can appoint the user as a delegate for one or more users.

If the Delegated To Users and the Delegated From Users related information sections are not visible in the User Detail page where you want to appoint a delegate, you can make the sections available as follows:

- In the User Detail page, click Edit Layout in the upper-right corner of the page, and add the sections to your page layout.
- If the related information section that you want is not available to add to your page layout, you can customize the User Admin page layout for your role. For more information about customizing page layouts, see [Customizing Static Page Layouts](#) (on page 89).

To appoint one or more delegates for a user, complete the steps in the following procedure.

### ***To appoint one or more delegates for a user***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click User Management and Access Controls.
- 3 On the User Management and Access Controls page, click User Management.
- 4 On the User List page, click the Last Name link for the user for whom you want to add delegates.
- 5 On the User Detail page, scroll down to the Delegated To Users section, and click Add in the title bar of that section.
- 6 On the Delegated Users Edit page, click the Lookup icon.
- 7 In the Lookup window, select the users whom you want to appoint as delegates.
- 8 If values are defined in the Delegated User Roles field, then you can optionally select a delegated user role for each user.
- 9 Save your changes.

**NOTE:** In the Delegated To Users section of the User Detail page, the Role field shows the role of the delegate in Oracle CRM On Demand. The Delegated User Role field shows the delegated user role for the delegate, if one is defined.

To remove a delegate from the list of delegates for a user, complete the steps in the following procedure.



### ***To remove a delegate from the list of delegates for a user***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click User Management and Access Controls.
- 3 On the User Management and Access Controls page, click User Management.
- 4 On the User List page, click the Last Name link for the user whose list of delegates you want to update.
- 5 On the User Detail page, scroll down to the Delegated To Users section.
- 6 In the record-level menu, select Remove for the user whom you want to remove from the list of delegates.
- 7 Click OK to confirm the change.

To appoint a user as a delegate for one or more users, complete the steps in the following procedure.

### ***To appoint a user as a delegate for one or more users***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click User Management and Access Controls.
- 3 On the User Management and Access Controls page, click User Management.
- 4 On the User List page, click the Last Name link for the user that you want to appoint as a delegate for one or more users.
- 5 On the User Detail page, scroll down to the Delegated From Users section, and click Add in the title bar of that section.
- 6 On the Delegated Users Edit page, click the Lookup icon.
- 7 In the Lookup window, select the users for whom you want to appoint the current user as a delegate.
- 8 Save your changes.

In certain circumstances, such as when a user moves to a different section within your company, you might want to revoke a user's permission to act as a delegate for one or more users. To revoke a user's permission to act as a delegate for one or more users, complete the steps in the following procedure.

### ***To revoke a user's permission to act as a delegate for one or more users***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click User Management and Access Controls.
- 3 On the User Management and Access Controls page, click User Management.

- 4 On the User List page, click Last Name for the user whose permission to act as a delegate you want to revoke.
- 5 On the User Detail page, scroll down to the Delegated From Users section.
- 6 For each user for whom you no longer want the current user to act as a delegate, select Remove from the record-level menu, and then click OK to confirm the change.

## Creating Inventory Periods for Users

This topic is specific to Oracle CRM On Demand Life Sciences Edition. You must create an inventory period for each sales representative who uses Oracle CRM On Demand Life Sciences Edition. You must do this only once for each sales representative. You can create inventory periods manually, or using the import function in Oracle CRM On Demand.

**NOTE:** Typically, inventory periods are populated through the import function when Oracle CRM On Demand is first set up for a company.

After you create the initial inventory period for a sales representative, each time an inventory period is closed for the sales representative, a new inventory period is automatically created.

**Before you begin.** To perform this procedure, your role must include the Manage Users and Access privilege.

### *To create an inventory period for a user*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link of the user.
- 5 On the User Detail page, click New Inventory Period.

The start date for the inventory period defaults to the current date.

**NOTE:** Oracle CRM On Demand does not display a message to confirm that the inventory period has been created for the user, and the User Detail page remains open. If you want to verify that the inventory period has been created, click the Inventory Period tab, and view the list of recently modified inventory periods.

## Deactivating Users

You cannot delete a user. Instead, you need to make the user inactive. You do not need licenses for inactive users.

**Before you begin.** To perform this procedure, your role must include the Manage Users and Access privilege.

### *To deactivate a user*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user you want to remove from the system.
- 5 On the User Detail page, click the Edit button.
- 6 On the User Edit page, in the Key User Information section, select Inactive in the Status field.
- 7 Save the record.

## Partner Self Administration

Company administrators can set up one or more users in a partner organization as partner administrators in Oracle CRM On Demand. Partner administrators can perform a limited set of user management task, such as setting up members of their organization as users in Oracle CRM On Demand, editing those user records, and resetting passwords or changing user IDs for those users. Partner administrators manage their users in the partner self-administration pages in Oracle CRM On Demand.

Access to the partner self-administration pages is controlled by the Manage Users within the Partner Organization privilege.

**NOTE:** Company administrators grant the Manage Users within the Partner Organization privilege to members of partner organizations. This privilege is not given to users in the brand owner company.

For information about setting up partner administrators, see [Process of Setting Up Partner Administrators \(Administrator\)](#) (on page 163). For information about managing users in the partner self-administration pages, see [Managing Users in Your Partner Organization \(Partners\)](#) (on page 164).

## Process of Setting Up Partner Administrators (Administrator)

The privilege that controls access to the partner self-administration pages is the Manage Users within the Partner Organization. This privilege allows partner administrators to work with user records for members of their own partner organization only. Partner administrators do not require and must not be granted the Manage Users and Access Privilege, because that privilege allows the partner administrator to see and edit user records for users outside his or her partner organization.

For security reasons, company administrators also determine which roles partner administrators can give to users in their partner organization. To do this, you associate roles with the partner organization record. Then, when a partner administrator sets up a user, only the roles that you have associated with the partner organization are available to be given to the user. Limiting the roles that partner administrators can grant to users enables you to ensure that partner administrators cannot give their users inappropriate privileges or access to data that the users are not supposed to see.

**NOTE:** Associating roles with a partner record limits the choice of roles that partner administrators can give to their users. It does not limit the choice of roles that company administrators in the brand owner company can assign to the users in the partner organization.

To set up a partner administrator, perform the following tasks:

- 1** In the partner administrator's user role, grant the Manage Users within the Partner Organization privilege.  
For information about granting privileges to roles, see [Adding Roles](#) (on page 210).  
**NOTE:** You can create a new role for partner administrators, or you can edit an appropriate existing role. You can also create different roles for partner administrators in the various partner organizations.
- 2** (Optional) Create a customized Partner Admin page layout for User record type, and assign it to the user's role.  
For information about creating customized page layouts, see [Customizing Static Page Layouts](#) (on page 89). For information about assigning page layouts to roles, see [Adding Roles](#) (on page 210).
- 3** (Optional) If you want to create specific roles for users in the partner organization, set up the roles.  
For information about setting up roles, see [Role Management](#) (on page 204) and [Adding Roles](#) (on page 210).
- 4** In the Partner Roles related information section on the partner organization record, add the roles that the partner administrator can grant to the users in the partner organization.  
For more information about linking records, see [Linking Records to Your Selected Record](#).
- 5** If the role that you created or edited for the partner administrator is not already assigned to the user who is to act as the partner administrator, assign the role to the user.  
For more information about assigning roles to users, see [Setting Up Users](#) (on page 143).

## Managing Users in Your Partner Organization (Partners)

**Before you begin.** To manage users in your partner organization, you must have the Manage Users within the Partner Organization privilege in your role.

You manage users in your organization in the partner self-administration pages in Oracle CRM On Demand. You access the partner self-administration pages from the global Admin link, which is available on every page in Oracle CRM On Demand.

To manage users in your partner organization, do the following:

- [Setting Up Users \(Partners\)](#) (on page 165)
- [Changing a User's User ID \(Partners\)](#) (on page 167)
- [Resetting a User's Password \(Partners\)](#) (on page 167)
- [Deactivating Users \(Partners\)](#) (on page 168)

### Related Topics

See the following topic for related information about the fields on user records:

- [User Fields](#) (on page 145)

## Setting Up Users (Partners)

**Before you begin.** To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

When setting up a user, the following fields determine what the user can access, view, and do. You must use them correctly.

- **Status field.** When you first set up a user, you can allow the user to access Oracle CRM On Demand immediately by setting the user's status to Active and prompting Oracle CRM On Demand to send the necessary sign-in information to the user when you save the user record.  
  
Alternatively, if you do not want the user to access Oracle CRM On Demand until later, you can set up the user record and set the user's status to Inactive. When you later want to allow the user to access Oracle CRM On Demand, you change the status of the user to Active, and use the reset password functionality to send the necessary sign-in information to the user by email.
- **Reports To field or Reports To (Alias) field.** The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as in the reports for managers and executives. The page where you set up users can contain either the Reports To field or the Reports To (Alias) field but must not contain both of these fields. For more information about the Reports To and Reports To (Alias) fields, see [About the Reports To and Reports To \(Alias\) Fields on User Records](#) (on page 154).

**TIP:** Enter users who are at the top of the reporting hierarchy first.

- **Role field.** The user's role determines the user's access to tabs, features, records, and page layouts.

**NOTE:** The company administrator determines which roles you can assign to users in your partner organization.

When you create a user in your partner organization, the Partner Organization field on the user record is automatically populated with the name of your partner organization, and you cannot change it.

## About Sign-In Information for New Users

To sign in to Oracle CRM On Demand, a new user must have a temporary URL for Oracle CRM On Demand and a temporary password. You can prompt Oracle CRM On Demand to send the sign-in information to the user at the time that you create the user account, or you can do it later, as follows:

- If you want to send the sign-in information at the time that you set up the user account, select the Email Password When I Click Save check box on the user record before you save the user record for the first time.  
  
You must select the check box before you save the record for the first time if you want the information to be sent to the user immediately. The sign-in information is sent to the user by email, in two parts:
  - The first email contains a temporary URL.
  - The second email contains a temporary password and details of the user's sign-in ID.
- If you want to send the sign-in information to the user later, do not select the Email Temporary Password When I Click Save check box when you create the user record.

Later, when you want to send the sign-in information to the user, you can prompt Oracle CRM On Demand to send the information by clicking the Reset Password button on the user record. When you click the Reset Password button, the sign-in information is sent to the user by email, in two parts:

- The first email contains a temporary URL.
- The second email contains a temporary password.

In this case, the email does not include details of the user's sign-in ID.

### About Deleting Users

You cannot delete users. When an employee leaves your company, change the status of that user to Inactive.

The following procedure describes how to set up a member of your organization as a user in Oracle CRM On Demand.

#### *To set up a user*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.  
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, do one of the following:
  - To add a new user, click New User.
  - To edit a user's information, click the user's last name and, on the User Detail page, click the Edit button.
- 4 On the User Edit page, complete the information.  
For more information, see [User Fields](#) (on page 145).
- 5 Save the record.

**TIP:** You can limit the user records that you see by creating filtered lists. For information on filtered lists, see [Working with Lists](#).

Any list of user records that you open shows only the users who meet the criteria in the list filter and who are members of your partner organization. The following procedure describes how to open a filtered list of users.

#### *To open a filtered list of users*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.  
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, select an option from the drop-down list.

## Changing a User's User ID (Partners)

The following procedure describes how to change the user ID for a user in your partner organization.

The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:

- Asterisk (\*)
- Backslash (\)
- Number sign (#)
- Question mark (?)
- Slash (/)
- Tilde (~)

**Before you begin.** To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

### *To change a user's user ID*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.  
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, click the Last Name link of the user.
- 4 On the User Detail page, click Edit.
- 5 On the User Edit page, edit the User ID field.
- 6 Save the record.

The user receives an email containing the new user ID. The user can sign in to Oracle CRM On Demand by using the new user ID and the user's existing password.

## Resetting a User's Password (Partners)

In Oracle CRM On Demand, users must answer a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they are locked out and want immediate access, you can reset their password.

**Before you begin.** To perform this procedure, your role must include the Manage Users within the Partner Organization privilege and the Manage Company - Reset All Passwords privilege. In addition, the role of the user whose password you want to change must include the Reset Personal Password privilege.

**NOTE:** This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before sending an email with the temporary password.

The following procedure describes how to reset the password for a user in your partner organization.

### *To reset a user's password*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.  
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, click the Last Name link for the user whose password you want to reset.
- 4 On the User Detail page, on the title bar, click the Reset Password button.

The user's existing password is replaced with a new temporary password. The new temporary password is sent to the user by email.

**NOTE:** This event is recorded in the Sign In History section on the User Detail page.

## Deactivating Users (Partners)

You cannot delete a user. Instead, you must make the user inactive. Inactive users do not require a license. The following procedure describes how to deactivate a user in your partner organization.

**Before you begin.** To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

### *To deactivate a user*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click Partner Self Administration.  
The User List page opens, showing a list of the users in your partner organization.
- 3 On the User List page, click the Last Name link for the user you want to remove from the system.
- 4 On the User Detail page, click the Edit button.
- 5 On the User Edit page, in the Key User Information section, select Inactive in the Status field.
- 6 Save the record.

## Access Profile Management

In Oracle CRM On Demand, you manage access profiles in the Access Profiles List page and in the Access Profile Wizard. You access the access profile pages from the global Admin link, which is available on every page in Oracle CRM On Demand.



An *access profile* in Oracle CRM On Demand is a named collection of permissions on primary record types and related record types.

A *primary record type* is a record type that can be used as an independent record type. A *related record type* is a record type that must have a parent record.

Many primary record types can also be used as related record types. For example, Opportunities is a related record type. It is based on the Opportunity primary record type and is related to parent account records that are based on the Account record type.

A *permission* is the ability to read, create, update, or delete data on records that are instances of record types. Permissions are also referred to as access rights or access levels. For each record type, such as accounts, contacts, service requests, and so on, you can set up permissions for the record type itself. For some record types, you can also set up permissions for related record types.

You can set up many access profiles consisting of different permissions for primary record types and related record types. To grant these permissions to authenticated users (including external systems), you associate the access profiles with roles, books, teams, and groups.

Oracle CRM On Demand provides a set of predefined access profiles. The following are some of the standard access profiles:

- Edit
- Full
- ReadOnly
- Administrator Default Access Profile
- Administrator Owner Access Profile

Typically, access profiles are named to distinguish between default access profiles and owner access profiles. (In the list of predefined access profiles, there are pairs of access profiles with the terms *Default* and *Owner* in their names.) These terms help you to identify which access profiles to use in the access profile assignments on user roles, where an owner access profile and a default access profile must be assigned.

The Edit, Full, and ReadOnly access profiles are generic access profiles that can be granted to any role, team, or book member. For example, you can assign the Full access profile to the Owner Access Profile of the Administrator role. This profile gives a user who has the Administrator role the ability to create related records on top-level records, and to retrieve, update, or delete records of all primary record types and their related record types.

You can use the predefined access profiles, edit the existing access profiles, and create custom access profiles to meet the requirements of your company. When creating a new access profile, you have the option of copying an existing access profile, giving it a new name, and then editing the copy to meet your requirements.

To view, create or revise access profiles at your company, your role must include the Manage Users and Access privilege. It is recommended that only company administrators are given the privilege required to manage access profiles, because access profiles directly affect the security of protected data.

### Related Topics

See the following topics for related information:

- [About Access Profiles in Roles](#) (on page 170)
- [About Access Profiles in Teams, Groups, and Books](#) (on page 171)

- [About Access Propagation Through Team Inheritance](#) (on page 172)
- [How Access Rights for Displaying Primary Record-Type Records are Determined](#) (on page 174)
- [How Access Rights for Working with Primary Record-Type Records are Determined](#) (on page 174)
- [How Access Rights for Displaying Related Record-Type Records are Determined](#) (on page 176)
- [How Access Rights for Working with Related Record-Type Records are Determined](#) (on page 178)
- [Working with the Access Profile List Page](#) (on page 179)
- [About Access Levels for Primary Record Types](#) (on page 180)
- [About Access Levels for Related Record Types](#) (on page 181)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## About Access Profiles in Roles

Each role in Oracle CRM On Demand has two access profile assignments:

- A default access profile assignment
- An owner access profile assignment

You can assign an access profile to multiple roles, and you can assign the same access profile to be both the default access profile and the owner access profile on a role. For example, you can assign the Full access profile (one of the predefined access profiles) as the default and owner access profiles for the Administrator role.

You assign access profiles to a role in step 3 of the Role Management Wizard. For more information about adding roles, see [Adding Roles](#) (on page 210).

### Default Access Profile

The default access profile on a role controls the access rights of a user to records that are not owned by that user, but are visible to the user because the Can Read All Records option is selected for the relevant record type in the record-type access settings on the user's role.

If the Can Read All Records check box on the user's role is deselected for a record type, the user has no access to that record type through the role, and the default access profile on the user role is never used for that record type.

According to the naming convention for access profiles, access profiles that are set up to be assigned as default access profiles are named as follows:

*role name* Default Access Profile

where:

- *role name* is the name of the role where the access profile is to be used.

For example, the name *Administrator Default Access Profile* indicates that this access profile controls access rights to record types and their related record types for the Administrator role.

### Owner Access Profile

The owner access profile on a role controls the access rights of a user to records that are owned by that user or owned by a subordinate of the user.

According to the naming convention for access profiles, access profiles that are set up to be assigned as owner access profiles are named as follows:

*role name* Owner Access Profile

where:

- *role name* is the name of the role where the access profile is to be used.

For example, the name *Service Manager Owner Access Profile* indicates that this access profile controls access rights to record types and their related record types for the Service Manager role.

### Related Topics

See the following topics for related information about access profiles:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

See the following topics for related information about roles:

- [Role Management](#) (on page 204)
- [Guidelines for Setting Up Roles](#) (on page 205)
- [Working with the Role List Page](#) (on page 206)
- [About Record Type Access in Roles](#) (on page 207)
- [About Access Profiles in Roles](#) (on page 170)
- [About Privileges in Roles](#) (on page 209)
- [Adding Roles](#) (on page 210)

## About Access Profiles in Teams, Groups, and Books

Access profiles are used to give access rights to users who are members of teams or groups (through user books), and to users who are associated with custom books. (Access profiles are also assigned to roles, as described in [About Access Profiles in Roles](#) (on page 170).) Assigning access profiles to users for teams and books allows users to access records that they would not be able to access if they were restricted to the access rights provided by the access profiles assigned to their role.

**NOTE:** In Oracle CRM On Demand, a default book is assigned to each user and bears the user's name. When a record is assigned to a user, the record is assigned to the user's default book. Where a record is owned by a team, the team represents the set of default books of the users who are members of the team. When a user becomes a member of a team, the user book for that user is added to the set of user books that makes up the team. User books are automatically associated with records when the record owner is changed and when team membership is changed.

*Groups* are predefined teams that are supported for certain record types. When the owner of a record is a member of a group, other members of that group are automatically added to the team on that record. When the group members are added to the team, their access profile in the team is set to Full. The owner of the record can then edit the team access profile assignment of each group member and assign a different team access profile to that user.

Each user book in a team must be given an access profile that controls the user's access rights to the records that they can access through their membership of the team. You can make any access profile available for assignment to team membership by selecting the Grantable to Team Members check box on the access profile.

Similarly, each user associated with a custom book must be given an access profile that controls the user's access to records in that custom book. You can make any access profile available for assignment to a user's association with a book by selecting the Grantable to Book Users check box on the access profile.

For more information about user books and custom books, see [Book Management](#) (on page 215).

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## About Access Propagation Through Team Inheritance

Team inheritance is available as an option for contacts and opportunities that are related to a parent account. Team inheritance is not supported for any other type of team relationship.

**NOTE:** When a user becomes a member of a team, the user book for that user is added to the set of user books that makes up the team.

Team inheritance is controlled by the Enable Parent Team Inheritance check box on the Company Profile page. If the Enable Parent Team Inheritance check box is selected on the Company Profile page, then membership of account, contact, and opportunity teams is inherited as follows:

- When a contact is related to a parent account:
  - Each account team member (including the account owner) becomes a member of the contact team, provided that an access profile is specified in the Contact Access field in the user record on the account team.
  - The owner of the account is granted the Full access profile for membership of the contact team by default, even if the Full access profile is deactivated.
- When an opportunity is related to a parent account:
  - Each account team member (including the account owner) becomes a member of the opportunity team, provided that an access profile is specified in the Opportunity Access field in the user record on the account team.
  - The owner of the account is granted the Full access profile for membership of the opportunity team, even if the Full access profile is deactivated.

- When a new member is added to an account team:
  - The new member also becomes a member of the contact team for each contact related to the account, provided that an access profile is specified in the Contact Access field in the user record on the account team.
  - The new member also becomes a member of the opportunity team for each opportunity related to the account, provided that an access profile is specified in the Opportunity Access field in the user record on the account team.
- When an account owner is changed:
  - The new owner becomes a member of the opportunity and contact teams for all related opportunity and contact records.
  - The previous account owner remains on the opportunity and contact teams where the previous account owner was already added.
- When a user is removed from an account team, the user remains a member of the opportunity and contact teams where the user was added through team inheritance.

Team inheritance might grant too much access to the account team members who become members of contact and opportunity teams on related contacts and opportunities. If so, then you can deselect the Enable Parent Team Inheritance check box on the Company Profile page to disable team inheritance.

If the Enable Parent Team Inheritance check box on the Company Profile is deselected, then membership of account, contact, and opportunity teams behaves as follows:

- The contact and opportunity access fields in the user records on account teams are not displayed.
- Users added as new members of account teams are not added to the contact and opportunity teams on the contacts and opportunities added to the account.
- If the Enable Parent Team Inheritance check box was previously selected on the company profile, users who became members of teams through the team inheritance feature, remain as members of those teams.

**NOTE:** Oracle CRM On Demand does not distinguish between users who are added to a team through the team inheritance feature, and users who are added to a team manually (that is, the user books that are added to a team through the team inheritance feature are treated the same as user books that are added to a team manually).

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## How Access Rights for Displaying Primary Record-Type Records are Determined

When a user tries to view a list of records of a primary record type by clicking a tab, or performing a search, or using a Web service, Oracle CRM On Demand uses the following process to determine the access rights of the user to records of that record type:

- Oracle CRM On Demand determines the permissions given to the user by the privileges on the user role.
- Oracle CRM On Demand determines the permissions given to the user by the record-type settings on the user role (Has Access, Can Create, and Can Read All Records).

If the user's privileges allow the user to work with records of a given record type, and the Can Read All Records setting is selected for the record type on the user role, the user can see all records of that record type.

If the user's privileges allow the user to work with records of a given record type, but the Can Read All Records setting is deselected for the record type on the user role, the user can see any records of that record type that the user owns, as well as any records of that record type that the user is authorized to see through any of the following access-control components:

- The reporting hierarchy
- Membership of custom books
- User delegation
- Team membership

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## How Access Rights for Working with Primary Record-Type Records are Determined

When a user tries to update, delete, or drill down to see more details on a primary record, Oracle CRM On Demand uses the following process to determine what actions the user can perform on the record:

- Oracle CRM On Demand determines the access levels granted by the access profile on the user's role:
  - If the user is the owner of the record, the user's owner access profile is used.
  - If the user is not the owner of the record, but the Can Read All Records option is selected for the record type on the user's role, the user's default access profile is used.
- Oracle CRM On Demand determines the access levels granted by each of the following access-control components:
  - The reporting hierarchy

- Membership of custom books
- User delegation
- Team membership

More information about how Oracle CRM On Demand determines the access levels granted by the reporting hierarchy, membership of custom books, user delegation, and team membership is provided in the rest of this topic. Oracle CRM On Demand always uses the most permissive level of access from each of these access-control components, so keep this in mind when you create access profiles and assign them to users, books, and teams.

The combination of the access permissions for the record determines what actions the user can perform on the record. If the user has at least read-only access to the record, the record details are displayed. Otherwise, the user sees an error message.

### Access Rights from the Reporting Hierarchy

To determine the access rights that can be granted through a user's position in the reporting hierarchy, Oracle CRM On Demand considers the following for each subordinate of the user:

- If the subordinate is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the current user.
- If the subordinate is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the subordinate as a team member.

**NOTE:** If the subordinate is not the record owner or a member of the team for the record, the subordinate does not contribute to the access calculation.

Oracle CRM On Demand then considers all of the access rights that subordinates contribute to the access calculation and calculates the most permissive access level that can be given to the user.

### Access Rights from Membership of Custom Books

To determine the access rights that can be granted through a user's membership of custom books, Oracle CRM On Demand considers the following:

- If the record is associated with a book, then Oracle CRM On Demand extracts the access level for the record type from the access profile assigned to the user who is a member of the book.
- If the record is associated with a child book in a book hierarchy with multiple levels, such as grandparent, parent, and child, then the access level is extracted as follows:
  - If the user is a member of all three books, then the access level is derived from the access profiles of the user from each of the grandparent, parent and child books.
  - If the user is a member of the grandparent book only, then the access level is derived from the access profile of the user from the grandparent book.

In all cases, if one or more of the access levels for the record is Inherit Primary, then the inherited access level of the primary record type is used. If more than one access level for the record is Inherit Primary, then a union of the inherited access levels of the primary record types from each access profile is used. Oracle CRM On Demand then considers all levels of access that book membership contributes to the final access calculation and determines the most permissive access level that can be given to the user.

### Access Rights from User Delegation

To determine the access rights that can be granted through user delegation, Oracle CRM On Demand considers the following for each delegator (that is, each user for whom the current user is a delegate):

- If the delegator is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the delegator.
- If the delegator is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the delegator in the team.
- If the subordinate of the delegator is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the subordinate.
- If a subordinate of a delegator is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the subordinate in the team.

Oracle CRM On Demand then considers all levels of access that user delegation contributes to the access calculation and determines the most permissive access level that can be given to the user.

### Access Rights from Team Membership

If the user is a team member on a record (but is not the owner of the record), Oracle CRM On Demand extracts the access level for the primary record type from the access profile on the user's team membership.

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## How Access Rights for Displaying Related Record-Type Records are Determined

When a user successfully views the Detail page for a record, Oracle CRM On Demand uses the following process to determine which related records the user can see:

- Oracle CRM On Demand verifies that the user's role has the necessary privileges to view the record type. If the user's role does not have the necessary privileges to view the record type, the records of this related record type are not shown.
- If the related record type is based on a primary record type, Oracle CRM On Demand verifies that the Has Access check box for the related record type is selected. If the Has Access check box is deselected for the related record type, the records of this related record type are not shown.
- If the owner of the parent record is the current user, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is the current user's subordinate at any level in the reporting hierarchy, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.



- If the owner of the parent record is an unrelated user:
  - If the Can Read All Records option is selected for the related record type on the current user's role, Oracle CRM On Demand extracts the access level for the related record type from the current user's default access profile.
  - If the Can Read All Records option is deselected for the related record type on the current user's role, the current user's default access profile is not used.

In this case, the current user gains access to the Detail page of the parent record in one or more of the following ways:

  - The current user is a member of the team on the parent record.
  - The current user has a direct or indirect subordinate who has access to the parent record.
  - The current user is a member of a book that contains the parent record, or the parent record is in a subbook of a book where the current user is a member.
  - The current user has been delegated by another user who has access to the parent record.

Oracle CRM On Demand therefore extracts the access levels for the related record type from the access profiles for the parent record through each of the applicable access-control components.
- Oracle CRM On Demand then evaluates all the related access levels to determine if the Inherit Primary access level is present in the set of access levels and determines what records to display, as follows:
  - If the Inherit Primary access level is not found:
    - If the most permissive access level is No Access, then the related records are not shown.
    - If the most permissive access level is anything other than No Access, then all related records are shown, including records the current user is not authorized to see.
  - If the Inherit Primary access level is found, and the Can Read All Records check box is selected for the related record type in the current user's role, then all related records are displayed.
  - If the Inherit Primary access level is found, and the Can Read All Records check box is deselected for the related record type in the current user's role, then the set of related records that is shown includes all records where any one of the following is true:
    - The current user owns the related record.
    - The current user is a member of the team on the related record.
    - The current user has a direct or indirect subordinate who has access to the record.
    - The current user is a member of a book that contains the related record, or the related record is in a subbook of a book where the current user is a member.
    - The current user has been delegated by another user who has access to the related record.

**NOTE:** The Activities, Open Activities, and Closed Activities related record types are exceptions to the rules stated above. If the Inherit Primary access level is found for an activities related record type, and the Can Read All Records check box is deselected for the Activity record type in the current user's role, then the set of related activities that is shown includes only the activities that the user owns, activities that the user delegated to another user, and activities that are owned by a group that includes the user. Activities that the current user can access only through books, activities that the current user can access only

because the user is a delegate for another user, and activities that the current user can access only through the reporting hierarchy are not included in the set of related activities.

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## How Access Rights for Working with Related Record-Type Records are Determined

When a user attempts to update, delete, or drill down to see more details on a related record, Oracle CRM On Demand uses the following process to determine what actions the user can perform on the record:

- If the owner of the parent record is the current user, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is the current user's subordinate at any level in the reporting hierarchy, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is an unrelated user:
  - If the Can Read All Records option is selected for the related record type on the current user's role, Oracle CRM On Demand extracts the access level for the related record type from the current user's default access profile.
  - If the Can Read All Records option is deselected for the related record type on the current user's role, the current user's default access profile is not used.

In this case, the current user gains access to the Detail page of the parent record in one or more of the following ways:

- The current user is a member of the team on the parent record.
- The current user has a direct or indirect subordinate who has access to the parent record.
- The current user is a member of a book that contains the parent record, or the parent record is in a subbook of a book where the current user is a member.
- The current user has been delegated by another user who has access to the parent record.

When access to the related record is granted through the context of the parent record, Oracle CRM On Demand extracts the appropriate access level for the related record type from the access profiles for each of the applicable access-control components.

- For the related record, Oracle CRM On Demand also extracts the access levels from the current user's relationship to the related record where any one of the following is true:
  - The current user is a member of the team on the related record. If the current user is the owner of the related record, the user is also on the team, therefore the owner access profile is used.
  - The current user has a direct or indirect subordinate who has access to the related record.

- The current user is a member of a book that contains the related record or the related record is in a subbook of a book where the current user is a member.
- The current user has been delegated by another user who has access to the related record.
- Oracle CRM On Demand then evaluates all the applicable access levels to determine if the Inherit Primary access level is present in the set of access levels:
  - If the Inherit Primary access level (or any of its combinations) is found in the set of applicable access levels, the related record type inherits the role settings of its own primary record type as well as the access settings. The Inherit Primary access level setting determines the actions the user can perform on the records. If Oracle CRM On Demand finds two or more Inherit Primary access levels, the combination of the access levels is determined. For more information about the Inherit Primary access level and its combinations, see [About Access Levels for Related Record Types](#) (on page 181).
  - If the Inherit Primary access level (or any of its combinations) is not found in the set of applicable access levels, then, if the related record type has a corresponding primary record type, Oracle CRM On Demand determines the intersection of the access levels for the primary record type and the related record type.

For example, if the access level for the Opportunities related record type is Read-Only, and the access level for its corresponding Opportunity primary record type is Read/Edit, then the intersection of the access levels is Read-Only.

The combination of all the resulting access levels for the related record type determines what actions the user can perform on records of that record type.

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## Working with the Access Profile List Page

On the Access Profile List page, you can perform the actions in the following table.

To do this	Follow these steps
Add a new access profile	<p>In the title bar of the Access Profile List page, click New. The Access Profile Wizard opens.</p> <p>For more information about using the Access Profile Wizard, see <a href="#">Process of Setting Up Access Profiles</a> (on page 200).</p>
Add a new access profile by copying an existing access profile	<p>In the record-level menu beside the access profile name, select Copy. The Access Profile Wizard opens.</p> <p>For more information about using the Access Profile Wizard, see <a href="#">Process of Setting Up Access Profiles</a> (on page 200).</p>
Disable an access	Select the Disabled check box for the access profile.

To do this	Follow these steps
profile	When you disable an access profile, it cannot be used in any new associations with roles, teams, or books. However, the disabled access profile continues to function as the access profile where it has been associated previously with a role, team, or book until you assign a different access profile to the role, team, or book.
Select a language for viewing the list of access profiles	<p>In the title bar of the Access Profile List page, in the Translation Language field, select the language in which you want to view the list of access profiles. You can view the list in any of the languages that are supported for your company in Oracle CRM On Demand.</p> <p><b>NOTE:</b> If an existing access profile does not have a translated access profile name, the name of the access profile is not translated and appears in brackets.</p>

You can use Alpha Search to filter the list of access profiles. For more information about Alpha Search, see [Filtering Lists](#).

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## About Access Levels for Primary Record Types

You grant or revoke access rights to primary record types by setting the access levels in step 2 of the Access Profile Wizard. For more information about using the Access Profile Wizard, see [Process of Setting Up Access Profiles](#) (on page 200).

Access levels are the lowest level of permissions that can be granted for a record type. For each primary record type, you specify the access rights for any user who inherits this access profile through one or more of the access-control components (roles, reporting hierarchy, teams, and books). For example, when a user drills down on an opportunity from an opportunity list, the access rights that allow the user to see the opportunity details and to perform operations are controlled by the access level for the Opportunity primary record type in step 2 of the Access Profile Wizard.

The description in this section of the access levels for primary record types pertains to the functionality of the access levels as they operate individually. The records that a user can view and the operations that a user is allowed to perform on records are controlled by a combination of one or more access levels that are applied to the records through one or more access profiles.

Record types that are controlled through special privileges appear in all access profiles with the access level set by default. For primary record types, the default setting is Read-Only. You must change the default setting to give your users the access level that they require for the various record types.

The access level for each primary record type can be set to one of the following:

- **Read-Only.** The Read-Only access level prevents the user from performing operations such as edit or delete on the primary record.
- **Read/Edit.** The Read/Edit access level allows the user to view and edit primary records.
- **Read/Edit/Delete.** The Read/Edit/Delete access level allows the user to view, edit, and delete primary records.

**NOTE:** Permission to create records of a primary record type is not controlled by the settings in step 2 of the Access Profile Wizard. The permission to create records of a primary record type is controlled by the settings in step 2 of the Role Management Wizard. For more information about roles, see [Role Management](#) (on page 204).

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## About Access Levels for Related Record Types

You grant or revoke access rights to related record types in step 2 of the Access Profile Wizard. For more information about using the Access Profile Wizard, see [Process of Setting Up Access Profiles](#) (on page 200).

Related record types that are controlled through special privileges appear in all access profiles with the access level set to No Access by default. You must change the default setting to give your users the level of access that they require to the various record types.

For example, the Custom Object 04 record type is a related record type on the parent Opportunity record type. In the Full access profile, the Custom Object 04 related record type has its access level set to No Access by default. As a result, a user who is on an opportunity team with the Full access profile cannot see the related record types based on the Custom Object 04 related record type. If you want the user to see the Custom Object 04 records on opportunity records, you must change the default access level.

This topic describes the following:

- Record Relationships
- Access Level Options for Related Record Types

### Record Relationships

The relationship between a parent record type and its related record type (the child record) determines the access-level options that are available for assignment to the related record type.

The relationships types and the available access level options are as follows:

- **One-to-Many Relationship.** In a one-to-many relationship, the child records are based on a primary record type, and one parent record can have many child records. For example, in the Account Related Information page, Opportunities is a related record type that has a corresponding primary record type called Opportunity. The following access levels are available for the one-to-many relationship:

- View
- Read-only
- No Access
- Inherit Primary

**NOTE:** The Inherit Primary access level is available for certain one-to-many relationships only.

- **One-to-Child Relationship.** The one-to-child relationship is similar to the one-to-many relationship, in that a parent record can have many child records. However, in a one-to-child relationship, the child records are based on a record type that does not have a corresponding primary record type. Attachments, Notes, and Teams are some examples of related record types that do not have a corresponding primary record type.

**NOTE:** An exception to this rule is the relationship between contact child records on an opportunity. Although the Contact record type has a corresponding primary record type, the relationship between the opportunity and the contacts is a one-to-child relationship. Users can add existing contacts to an opportunity, or remove contacts from an opportunity. Users cannot create new contacts from an opportunity.

The following access levels are available for the one-to-child relationship:

- Read/Create
- Read/Create/Edit
- Read/Edit
- Read/Edit/Delete
- Read-Only
- No Access
- Full

- **One-to-Read-Only Relationship.** The one-to-read-only relationship is similar to the one-to-child relationship. However, as the name of the relationship suggests, users cannot edit or create the child records in a one-to-read-only relationship. Audit Trail is an example of a related record type that does not have a corresponding primary record type. Oracle CRM On Demand creates the Audit Trail record type. The following access levels are available for the one-to-read-only relationship:

- Read-Only
- No Access

- **Many-to-Many Relationships.** The many-to-many relationship is a relationship between two primary record types in which the records of each record type can be the parent or child of the other, depending on how you view the relationship. For example, an account can have many contacts. Conversely, a contact can have many accounts. The following access levels are available for the many-to-many relationship:

- Read/Create
- Read-Only
- View
- No Access
- Inherit Primary

- Add/Inherit Primary
- Add/Remove/Inherit Primary

**NOTE:** The Add/Inherit Primary and Add/Remove/Inherit Primary access levels are available for selected many-to-many relationships only.

## Access Level Options for Related Record Types

The full set of access level options for related record types is as follows:

- **No Access.** The No Access option is available for all related record types. It prevents the user from viewing records in a related list.
- **Read-Only.** The Read-Only access level prevents the user from editing the related records inline on the parent record.
- **Read/Create.** The Read/Create access level is available for related record types that are one-to-child records or are part of many-to-many relationships. For one-to-child records, the Read/Create access level allows the user to create a new record or drill down on existing records to view the details, but it does not allow the user to edit or delete records. For many-to-many relationships, the Read/Create access level allows the user to associate an existing record as a child on a parent record, but it does not allow the user to remove an existing association.
- **Read/Create/Edit.** The Read/Create/Edit access level is available for related record types that are one-to-child records. It allows the user to create a new record or drill down on existing records to view the details and edit the record if required. The Read/Create/Edit access level does not allow the user to delete child records.
- **Read/Edit.** The Read/Edit access level is available for all relationships except related records that are read-only in one-to-read-only relationships. The Read/Edit access level allows the user to view and edit related records.
- **Read/Edit/Delete.** The Read/Edit/Delete access level is available for related record types that are child records in one-to-child relationships. The Read/Edit/Delete access level allows the user to drill down on existing records to view the record details, to edit the record, or to delete the record. The Read/Edit/Delete access level does not allow the user to create new child records.
- **Full.** The Full access level is available for related record types that do not have a corresponding primary record type. For such record types, the Full access level allows the user to create, view, edit, and delete records.
- **View.** The View access level is available for related record types in one-to-many and many-to-many relationships only. With the View access level, the behavior of the related records is as follows:
  - All the child records that are related to a parent record are shown in the list of related records, irrespective of whether the user is authorized to see the child records themselves.
  - Each related record inherits the access level from its own primary record type rather than the access level of the parent record type in the relationship.

For example, if the access level is set to View for the related Opportunity record type on the Account parent record type, then the behavior of the related opportunity records is as follows:

- All opportunities that are related to a parent account record are shown in the list of related records, irrespective of whether the user is authorized to see the opportunity records.

- Each opportunity record inherits the access level from the primary Opportunity record type and not from its parent Account record type. When a user attempts to drill down on a related opportunity record to see more details of the record, the operation is successful if the opportunity record still exists, and only if the user is authorized to see the details of that opportunity record. If the user is not authorized to see the details of that opportunity record, then the user sees an error message.
- **Inherit Primary.** The Inherit Primary access level is available for certain one-to-many and many-to-many related record types only. With the Inherit Primary access level, the behavior of the related records is as follows:
  - Only the related child records that the user is authorized to see are shown in the list of related records.
  - Each related record inherits the access level from its own primary record type rather than the access level of the parent record type in the relationship.

For example, if the access level is set to Inherit Primary for the related Opportunity record type on the Account parent record type, then the behavior of the related opportunity records is as follows:

- Only those related opportunity records that the user is authorized to see are shown in the list of related records.
- Each opportunity record inherits the access level from the primary Opportunity record type and not from its parent Account record type. When a user attempts to drill down on a related opportunity record to see more details of the record, the operation is always successful if the opportunity record still exists because the user is authorized to see the details of all of the opportunity records in the list of related records.

For many-to-many relationships, selecting the Inherit Primary access level means that the user cannot add or remove a relationship between two existing records. However, the Inherit Primary access level is also available in combination with the Add access right, or in combination with the Add and Remove access rights.

**NOTE:** If the Inherit Primary access level (or any of its combinations) is found on any of the profiles used for a related record type, the Inherit Primary setting takes precedence. For example, if the Inherit Primary and View access levels are both found, the Inherit Primary access level overrides the View access level. If the Inherit Primary, Read-Only, and View access levels are all found, the Inherit Primary access right overrides the View and Read-Only access levels.

- **Add/Inherit Primary.** The Add/Inherit Primary access level is available for related records that share a many-to-many relationship with the parent. The Inherit Primary element of the Add/Inherit Primary access level works in the same way as the Inherit Primary access level. However, the Add/Inherit Primary access level also allows the user to associate an existing related record with the parent record. If a related record is successfully added, that record inherits the access level of its primary record. The Add/Inherit Primary access level does not allow users to remove an existing related record.
- **Add/Remove/Inherit Primary.** The Add/Remove/Inherit Primary access level is available for related records that share a many-to-many relationship with the parent. The Inherit Primary element of the Add/Remove/Inherit Primary access level works in the same way as the Inherit Primary access level. However, the Add/Remove/Inherit Primary access level also allows the user to associate an existing related record with the parent record, or to remove (dissociate) the link between the records. When a user removes or dissociates a related record, the record is not deleted and remains in the database. If a related record is successfully added, that record inherits the access level of its primary record.

The following table shows the relationships where the Inherit Primary access level is available. The relationships in this table are one-to-many relationships.



**NOTE:** If the access level is currently set to View for any of the relationships indicated in the following table, then it is recommended that you change the access level from View to Inherit Primary.

Parent Record Type	Related Record Type
Account	Business Plans
Account	Calls
Account	Completed Activities
Account	Custom Object 04 and higher
Account	Financial Account: Branch
Account	Financial Account: Held Away Institution
Account	Financial Accounts
Account	Objectives
Account	Open Activities
Account	Opportunities
Account	Plan Accounts
Accreditation	Accreditation Requests
Accreditation	All Custom Objects
Activity	Attendee Call
Activity	Custom Object 04 and higher
Activity	Message Responses
Application	Activities
Broker Profile	All Custom Objects
Business Plan	Accreditation Requests
Business Plan	Activities
Business Plan	Business Plans
Business Plan	Certification Requests
Business Plan	All Custom Objects
Business Plan	Objectives
Business Plan	Plan Accounts
Business Plan	Plan Contacts
Business Plan	Plan Opportunities

Parent Record Type	Related Record Type
Campaign	Completed Activities
Campaign	Custom Object 04 and higher
Campaign	Financial Accounts
Campaign	Open Activities
Certification	Certification Requests
Certification	All Custom Objects
Claim	Activities
Contact	Certification Requests
Contact	Course Enrollments
Contact	Custom Object 04 and higher
Contact	Exam Registrations
Contact	Financial Account: Account Holder
Contact	Financial Accounts
Contact	Objectives
Contact	Plan Contacts
Course	Course Enrollments
Course	All Custom Objects
Custom Object 01	Custom Object 04 and higher
Custom Object 01	Financial Accounts
Custom Object 02	Custom Object 04 and higher
Custom Object 02	Financial Accounts
Custom Object 03	Custom Object 04 and higher
Custom Object 03	Financial Accounts
Custom Objects 04 and higher	Activities
Custom Objects 04 and higher	All Custom Objects
Custom Objects 04 and higher	Financial Accounts
Custom Objects 04 and higher	Opportunities
Deal Registration	Activities
Deal Registration	All Custom Objects

Parent Record Type	Related Record Type
Dealer	Completed Activities
Dealer	Custom Object 04 and higher
Dealer	Open Activities
Dealer	Opportunities
Exam	All Custom Objects
Exam	Exam Registrations
Financial Account	Activities
Financial Account	All Custom Objects
Financial Account	Financial Accounts
Financial Account	Opportunities
Financial Plan	Activities
Financial Plan	Opportunities
Fund	Activities
Fund	Custom Object 04 and higher
Fund	Objectives
Fund Request	Completed Activities
Fund Request	Custom Object 04 and higher
Fund Request	Open Activities
Household	Custom Object 04 and higher
Household	Financial Accounts
Inventory Period	All Custom Objects
Lead	Completed Activities
Lead	Custom Object 04 and higher
Lead	Open Activities
MDF Request	Activities
MDF Request	All Custom Objects
MedEd Event	Business Plans
MedEd Event	Completed Activities
MedEd Event	Custom Object 04 and higher
MedEd Event	Objectives

Parent Record Type	Related Record Type
MedEd Event	Open Activities
Messaging Plan	Business Plans
Messaging Plan	Message Responses
Messaging Plan	Messaging Plan Items
Messaging Plan Item	Message Responses
Messaging Plan Item	Messaging Plan Item Relations
Objective	Accreditation Requests
Objective	Activities
Objective	Certification Requests
Objective	Course Enrollments
Objective	All Custom Objects
Objective	Exam Registrations
Objective	Objectives
Objective	Opportunities
Opportunity	Completed Activities
Opportunity	Custom Object 04 and higher
Opportunity	Open Activities
Opportunity	Plan Opportunities
Opportunity	Sub-Opportunities
Order	All Custom Objects
Order Item	All Custom Objects
Partner	Accreditation Requests
Partner	Business Plans
Partner	Completed Activities
Partner	Course Enrollments
Partner	Custom Object 04 and higher
Partner	Exam Registrations
Partner	Open Activities
Partner Program	Custom Object 04 and higher
Partner Program	Opportunities

Parent Record Type	Related Record Type
Period	Business Plans
Period	Objectives
Policy	Activities
Policy	All Custom Objects
Policy	Opportunities
Portfolio	Completed Activities
Portfolio	Custom Object 04 and higher
Portfolio	Financial Accounts
Portfolio	Open Activities
Sample Lot	All Custom Objects
Sample Transaction	All Custom Objects
Sample Transaction	Transaction Items
Service Request	Completed Activities
Service Request	Custom Object 04 and higher
Service Request	Open Activities
Solution	Custom Object 04 and higher
Solution	Messaging Plan Item Relations
Solution	Messaging Plan Items
Special Pricing Request	Activities
Special Pricing Request	All Custom Objects
Vehicle	Custom Object 04 and higher

The following table shows the relationships where the Inherit Primary access level and its combinations (Inherit Primary, Add/Inherit Primary, and Add/Remove/Inherit Primary) are available. The relationships in this table are many-to-many relationships.

**NOTE:** If you currently use the Read/Create access level for any of the many-to-many relationships indicated in the following table, then it is recommended that you change the Read/Create access level to one of the Inherit Primary combinations on the related record types.

Parent Record Type	Related Record Type
Campaign	Opportunities
Contact	Calls
Contact	Completed Activities

Parent Record Type	Related Record Type
Contact	Open Activities
Contact	Opportunities
Custom Object 01	Completed Activities
Custom Object 01	Open Activities
Custom Object 01	Opportunities
Custom Object 02	Completed Activities
Custom Object 02	Open Activities
Custom Object 02	Opportunities
Custom Object 03	Completed Activities
Custom Object 03	Open Activities
Custom Object 03	Opportunities

### Related Topics

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Examples of Access Level Calculations](#) (on page 190)
- [Process of Setting Up Access Profiles](#) (on page 200)

## Examples of Access Level Calculations

Click the following links to see some examples of how Oracle CRM On Demand calculates the access rights of users:

- [Example 1: Using the View Access Level](#) (on page 191)
- [Example 2: Using the Inherit Primary Access Level](#) (on page 195)
- [Example 3: Securing Data Through Books](#) (on page 198)

The access rights in the examples are based on certain configurations of user roles, access profiles, and other access-control components. Oracle CRM On Demand calculates the access rights for an authenticated user each time the user interacts with it. Oracle CRM On Demand determines the access rights from the user's role and all of the access profiles that are applicable through owner access profiles, default access profiles, the reporting hierarchy, membership of custom books, user delegation, and team membership, which are referred to as the *access-control components*.

**NOTE:** Users can be employees of your company or employees of a partner organization. Users can also be external systems that access Oracle CRM On Demand.

**Related Topics**

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [Process of Setting Up Access Profiles](#) (on page 200)

**Example 1: Using the View Access Level**

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, Amanda Jacobsen has the Sales Rep role. Amanda can create new accounts and see all other account records. She is allowed to create opportunities, but she can see only opportunities that she owns or that she is authorized to see.

The following table shows the record-type settings on the Sales Rep role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	Yes
Opportunity	Yes	Yes	No

The Sales Rep role gives Amanda full control over the accounts and opportunities that she creates and restricted rights on records that she does not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	View
Opportunity	Read/Edit/Delete	Not applicable	Not applicable

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	View
Opportunity	Read-Only	Not applicable	Not applicable

In this example of calculating access rights, it is assumed that the Enable Parent Team Inheritance check box is deselected on the company profile. For more information about the Enable Parent Team Inheritance check box, see [About Access Propagation Through Team Inheritance](#) (on page 172).

David Bloom also has a Sales Rep role in the same company. David has the same access rights as Amanda.

Amanda is the owner of Opportunity X, which is linked to Account 1. David creates an opportunity, Opportunity Y, and also links it to Account 1. Amanda is not on the opportunity team.

When Amanda views the list of the accounts in her company, she can see all accounts because her role allows her visibility to all accounts, including those she does not own. The following table shows the records that Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1		
Account Detail		
Account Name:	Account 1	
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name		Owner
Opportunity X		Amanda Jacobsen
Opportunity Y		David Bloom
Account Team		
Last Name	First Name	Account Access
Hope	Jonathan	Owner

### Related Record Visibility in Example 1

To determine which related opportunity records Amanda can see on the account in this example, Oracle CRM On Demand examines Amanda's access rights, as follows:

- 1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

**NOTE:** If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all account records.

In this example, the answer is yes. Amanda's role allows her to read all account records, therefore Amanda can see the account. Because Amanda is not the owner of the parent account, her default access profile is used. The access level for the opportunity related record type on Amanda's default access profile is View.

- Determines if the parent record is in a book where Amanda is a book member.

In this example, the answer is no.

- Determines if Amanda is a member of the account team.

In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the account team.

In this example, the answer is no.



If the answer to this question is yes (that is, one or more of Amanda's subordinates is a member of the account team), Oracle CRM On Demand extracts the access level for the opportunity related record type for each of those subordinates from the appropriate access profile. The access profile assigned in the Account Access field on the subordinate's team membership on the account is used in that case (not the access profile assigned in the Opportunity Access field).

- Determines if Amanda has access to the account record through delegation.

In this example, the answer is no.

### 2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on the user's role.

- Determines if Amanda's role grants her the privilege for the opportunity record type.

Opportunities are not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

In this example, the answer is no.

### 3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the most permissive access level found is View. The Inherit Primary access level is not present, therefore all child opportunity records, including those the user is not authorized to see, are shown.

## Actions on Related Records in Example 1

When a user attempts to perform an action on a related record, Oracle CRM On Demand must determine whether the user has the appropriate access rights for that action. In this example, Amanda can attempt to read the record details, or to edit the record, or to delete the record. Two cases are considered:

- In Case 1, Amanda attempts to perform an action on Opportunity X.
- In Case 2, Amanda attempts to perform an action on Opportunity Y.

**Case 1:** Amanda attempts to perform an action on Opportunity X, which she owns.

Oracle CRM On Demand examines Amanda's access rights, as follows:

### 1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

**NOTE:** If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all opportunity records.

In this example, the answer is no. Although Amanda can see the parent account record because her default access profile is used, her default access profile is not used for the opportunity record.

- Determines if the opportunity record is in a book where Amanda is a book member.

In this example, the answer is no.

- Determines if Amanda is a member of the opportunity team.

In this example, the answer is yes. Amanda is the owner of the opportunity, and is therefore in the opportunity team. The access level of the primary opportunity record type from Amanda's default access profile (the Sales Rep Default Access Profile) is Read/Edit/Delete.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the opportunity team.

In this example, the answer is no.

- Determines if Amanda has access to the account record through delegation.

In this example, the answer is no.

### 2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

- Determines if Amanda's role grants her the privilege for the Opportunity record type.

The Opportunity record type is not controlled through privileges. Therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

In this example, the answer is no.

### 3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the most permissive access level found is Read/Edit/Delete.

**Case 2:** Amanda attempts to perform an action on Opportunity Y, which is owned by David Bloom.

Oracle CRM On Demand examines Amanda's access rights, as follows:

#### 1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

**NOTE:** If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all opportunity records.

In this example, the answer is no. Although Amanda can see the parent account record because her default access profile is used, her default access profile is not used for the opportunity record.

- Determines if the opportunity record is in a book where Amanda is a book member.  
In this example, the answer is no.
- Determines if Amanda is a member of the opportunity team.  
In this example, the answer is no.
- Determines if any of Amanda's subordinates (direct or indirect) is a member of the opportunity team.  
In this example, the answer is no.
- Determines if Amanda has access to the account record through delegation.  
In this example, the answer is no.

**2** Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.  
In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.
- Determines if Amanda's role grants her the privilege for the Opportunity record type.  
The Opportunity record type is not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.
- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.  
In this example, the answer is no.

**3** Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the final access level is No Access.

### Related Topics

See the following topics for additional examples:

- [Example 2: Using the Inherit Primary Access Level](#) (on page 195)
- [Example 3: Securing Data Through Books](#) (on page 198)

## Example 2: Using the Inherit Primary Access Level

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, Amanda Jacobsen is a Sales Rep in her company. Amanda can create new accounts and see all other account records. She is allowed to create opportunities, but she can see only opportunities that she owns or that she is authorized to see.

The following table shows the record-type settings on the Sales Rep Role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	Yes

Primary Record Type	Has Access	Can Create	Can Read All Records
Opportunity	Yes	Yes	No

The Sales Rep role gives Amanda full control over the accounts and opportunities she creates, and restricted rights on records that she does not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	Inherit Primary
Opportunity	Read/Edit/Delete	Not applicable	Not applicable

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	Inherit Primary
Opportunity	Read-Only	Not applicable	Not applicable

In this example of calculating access rights, it is assumed that the Enable Parent Team Inheritance check box is deselected on the company profile. For more information about the Enable Parent Team Inheritance check box, see [About Access Propagation Through Team Inheritance](#) (on page 172).

David Bloom is also a Sales Rep in the same company. David has the same access rights as Amanda.

Amanda is the owner of Opportunity X, which is linked to Account 1. David creates an opportunity, Opportunity Y, and also links it to Account 1. Amanda is not on the opportunity team.

When Amanda views the list of the accounts in her company, she can see all accounts because her role allows her visibility to all accounts, including those she does not own. The following table shows the records that Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1		
Account Detail		
Account Name:	Account 1	
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name		Owner
Opportunity X		Amanda Jacobsen
Account Team		
Last Name	First Name	Account Access

**Account Detail: Account 1**

Hope	Jonathan	Owner
Bloom	David	Member

**Related Record Visibility in Example 2**

To determine which related opportunity records Amanda can see on the account in this example, Oracle CRM On Demand examines Amanda's access rights, as follows:

- 1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all account records.

In this example, the answer is yes. Amanda's role allows her to read all account records, therefore Amanda can see the account. Because Amanda is not the owner of the parent account, her default access profile is used. The access level for the opportunity related record type on Amanda's default access profile is Inherit Primary.

- Determines if the parent record is in a book where Amanda is a book member.

In this example, the answer is no.

- Determines if Amanda is a member of the account team.

In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the account team.

In this example, the answer is no.

If the answer to the question is yes (that is, one or more of Amanda's subordinates is a member of the account team), Oracle CRM On Demand extracts the access level for the opportunity related record type for each of those subordinates from the appropriate access profile. The access profile assigned in the Account Access field on the subordinate's team membership on the account is used in that case (not the access profile assigned in the Opportunity Access field).

- Determines if Amanda has access to the account record through delegation.

In this example, the answer is no.

- 2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

- Determines if Amanda's role grants her the privilege for the opportunity record type.

Opportunities are not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

In this example, the answer is yes, therefore Oracle CRM On Demand displays the following opportunity records on the account:

- All linked opportunity records where Amanda is the owner.
- All linked opportunity records that Amanda is authorized to see through all other access-control components.

Amanda's role denies her the ability to see opportunities that she does not own, and so she cannot see the opportunity that David Bloom created.

### Actions on Related Records in Example 2

When Amanda attempts to perform an action on Opportunity X in this example, the calculation is the same, and the outcome of the access rights is the same as that in Case 1 in [Example 1: Using the View Access Level](#) (on page 191). The final access level is Read/Edit/Delete.

### Related Topics

See the following topics for additional examples:

- [Example 1: Using the View Access Level](#) (on page 191)
- [Example 3: Securing Data Through Books](#) (on page 198)

## Example 3: Securing Data Through Books

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, a company uses custom books to organize its data by territory. Two books are used in this example: South West and East.

The South West book has three members:

- Amanda Jacobsen
- David Bloom
- Carlos Guzman

All users in the South West book have the Read-Only access profile on their book role.

The East book has three members:

- Rick Rogers
- Raj Kumar
- Jonathan Hope

All users in the East book have the Read-Only access profile on their book membership record.

When any of the users creates an account or opportunity record, an automated (workflow) process assigns the appropriate book to the record. It assigns the book based on the territory attribute of the record.

All of the users have the Sales Rep role. They can create new accounts and opportunities. They can see all account and opportunity records in their territory, but not in other territories.

The following table shows the record-type settings on the Sales Rep role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	No
Opportunity	Yes	Yes	No

All of the users have full control over the accounts and opportunities that they create, but they have restricted rights on records that they do not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	Inherit Primary
		Books	Read-Only
Opportunity	Read/Edit/Delete	Books	Read-Only

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	Inherit Primary
		Books	Read-Only
Opportunity	Read-Only	Books	Read-Only

**NOTE:** For all primary record types that support books, the relationship with the Books related record type is a one-to-child relationship.

In this example, it is assumed that the Enable Parent Team Inheritance check box is deselected on the company profile. For more information about the Enable Parent Team Inheritance check box, see [About Access Propagation Through Team Inheritance](#) (on page 172).

When Amanda Jacobsen views the list of the accounts in her company, she can see the accounts in the South West book and the accounts she owns. She cannot see any other accounts.

The following table shows the records Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1	
Account Detail	
Account Name:	Account 1
Owner:	Jonathan Hope

Account Detail: Account 1		
Opportunities		
Opportunity Name		Owner
Opportunity X		Amanda Jacobsen
Opportunity Y		David Bloom
Account Team		
Last Name	First Name	Account Access
Hope	Jonathan	Owner

Amanda can see two opportunities because those opportunities are in the South West book, where she is a member. All other members of the South West book can see those opportunities.

Jonathan Hope is a member of the East book. When Jonathan signs in to Oracle CRM On Demand, he can also see Account 1, because he owns the account. However, he cannot see any opportunities that are related to Account 1, but which he does not own. The Inherit Primary access level on the Opportunities related record type on accounts provides this security.

Rick Rogers and Raj Kumar, who are members of the East book, cannot see the Account 1, Opportunity X, or Opportunity Y records. They cannot see the account because it is not in the East book, and their role prevents them from seeing account records that they do not own. Similarly, they cannot see Opportunity X or Opportunity Y because these opportunities are not in the East book, and their role prevents them from seeing opportunities they do not own.

Amanda cannot modify the Opportunity Y, which is owned by David Bloom. This is because of the following:

- Amanda does not own the account, therefore her owner access profile is not used.
- Amanda's role prevents her from accessing opportunity records that she does not own, therefore her default access profile is not used.
- The only access profile that is active at this point is the Read-Only access profile that Amanda has through her membership of the South West book.

Therefore, Amanda's access level to Opportunity Y is Read-Only.

### Related Topics

See the following topics for additional examples:

- [Example 1: Using the View Access Level](#) (on page 191)
- [Example 2: Using the Inherit Primary Access Level](#) (on page 195)

## Process of Setting Up Access Profiles

This topic describes how to set up access profiles.



**NOTE:** Oracle CRM On Demand generates audit records of all changes to access profiles. If your user role includes the Access Master Audit Trail and Admin Configuration Audit privilege, then you can view the audit trail of the changes to access profiles. For more information about viewing the audit trail, see [Reviewing Audit Trail Configuration Changes](#) (on page 46).

**Before you begin.** To view, create, or revise access profiles at your company, your role must include the Manage Users and Access privilege.

To set up an access profile, perform the following tasks:

- 1 [Adding Access Profiles](#) (on page 201).
- 2 [Specifying Access Levels for Primary Record Types](#) (on page 203).
- 3 [Specifying Access Levels for Related Record Types](#) (on page 203).

For links to topics that provide additional information about access profiles, see [Related Topics for Access Profiles](#) (on page 204).

## Adding Access Profiles

You can add an access profile by doing the following:

- Creating a new profile
- Copying an existing profile and editing its access levels

The following procedure describes how to add an access profile.

### *To add an access profile*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the Access Profile Management section, click the Access Profiles link.
- 4 In the Access Profile List, do one of the following:
  - To create a new profile based on an existing profile, click Copy on the profile that you want to copy.
  - To create a new profile that is not based on an existing profile, click New in the title bar.

The Access Profile Wizard opens to guide you through the process.

- 5 In Step 1 of the Access Profile Wizard, provide a name and description, and set the remaining fields as needed. The remaining fields are described in the following table.

Field	Description
Mark for Translation	<p>The Mark for Translation check box is effective only in both of the following circumstances:</p> <ul style="list-style-type: none"> <li>■ When the name of an existing access profile is being changed</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>■ The existing access profile name has already been translated into one or more additional languages</li> </ul> <p>In these circumstances, you can use the Mark for Translation check box to indicate whether the translated access profile name is to be replaced by the new name or it is to remain unchanged. Depending on the setting of the Mark for Translation check box, the access profile name is displayed as follows:</p> <ul style="list-style-type: none"> <li>■ If you select the Mark for Translation check box, then the new name is displayed in the language in which it was entered, regardless of the language used for viewing the list of access profiles. When the list of access profiles is viewed in the language in which the new name was entered, the name is displayed in the default font. However, when the list of access profiles is viewed in any other language, the name is displayed in blue font within brackets.</li> <li>■ If you do not select the Mark for Translation check box, then the new name appears when the list of access profiles is viewed in the language in which the new name was entered. However, when the list of access profiles is viewed in any other language, the original translated access profile name still appears.</li> </ul> <p>The Mark for Translation check box does not have any effect when a new access profile is added. When a new access profile is added, the new name automatically appears in the list of access profiles in all languages. When the list of access profiles is viewed in the language in which the new name was entered, the name of the new access profile is displayed in the default font. When the list of access profiles is viewed in any other language, the name of the new access profile is displayed in blue font within brackets.</p>
Grantable to Team Members	To make the access profile available to assign to team members, select this check box.
Grantable to Book Users	To make the access profile available to assign to book users, select this check box. For more information, see <a href="#">Creating Access Profiles for Books</a> (on page 247).
Disabled	If you select this check box, then the access profile is disabled. A disabled access profile cannot be used in any new associations with roles, teams, or books. However, the disabled access profile continues to function as the access profile where it has been associated previously with a role, team, or book until you assign a different access profile to the role, team, or book.

**NOTE:** By default, the Grantable to Team Members and Grantable to Book Users check boxes are selected on the predefined Edit, Full and ReadOnly access profiles. Therefore, when a user adds another user to a team or a book, the picklist of access profiles that appears in the Add Users or Edit Users dialog box includes these predefined access profiles. If you want to prevent users from assigning any of these three access profiles to a user in a book or a user book in a team, deselect the appropriate check box for that access profile.

## Specifying Access Levels for Primary Record Types

To specify access levels for primary record types, complete the steps in the following procedure.

### *To specify access levels for primary record types*

- 1 In Step 2 of the Access Profile Wizard, select the access level for each of the primary record types. Choose from:

- Read-Only
- Read/Edit
- Read/Edit/Delete

For more information about the access levels for primary record types, see [About Access Levels for Primary Record Types](#) (on page 180).

- 2 If you want to specify access levels for the related record types for a primary record type, click the Related Information link for the primary record type. Otherwise, click Finish to save your changes.

Most record types have a Related Information link. Related information appears as linked records on the record Detail pages. For more information about specifying access levels for related record types, see [Specifying Access Levels for Related Record Types](#) (on page 203).

## Specifying Access Levels for Related Record Types

To specify the access levels for related record types, complete the steps in the following procedure.

### *To specify access levels for related record types*

- 1 In step 2 of the Access Profile Wizard, click the Related Information link for the primary record type for which you want to specify the access level for one or more related record types.
- 2 Select the appropriate access level for each related information record type.

The picklist of the access level options that appears in the access level field for each related record type depends on the relationship of the related record type to its parent record type. Depending on the access level that you set in this field and in the Role Management Wizard, you can grant or revoke users' rights to create, update, or view records of that record type.

For more information about the access levels for related record types, see [About Access Levels for Related Record Types](#) (on page 181).

**NOTE:** To create a new opportunity, the access level for the Revenue related record type on the Opportunity record type must be set to Full.

For information about the access profile settings that are required for converting leads, see Access Profile and Role Settings for Converting Leads. For information about the access profile settings that are required for converting deal registrations, see Access Profile and Role Settings for Converting Deal Registrations.

- 3 When you finish setting the access levels on the related record types for a primary record type, click Previous to return to the main page of step 2 of the wizard.

- 4 Repeat steps 1 through 3 of this procedure for each primary record type for which you want to specify the access levels for one or more related record types.
- 5 When you finish setting the access levels for all of the primary record types and their related record types, click Finish to save your settings.

### Related Topics for Access Profiles

See the following topics for related information:

- [Access Profile Management](#) (on page 168)
- [About Access Profiles in Roles](#) (on page 170)
- [About Access Profiles in Teams, Groups, and Books](#) (on page 171)
- [About Access Propagation Through Team Inheritance](#) (on page 172)
- [How Access Rights for Displaying Primary Record-Type Records are Determined](#) (on page 174)
- [How Access Rights for Working with Primary Record-Type Records are Determined](#) (on page 174)
- [How Access Rights for Displaying Related Record-Type Records are Determined](#) (on page 176)
- [How Access Rights for Working with Related Record-Type Records are Determined](#) (on page 178)
- [Working with the Access Profile List Page](#) (on page 179)
- [Examples of Access Level Calculations](#) (on page 190)

## Role Management

In Oracle CRM On Demand, you manage roles in the Role List page and in the Role Management Wizard. You access the Role List page and the Role Management Wizard from the global Admin link, which is available on every page in Oracle CRM On Demand.

A *role* in Oracle CRM On Demand is similar to a business function that a user performs within an organization, such as a sales executive function or a service manager function. Within your organization, your business function gives you certain privileges and permissions that are unique to your business function. Similarly, within the context of Oracle CRM On Demand, roles differentiate one business function from another, by defining the features in Oracle CRM On Demand that a user has the privileges to use, the set of permissions the user is given to work with protected information, and the user interface settings that display information.

**NOTE:** Users can be employees or employees of a partner organization. Users can also be external systems that access Oracle CRM On Demand.

The parameters defined by a role include:

- Privileges
- Access to record types
- Access profiles for the role
- User interface settings, which include the following:
  - Tab settings

- Page layouts
- Search layouts
- Homepage layouts

Each user has one assigned role. The same role can be assigned to multiple users. Roles do not have a hierarchy.

### Related Topics

See the following topics for related information:

- [Guidelines for Setting Up Roles](#) (on page 205)
- [Working with the Role List Page](#) (on page 206)
- [About Record Type Access in Roles](#) (on page 207)
- [About Access Profiles in Roles](#) (on page 170)
- [About Privileges in Roles](#) (on page 209)
- [Adding Roles](#) (on page 210)

## Guidelines for Setting Up Roles

Oracle CRM On Demand provides a set of prebuilt roles that you can use as your starting point for setting up roles for your company. The User and Role Setup Template contains information about the prebuilt roles, listing their record access, privileges, and default tab access. For information about finding the User and Role Setup templates, see [Using Administrator Templates During Setup](#) (on page 14).

As an example of the type of role that you can set up in Oracle CRM On Demand, your company might require two distinct sales forces: the Install Base Account Management sales force and the New Business sales force. Field sales representatives in the Install Base Account Management sales force track account information about their customer deployments. Field sales representatives in the New Business sales force track account information that profiles the purchasing requirements of their prospect account. Although these two job duties are similar, the type of information most relevant to support their daily processes is different. In this example, you can set up two roles:

- The Install Base Field Sales Reps role
- The New Business Field Sales Reps role

You can base each of these roles on the prebuilt Field Sales Rep role, and tailor the new roles by adding different page layouts to support the unique business requirements of the two sales forces.

You can continue to change and add role definitions as required, for example, as a result of organizational change, or the acquisition of another company. If the organizational structure of your company changes, the business functions of one or more employees can also change. If your company acquires another company, you might have to assimilate additional employees as users in Oracle CRM On Demand.

When setting up roles, follow these guidelines:

- Determine how each employee or group of employees will use Oracle CRM On Demand.

Examine the job functions of your employees to determine the following:

- What tasks they must complete and which records they require access to
- What kind of access they require to each type of record
- If there are records or tabs that they must not be able to access

The following table shows some examples of access types.

Access Type	Example
Feature access	The Inside Sales Rep role provides access to the Convert button on the Lead Detail page.
Record access	The Executive role provides edit access to all opportunity records regardless of the owner.
Tab access	By default, users who have the Sales and Marketing Manager role can access the Accounts and Opportunities tabs, but cannot access the Service Requests and Solutions tabs.

- Review the characteristics of each of the prebuilt roles to determine if these roles meet the needs of your employees.

The names of the prebuilt roles do not necessarily match your company's job titles. You must match job functions and tasks to the roles, not job titles.

- Set up your roles as follows:
  - If a prebuilt role is close to what you want for an employee group, create a new role by copying the prebuilt role, giving the copy a new name, and then editing the copy to meet your requirements.
  - If no prebuilt role is close to what you require, create a new role to match your requirements.

**TIP:** Use the [User and Role Setup Template](#) to help you document the role requirements of your employee groups. Then, refer to the completed template when you create or edit roles and set up users in Oracle CRM On Demand.

### Related Topics

See the following topics for related information:

- [Role Management](#) (on page 204)
- [Working with the Role List Page](#) (on page 206)
- [About Record Type Access in Roles](#) (on page 207)
- [About Access Profiles in Roles](#) (on page 170)
- [About Privileges in Roles](#) (on page 209)
- [Adding Roles](#) (on page 210)

## Working with the Role List Page

On the Role List page, you can perform the actions in the following table.

To do this	Follow these steps
------------	--------------------

To do this	Follow these steps
Add a new role	<p>In the title bar of the Role List page, click New Role. The Role Management Wizard opens.</p> <p>For more information about using the Role Management Wizard, see <a href="#">Adding Roles</a> (on page 210).</p>
Add a new role by copying an existing role	<p>In the record-level menu beside the role name, select Copy. The Role Management Wizard opens.</p> <p>For more information about using the Role Management Wizard, see <a href="#">Adding Roles</a> (on page 210).</p>
Delete a role	<p>In the record-level menu beside the role name, select Delete, then confirm that you want to delete the role.</p> <p><b>NOTE:</b> You cannot delete the Administrator role.</p> <p>When you delete a role, all users who have that role assigned to them continue to have the role until you assign a different role to them. However, after you delete a role, you cannot assign that role to any user.</p>
Select a language for viewing the list of roles	<p>In the title bar of the Role List page, in the Translation Language field, select the language in which you want to view the list of roles. You can view the list in any of the languages that are supported for your company in Oracle CRM On Demand.</p> <p><b>NOTE:</b> If an existing role does not have a translated role name, the name of the role is not translated and appears in brackets.</p>

You can use Alpha Search to filter the list of roles. For more information about Alpha Search, see [Filtering Lists](#).

### Related Topics

See the following topics for related information:

- [Role Management](#) (on page 204)
- [Guidelines for Setting Up Roles](#) (on page 205)
- [About Record Type Access in Roles](#) (on page 207)
- [About Access Profiles in Roles](#) (on page 170)
- [About Privileges in Roles](#) (on page 209)
- [Adding Roles](#) (on page 210)

## About Record Type Access in Roles

You control access to primary record types for a role in step 2 of the Role Management Wizard. For more information about adding roles, see [Adding Roles](#) (on page 210).

A primary record type is a record type that can be used as an independent record type. Most, but not all, of the primary record types can appear as tabs in Oracle CRM On Demand. However, there are some primary record types that cannot appear as tabs. For example, the Book record type is a primary record type (that is, book records can be created as independent records). However, the Book record type cannot appear as a tab. Record types that are not primary record types cannot appear as tabs.

With some exceptions, the primary record types that meet the following criteria are listed in step 2 of the Role Management Wizard:

- Your company is licensed to use the record type.
- Your role has the appropriate privilege to access the record type.

The exceptions are record types that are used for administrative purposes only, such as the company profile, user records, workflow rules, and so on. Access to such record types is controlled through privileges only.

For each primary record type that is listed in step 2 of the wizard, access to the record type for the role is controlled through three settings:

- **Has Access.** When the Has Access check box in step 2 of the Role Management Wizard is selected for a primary record type on a role, users who have the role can access records of that record type. If the Has Access check box is deselected for a record type on a role, users who have the role are denied all forms of access to the record type. For example, if the Has Access check box is deselected for the Account record type on a role, all forms of access to the Account record type, including related applets, search capabilities, and other access to the Account record type, are denied to users who have the role. Then the following can occur:
  - If a user who does not have access to the Account record type attempts to associate an opportunity with an account record, the operation fails.
  - If a user who does not have access to the Account record type sees an opportunity that is already linked to an account, the user is not able to view any details of the linked account record.

**NOTE:** Denying access to a record type (by not selecting the Has Access check box for the record type in the Role Management Wizard) can prevent a user from being able to create a record of another record type. For example, if you deny access to a record type that a user must access to create a record based on another record type, you can prevent a user who has the role from being able to create that record.

- **Can Create.** When the Can Create check box in step 2 of the Role Management Wizard is selected for a record type on a role, users who have the role can create records of that record type.

If the Can Create check box for a primary record type is deselected, users who have the role do not have the ability to create a record of that primary record type.

**NOTE:** The permission to create records of a primary record type is controlled by this setting. It is not controlled through access profiles. Access profiles control access to existing data, so primary records must exist before access profiles can control access to those records.

- **Can Read All Records.** When the Can Read All Records check box in step 2 of the Role Management Wizard is selected for a primary record type on a role, users who have the role can see all records of that record type. If the Can Read All Records check box is deselected for a primary record type, as a general rule, users who have the role can see records of that record type only if they are authorized to see the record. Other access-control components can influence the visibility to records, such as books, teams, groups, and the management hierarchy. Users can gain visibility to records that they do not own through those access-control components. However, if no other access-control component authorizes visibility to the records, and the Can Read All Records check box is deselected, then the user sees only the records that the user owns.



### Related Topics

See the following topics for related information:

- [Role Management](#) (on page 204)
- [Guidelines for Setting Up Roles](#) (on page 205)
- [Working with the Role List Page](#) (on page 206)
- [About Access Profiles in Roles](#) (on page 170)
- [About Privileges in Roles](#) (on page 209)
- [Adding Roles](#) (on page 210)

## About Privileges in Roles

You grant or revoke privileges for a role in step 4 of the Role Management Wizard. For more information about adding roles, see [Adding Roles](#) (on page 210).

Privileges control the features that your company is licensed to use in Oracle CRM On Demand. When your company is first set up to use Oracle CRM On Demand, the Administrator role is given all the privileges for all the licensed features. Every time a user interacts with Oracle CRM On Demand, Oracle CRM On Demand reviews the set of privileges assigned to that user's role to determine whether the user has the necessary privileges to perform certain functions and to access certain record types. If a privilege that was previously granted to a role is later revoked, any user who has the role loses the ability to use the feature. When a privilege is revoked, any existing data and configuration information that were put in place by a user who had the privilege are not lost.

In the Role Management Wizard, privileges are organized in categories. Each category represents the group of privileges that comprises a piece of functionality in Oracle CRM On Demand. For example, *Admin: Users and Access Controls* is a category of privilege that controls all functional areas of User Management and Access Control.

Each privilege relates to an individual functional area within a category of privileges. For example, Manage Books is a privilege that is required if a user who has the role wants to create, update, edit, and delete custom books and subbooks, and manage associated members. Each privilege also exposes control fields and other capabilities unique to the feature. To determine which privileges are required to allow users to use a feature, see the online help.

**NOTE:** Granting a privilege to a role is not enough to grant all access rights to allow a user to use the functionality. When you grant a privilege, the necessary record types and functional details required for the feature are exposed in the role. For example, when the Manage Books privilege is assigned to a role, a user who has the role sees the Books record type in step 2 of the Role Management Wizard, and also in the Access Profile Wizard. However, to give the user the necessary rights to work with book records, you must also configure the necessary levels of access in step 2 (Record Type Access) of the Role Management Wizard for the user's role and in the access profiles for the role.

### Related Topics

See the following topics for related information:

- [Role Management](#) (on page 204)
- [Guidelines for Setting Up Roles](#) (on page 205)

- [Working with the Role List Page](#) (on page 206)
- [About Record Type Access in Roles](#) (on page 207)
- [About Access Profiles in Roles](#) (on page 170)
- [Adding Roles](#) (on page 210)

## Adding Roles

You can add a role to Oracle CRM On Demand by doing the following:

- Creating a new role
- Copying an existing role, renaming the copy, and then editing the privileges and access rights of the copy

Copying roles is useful if you want to have similar roles, but you want users to see different page layouts. For example, your North American and EMEA executives might want to view opportunity information in different ways, requiring different fields and page layouts for each set of users. To set up this configuration, create two roles that are based on the default Executive role, and name your new roles, *Exec - North America* and *Exec - EMEA*. When you copy the Executive role, the access privileges of the original role are retained for the new role, and you must change only the page layouts so that users to whom you give the new role are presented with the views and fields relevant to their work.

**NOTE:** You must create the page layouts that you want to associate with the role. For information about creating page layouts, see [Record Type Application Customization Page](#) (on page 63).

**TIP:** Consider setting up a test user for each role. Then, activate the test user, and make sure the configurations are set up correctly. Do not activate other users until you have completed all user setup activities, including access rights, role settings, reporting and data-sharing hierarchies, workflow rules, and any other business process customization. Deactivate test users when the testing is complete.

**Before you begin.** Do the following:

- Make sure your role has the Manage Users and Access privilege.
- Read the guidelines for setting up for roles, see [Guidelines for Setting Up Roles](#) (on page 205).

**NOTE:** Oracle CRM On Demand generates audit records of all changes to roles. If your user role includes the Access Master Audit Trail and Admin Configuration Audit privilege, then you can view the audit trail of the changes to roles. For more information about viewing the audit trail, see [Reviewing Audit Trail Configuration Changes](#) (on page 46).

The following procedure describes how to add a role.

### **To add a role**

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click User Management and Access Controls.
- 3 In the Role Management section, click Role Management.
- 4 In the Role List page, in the Translation Language field, choose your company's primary language.

**5** Do one of the following:

- To create a new role by copying an existing role, click Copy on the role that you want to copy.
- To create a new role that is not based on an existing role, click New Role in the title bar of the page.

The Role Management wizard appears, to lead you through the process. Each step in the Role Management Wizard controls certain settings for the role. All the role settings together determine the access rights for users who have the role.

**6** In Step 1, Role Information, provide a name and description, and complete the remaining fields as needed. The remaining fields are described in the following table.

Field	Description
Mark for Translation	<p>The Mark for Translation check box is effective only in both of the following circumstances:</p> <ul style="list-style-type: none"> <li>■ When the name of an existing role is being changed</li> <li>■ The existing role name has already been translated into one or more additional languages</li> </ul> <p>In these circumstances, you can use the Mark for Translation check box to indicate whether the translated role name is to be replaced by the new name, or is to remain unchanged. Depending on the setting of the Mark for Translation check box, the role name is displayed as follows:</p> <ul style="list-style-type: none"> <li>■ If you select the Mark for Translation check box, then the new name is displayed in the language in which it was entered, regardless of the language used for viewing the list of roles. When the list of roles is viewed in the language in which the new name was entered, the name is displayed in black font. However, when the list of roles is viewed in any other language, the name is displayed in blue font within brackets.</li> <li>■ If you do not select the Mark for Translation check box, the new name appears when the list of roles is viewed in the language in which the new name was entered. However, when the list of roles is viewed in any other language, the original translated role name still appears.</li> </ul> <p>The Mark for Translation check box does not have any effect when a new role is added. When a new role is added, the new name automatically appears in the list of roles in all languages. When the list of roles is viewed in the language in which the new name was entered, the name of the new role is displayed in black font. When the list of roles is viewed in any other language, the name of the new role is displayed in blue font within brackets.</p>
Default Sales Process	<p>(Optional) To set the default sales process for new opportunities created by users who are assigned this role, choose an option in the Default Sales Process field.</p> <p>For more information about this option, see <a href="#">Setting Up Sales Processes, Categories, and Coaches</a> (on page 343).</p>

Field	Description
Theme Name	(Optional) To set the default theme for the role, choose a theme in the Theme Name field.  For more information on creating themes, see <a href="#">Creating New Themes</a> (on page 126).
Action Bar Layout	By default, the standard layout is used for the Action bar for all roles. You can assign a different Action bar layout for the role.
Related Information Format	(Optional) To set a default format for related information sections on record Detail pages, choose either Lists or Tabs.  This setting determines if the related information sections on record Detail pages are shown as lists or as tabs. This setting can also be set on each user's record, and users whose role has the Personalize Related Information Display Format privilege can set the Related Information Format option in their personal profile. If the Related Information Format option in a user's record is blank, then the default setting for the user's role is used; and if the Related Information Format option on the user's role is blank, then the default setting for the company is used.
Lead Conversion Layout	(Optional) To set a lead conversion layout (for the Convert Lead page) for the users assigned this role, choose a layout in the Lead Conversion Layout field.  If you do not choose a layout for the role, the default layout for the company is used for the role. For information about creating lead conversion layouts, see <a href="#">Creating Lead Conversion Layouts</a> (on page 333).

- 1 In Step 2, Record Type Access, for each record type, select the check box for each access level that you want to grant to the role.

You can select one or more of the following access levels for each record type:

- Has Access
- Can Create
- Can Read All Records

For more information about these access levels, see [About Record Type Access in Roles](#) (on page 207).

**CAUTION:** Denying access to a record type (by not selecting the Has Access check box for the record type in the Role Management Wizard) can prevent a user from being able to create a record of another record type. For example, if you deny access to a record type that a user must access to create a record based on another record type, you can prevent a user who has the role from being able to create that record.

**NOTE:** To convert leads or deal registrations, users must have the appropriate access level settings for certain record types. For more information about the access levels that are required for converting leads, see [Access Profile and Role Settings for Converting Leads](#). For information about the access levels that are required for converting deal registrations, see [Access Profile and Role Settings for Converting Deal Registrations](#).

**TIP:** When you make changes to the access levels for a role, after you save your changes, users assigned the role must sign out and sign in again for the changes in their role to take effect.

- 2 In Step 3, Access Profiles, choose the access profiles to assign to this role:

For more information about access profiles in roles, see [About Access Profiles in Roles](#) (on page 170).

- 3 In Step 4, Privileges, select the Assign check box for each privilege that you want to grant to the role, or deselect the Assign check box for any privilege you want to revoke from the role.

Privileges are organized alphabetically by category.

**CAUTION:** In some cases, if the Assign check box for a privilege is deselected on the Administrator role, then the privilege is removed from Oracle CRM On Demand, and the company administrator cannot grant that privilege to any other role. If this problem occurs, contact Oracle CRM On Demand Customer Care to restore the privilege.

For more information about privileges in roles, see [About Privileges in Roles](#) (on page 209).

- 4 In Step 5, Tab Access and Order, move the tabs to the appropriate section of the page, then click the up and down arrows in the Selected Tabs section to define the order in which the tabs that the user sees by default are displayed.

The Not Available Tabs section lists the record-type tabs and custom Web tabs that you can make available to the role. The list of record types that appear in this section is determined by Oracle CRM On Demand. Most of the record types that are listed in step 2 of the Role Management Wizard also appear in this list. Other record types, such as Books, do not appear in this list because they cannot be displayed as tabs. The tabs shown in the Not Available Tabs section are not available to users who have the role.

To make tabs available or visible to users who have this role, do the following:

- Move tabs that you want users to see by default to the Selected Tabs section. This section lists the record-type tabs and custom Web tabs that are visible by default to any user who has the role, the first time the user signs in with the role. Use the up and down arrows to determine the order in which the tabs are initially displayed. Each user who has the role can customize his or her settings, so that tabs are no longer displayed by default or are displayed in a different order. For more information about how users can manage their personal settings, see [Personalizing Your Application](#).
- Move tabs that you do not want users to see by default, but which the users can make visible for themselves, to the Available Tabs section. This section lists the record-type tabs and custom Web tabs that are available to the role, but that are not displayed by default. That is, the tabs listed in this section are not displayed to the users until the users make the tabs visible for themselves in their personal layout (available from the My Setup link). Each user who has the role can personalize his or her settings so that the available tabs are displayed by default. Each user can also specify the order in which all of the tabs are displayed.
- Leave tabs that you want hidden from users in the Not Available Tabs section.

**NOTE:** Moving a tab from the Not Available Tabs section to the Available Tabs or Selected Tabs section makes the tab available to the user only if the Has Access check box is selected for the record type in step 2 (Record Type Access) of the Role Management Wizard.

**TIP:** You can move a range of tabs at the same time by selecting the top one, holding down the Shift key, and clicking the last one in the range. Then click the right or left arrow.

- 5 In Step 6, Page Layout Assignment, for each record type, choose if the Page View Type is static or dynamic, then select from the list of page layouts available for that view type.

Page layouts determine the fields and sections users see on the Create, Edit, and Detail pages for the various record types. Oracle CRM On Demand comes with a standard page layout for each record type. The standard page layouts, which cannot be deleted, are static page layouts. So, the Static option is always available in the Page View Type field. The Dynamic option is available only if there are dynamic page layouts available for the record type. Company administrators can create additional, customized, static page layouts or dynamic page layouts for record types.

For each record type, the standard page layout and any page layouts that are created for the record type are available for assignment to the role. For more information about creating static and dynamic page layouts, see [Record Type Application Customization Page](#) (on page 63).

The default page layout for a record type is the standard, static page layout for that record type.

**NOTE:** The list of record types that appears in step 6 of the Role Management Wizard is determined by Oracle CRM On Demand. You might see record types such as User Admin and User Owner, which do not appear as tabs in Oracle CRM On Demand

- 6 In Step 7, Search Layout Assignment, for each record type, select from the list of available search layouts.

For each listed record type, the list of available layouts is shown in the Search Layout Name field. Search layouts determine the fields (standard fields and custom fields) that users can use when searching for records, and the fields that users see in search results pages. You can assign a search layout for most of the primary record types that are available to the role as tabs. You can also assign search layouts to other record types that are also searchable, such as Product and User. For more information on creating and modifying customized search layouts, see [Managing Search Layouts](#) (on page 96).

- 7 In Step 8, Homepage Layout Assignment, for each record type, select from the list of available homepage layouts.

For each listed record type, the standard Homepage layout and any Homepage layouts that you create for the record type are available for you to assign to the role. The list of record types includes all of the primary record types that are available as tabs for the role.

Homepage layouts determine what information users see on the Homepage for each record type. Oracle CRM On Demand comes with a default Homepage layout for each primary record type that can appear as a tab. You can create additional, customized Homepage layouts for record types. For more information about creating Homepage layouts, see [Creating Record Homepage Layouts](#) (on page 102).

- 8 Click Finish.

### Related Topics

See the following topics for related information:

- [Role Management](#) (on page 204)
- [Guidelines for Setting Up Roles](#) (on page 205)
- [Working with the Role List Page](#) (on page 206)
- [About Record Type Access in Roles](#) (on page 207)
- [About Access Profiles in Roles](#) (on page 170)

■ [About Privileges in Roles](#) (on page 209)

## Book Management

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

Using books to organize your company data makes searches for records faster and more efficient. Books can coexist with groups and teams. If your requirements for providing access to groups of users are straightforward and relatively simple, you can use group assignment. However, if the requirements of group-record ownership are more complex, you are recommended to use books.

### Default User Books

In Oracle CRM On Demand, a default book is assigned to each user, and bears the user's name. When a record is assigned to a user, the record is assigned to the user's default book. Where a record is owned by a team, the team represents the set of default books of the users who are members of the team. User books are automatically associated with records when the record owner is changed, and when team membership is changed.

### Custom Books

When the book functionality is enabled, you can create custom books to organize your data to suit your business purposes. Typically, custom books are referred to as *books*. Books can be independent of each other, or you can organize your books into hierarchies. For example, you can create books to segment your data according to the organizational units of your business, such as territories or products. You can then set up users to have the appropriate level of access to the books.

### Books Created Automatically for Partners

When a partner record is made active in Oracle CRM On Demand, a book that can contain data is automatically created for the partner organization. The books that are automatically created for partners are available for selection in the Book lookup window that is accessed from the Partner record pages when in the Books related item on a partner record. The Partner record pages are accessible to users in the brand owner company only. If the Access to Partner check box or the Reciprocal Access to Partner (Reverse) check box is selected when a partner relationship is added to a partner record, the books that were automatically created for the related partners are synchronized. Then, wherever partner accounts are associated in Oracle CRM On Demand, the partner users who are associated with each of the synchronized partner books can see the partner accounts to which their partner organization is related.

When a user is added to a partner organization, the user is also automatically associated with the partner book for the partner organization.

### Custom Books for Partners

You can also create custom books for partner organizations. You can assign any combination of users, including users from the brand owner company, and users in partner organizations, to such custom books, as required.

## Record Types Supported for Books

In the same way that records of different types can be assigned to the same user, records of different types can be assigned to the same book. The following record types can be assigned to books:

- Account
- Accreditation
- Allocation
- Application
- Appointment
- Business Plan
- Campaign
- Certification
- Contact
- Course
- Custom Objects
- Deal Registration
- Dealer
- Exam
- Financial Account
- Financial Plan
- Fund
- Household
- Inventory Audit Report
- Inventory Period
- Lead
- MDF Requests
- MedEd Event
- Messaging Plan
- Objective
- Opportunity
- Partner
- Policy
- Portfolio
- Program
- Sample Lot



- Sample Transaction
- Service Request
- Smart Call
- Solution
- Special Pricing Request
- Task
- Vehicle

## Books in the Book Selector

If the Book selector is enabled for the company, the Book selector field appears in targeted searches and advanced searches, in the title bar of list pages, and in the Reports Homepage. The Book selector is used to limit a targeted search to a custom book or a user book that can contain the record that the user wants to find. The plus sign (+), which appears in the Book selector field, indicates the presence of sublevels.

**NOTE:** Partner books appear in the Book selector for the Partner record type only.

Clicking the icon next to the Book selector displays the book hierarchy, which is organized as follows:

- **All.** The default root node for all books, including custom books and user books
  - **Books.** The default root node for all custom books set up for your company
  - **Users.** The default root node for all user books

All, Books, and Users are nodes or anchors. They are not real books. As an example of a book hierarchy, assume that a company sets up a geographic book hierarchy for America. Assume that a user, John Williams, who has subordinates, is also associated with the books in the geographic hierarchy. For this user, the following hierarchy is shown in the Book selector, under the All option:

- **Books**
  - **America** (The parent book)
    - **North** (Subbook. A subbook can also be a parent book for a further level of subbooks.)
    - **East** (Subbook)
    - **West** (Subbook)
    - **South** (Subbook)
- **Users**
  - **John Williams** (User who has subordinates)
    - **Lucy Harris** (Subordinate. A subordinate can also have subordinates.)
    - **Rick Rogers** (Subordinate)
    - **Donna Jones** (Subordinate)
    - **Jeff Smith** (Subordinate)

**NOTE:** Books at the lowest level of a hierarchy are called leaf-node books.

The Include Sub-Items check box in the Book selector allows the user to specify that data in subitems (subordinates or subbooks) is to be included in the search. The Include Sub-Items check box is permanently selected in the Book selector for reports.

### Selecting Books for Searches

When searching for records, users select the book that contains the data they want to find. If users cannot be sure which book at a certain level of a book hierarchy contains the data they are looking for, the users select the next book higher up in the hierarchy for the search.

If the user selects the Include Sub-Items option in the Book selector, and the Manager Visibility Enabled check box is selected in the company profile, the data in the subbooks or subordinates is included in the search.

As an example, consider the following book hierarchy:

- America
  - North
    - North Area 1
    - North Area 2

If a user is unsure whether a record is in North Area 1 or North Area 2, the user selects the North book for the search, rather than selecting the America book.

### Related Topics

For information about designing your book structures, setting up books, and enabling users to use books, see the following topics:

- [About Designing Book Structures](#) (on page 219)
- [About Web Services Support for Books](#) (on page 222)
- [About Record Ownership Modes](#) (on page 223)
- [Record Ownership Modes and Automatically Generated Tasks](#) (on page 227)
- [About Importing Books and Book Assignments](#) (on page 231)
- [About Time-Based Book Assignments](#) (on page 232)
- [Scenario for Using Books to Manage Sales Territories](#) (on page 235)
- [Example of Using Books to Manage Sales Territories](#) (on page 235)
- [Process of Setting Up Books](#) (on page 237)
- [Verifying Book Setup for the Administrator Role](#) (on page 238)
- [Creating Book Types and Book User Roles](#) (on page 241)
- [Configuring Record Ownership Modes](#) (on page 242)
- [Creating Books and Book Hierarchies](#) (on page 243)
- [Associating Users with Books](#) (on page 244)
- [Creating Access Profiles for Books](#) (on page 247)

- [Enabling Books for Your Company](#) (on page 248)
- [Enabling Books for Users and User Roles](#) (on page 249)
- [Adding Books to Record Detail Page Layouts](#) (on page 251)
- [Assigning Records to Books](#) (on page 253)
- [Book Hierarchy Page](#) (on page 255)
- [Book Fields](#) (on page 255)
- [Information about Troubleshooting Books](#) (on page 257)

## About Designing Book Structures

To set up an efficient book structure, you must plan your book hierarchies carefully. Consider the following guidelines when you design and refine the book hierarchies for your company:

- Do not create custom books that replicate user books.
- Determine the organization and access policies for your business data.
- Determine whether the corporate structure is relevant to data management.
- Determine the data affiliations in your company.
- Design your books based on user needs, and consider the tasks where users most commonly use books.
- Design your books so that the functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.
- Keep the number of levels in your book hierarchies to a minimum.
- As far as possible, reduce the amount of cross-listing in the book structure. *Cross-listing* is the practice of duplicating records across multiple books.
- Use workflow rules to automate book management.

## User Books

The disadvantage of creating custom books that replicate user books is that the data in the custom books and in the default user books must be synchronized. This additional task increases server-processing time, and affects the speed at which records are retrieved.

**NOTE:** One reason why a company might consider replicating user books is to give a user temporary access to another user's data. A better way of meeting this need is to add the user who wants to access the data as a delegate for the user who owns the data.

## Data Access Needs

Your book structure does not have to reflect your company's corporate hierarchy. Instead, it is recommended that your book structure should closely reflect how your company organizes its data. Parts of your business can be organized by geography, while other parts can be organized by product line or industry. Pay special attention to cases where:

- Two (or more) departments must not be able access data belonging to the other department

- Two (or more) departments must be able to access data belonging to the other department

### Relevance of Corporate Structure

In many companies, a parent organization has complete access to all data in the child organizations. Members of such a parent organization typically have global access to data across all child organizations.

If your organization is structured in this way, it is recommended that you do not to set up books that reflect organizational structure at the parent organization level. However, consider the following:

- Setting up books that reflect the organizational structure at other levels (such as child organization level)
- Setting up other book hierarchies at parent organization level. For example, at parent organization level, you can create a book or book hierarchy that allows users at parent organization level to view opportunities that have significant revenue potential, across all child organizations.

### Data Affiliations

Examine the procedures that your company follows when a user transfers from one department to another. For example:

- If the data that the user manages always moves to the new department with the user so that there is continued affiliation of data, it is best to manage your data through record ownership and teams. Typically, appointments and tasks move with the user at all levels. In some sales environments, all customer data moves with the user. This data affiliation is true for small and medium businesses and for businesses that focus on low volume, high-value sales.
- If the data usually stays in a fixed organization, such as a geographical organization, so that there is organizational ownership of data, it is best to manage the data through books that reflect the organizational structure.
- If both continued affiliation and organizational ownership continue to exist for some time after the user moves to another department, the two hierarchies can coexist.

### User Needs and Tasks

When designing your book structure, consider the task where users most commonly use books, including working through lists, searching for records, and creating and using reports.

#### Working Through Lists

To help you to identify the lists that users need, determine the types of lists that are most frequently used, and the ideal lists for your users. Ask the users in your company for input to help you to do this. If no book in your book structure contains all the necessary records for an ideal list, the book structure is probably missing a hierarchy. For example, you can set up both a geographic hierarchy and a product-oriented hierarchy.

If users spend a lot of time working in a specific subset of one book, create a subbook for the subset. Name the subbook in a way that allows users to recognize it. The subbook can also be set as the default for the Book selector, so that users do not have to select the appropriate book every time. For more information about setting the default for the Book selector, see [Enabling Books for Users and User Roles](#) (on page 249).

### Searching for Records

To determine the search needs of the users in your company, ask the users about scenarios where they look up particular records. Your book structure and book sizes should reflect the searches and search criteria that users perform most frequently.

**NOTE:** If you already have a book structure in place, and are further refining it, ask users if they can typically identify that a particular record is part of a particular book in the hierarchy. If the users consistently say that they can be certain only about a book at a higher level, ask them if another subdivision of the book structure would allow them to narrow their search further. Users should be forced to search higher-level books only as an exception to their normal searches.

The fields that are used in a search also affect the speed of the search:

- Using indexed fields to search for records in books results in optimal performance. (Indexed fields are shown in green text in the search sections.)
- When nonindexed fields (rather than indexed fields) are used to search for records in books, searches are slower, and performance is affected by the volume of records that are searched. (Search fields that are not indexed are shown in black text in the search sections.)

For example, if you determine that users typically search contact records based on indexed fields, the number of records for the lowest-level book (called the leaf-node book) might be up to 100,000 for each record type. However, if users typically search contact records based on nonindexed fields, you can restrict the size of your leaf-node books to between 20,000 and 30,000 records for each record type.

Data configuration varies from company to company. As a result, there is no recommended number of records for books. You must manage book size continuously. Books facilitate faster searches by reducing the number of records that are searched.

### Creating and Using Reports

All users except administrators are subject to data-visibility rules for reports. When a user book or custom book is specified in the Book selector for reporting, the data considered for the reports is as follows:

- All content in historical analyses (including historical analyses accessed from the Reports and Dashboards tabs, and reports embedded in record Homepages) is restricted to the book and includes all sublevels of the selected book. Records that the user owns, or where the user is a member of a team, are not included unless those records are also in the selected book or one of its subbooks.
- Real-time reporting is restricted to data directly associated with the book (custom book or user book) selected in the Book selector. If the selected book has subbooks or subordinates, the data in the subbooks or subordinates is ignored in real-time reports.

**NOTE:** Although you do not typically need to change your book structure after you set it up, you can do so. No downtime is required to make such changes, and the changes are applied immediately. However, the changes are not immediately reflected in the data in real-time reports.

For more information about visibility to records in reports, see Reports.

### Manager Visibility

When you are designing your book hierarchies, base your designs on the following principles:

- The functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.

The Manager Visibility Enabled option allows managers to access the records of the users who report to them, and allows users to include data in subbooks in their searches.

- The Include Sub-Items option is seldom or never used in searches of large data volumes. (The number of records that constitutes a large data volume differs from company to company and according to search patterns.)

There are cases where it is necessary to use the Include Sub-Items option. For example, managers need to run lists on user books that include their subordinates, because their subordinates cannot share data with each other. If the volumes are large, then the search time increases. However, for optimal performance, select the Include Sub-Items option only when necessary.

### Hierarchy Levels

Book hierarchies that have large numbers of levels, with records at every level, behave in a similar way to the team functionality where manager visibility is enabled. Such hierarchies perform well with small data sets. However, as data volumes grow, books with fewer levels in the hierarchy (or with no hierarchy levels) perform far better than team functionality.

If one level of your book hierarchy provides no additional value to data security or data organization, merge the redundant book and its subbooks. Ask book users if they can typically identify whether a record is in one subbook or another subbook of the same parent book; if they cannot, it indicates that the best option is to collapse the two subbooks into the parent book.

A simple method of reducing the number of levels in a book hierarchy is to prefix subbooks with the name of the parent book. For example, if you have a subbook called North with a parent book called North America, remove the parent book, and rename the subbook as NA – North.

### Cross-Listing

Cross-listing is the practice of duplicating records across multiple books. Cross-listing has an administrative overhead for users, because synchronization is required, resulting in many read-write operations that affect the server's performance. Keep cross-listing to a minimum.

### Automated Book Management

Typically, book assignment criteria are mapped to one or more fields in a record type. You can create workflow rules to automatically reorganize the book assignment when one of those fields changes.

For example, if you have a book hierarchy called *Territory*, you can create a workflow rule to monitor a field in a record type (for example, the Territory field on accounts), and then create an Assign a Book action on the rule to update the Territory book on the record with a new book when the Territory field value on the account changes.

### About Web Services Support for Books

Books can be managed through Web services. When books are enabled for your company, the Book Web services description language (WSDL) is available for download. For more information about Web services, see *Oracle Web Services On Demand Guide*.

## About Record Ownership Modes

Depending on your company's business needs, you might not want to assign owners to records of a certain record type. Instead, you might want to organize your records in such a way that you do not need to reassign ownership of records when employees move to other responsibilities, or when sales teams are realigned because business models change. Starting with Release 20, Oracle CRM On Demand allows you to support such business needs by associating a primary custom book with a record instead of assigning an owner to the record. Any user who is a member of the primary custom book on a record can access and work with that record, as long as the user's role and access profile settings give the user the necessary access rights. Your company might also want to set up some record types so that records of that type are not required to have either an assigned owner or an associated primary custom book.

Oracle CRM On Demand allows you to set up the following modes of record ownership for most of the record types that use books:

- **User mode.** User mode is similar to record ownership in Release 19 and earlier releases of Oracle CRM On Demand. When a record type is configured in user mode, each record of that record type must have an owner assigned to it. If the Book field is available on the detail page of the record, then the Book field displays the user book associated with the owner.

**NOTE:** Service request records can exist without an owner by default, and some record types such as Users and Products do not have owners on the records. This functionality is unchanged from earlier releases of Oracle CRM On Demand.

- **Book mode.** When a record type is configured in book mode, the records of that record type cannot have an owner assigned to them. Instead, a primary custom book is required for each record. Any user who is a member of the primary book on a record has access to and can work with the record, as long as the user's role and access profile settings give the user the necessary access rights. You can use book mode only with record types that support books.
- **Mixed mode.** Mixed mode is also referred to as *user or book mode*. When a record type is configured in this mode, a record of that record type can be set up in any one of the following ways:
  - The record can exist without either an assigned owner or an associated primary custom book. Users can access such a record through team membership or membership of a book associated with the record. Users whose user role has the Can Read All Records check box selected in Step 2 of the Role Management wizard can also access the record.
  - The record can have an owner assigned to it.
  - The record can have a primary custom book associated with it.

**NOTE:** The record cannot have both an assigned owner and a primary custom book.

You can use mixed mode only with record types that support books.

Regardless of the ownership mode that you configure for a record type, users can assign additional books to a record, and users can link additional users to a record if the record type supports teams. A user who is a member of any book that is assigned to a record can access the record and can work with the record, as long as the user's role and access profile settings give the user the necessary access rights.

## Reporting

For the Account and Contact record types, you can create real-time and historical reports based on the relationship between the records and the primary book on the records. For more information about reporting and record ownership modes, see About Visibility to Records in Analytics.

Record ownership modes do not impact the data-visibility rules that apply when you select a book in the Book selector on the Reports homepage. For more information about the data-visibility rules for books in reporting, see [About Designing Book Structures](#) (on page 219).

## Record Types That Support Record Ownership Modes

Record ownership modes are supported for record types that support custom books, with the following exceptions:

- Allocation
- Fund
- Inventory Audit Report
- Inventory Period
- Messaging Plan
- Smart Call
- Solution

You can configure all of the other record types that support custom books in user mode, book mode, or mixed mode. You can use a mixture of ownership modes for the various record types that support books. For example, you can configure the Contact record type in book mode, and configure the Account record type in user mode. You can change the record ownership mode for a record type at any time. You configure the record ownership mode for a record type by configuring the Owner and Book fields on the record type as required or not required, as shown in the following table.

**NOTE:** The page layouts for the record type must be set up correctly for the record ownership mode. For more information, see [About Field Setup and Page Layouts for Record Ownership Modes](#) (on page 71).

Record Ownership Mode	Owner Field Set to Required	Book Field Set to Required	Other Configuration Details	Comments
User Mode	Yes	No	None	If the Book field is present on a record layout, then the field is read-only and shows the name of the user book for the user who is the assigned owner of the record.
Book Mode	No	Yes	(Optional) Set the Owner field to Read-Only.	<p>If the Owner field is present on a record layout, then the field must be blank.</p> <p>The Book field is a picklist field that contains a list of the custom books you set up for your company.</p>



Record Ownership Mode	Owner Field Set to Required	Book Field Set to Required	Other Configuration Details	Comments
Mixed Mode	No	No	None	<p>If a custom book is selected in the Book field on a record, then the Owner field is blank.</p> <p>If a user is selected in the Owner field, then the Book field is automatically set to the name of the user book for the owner.</p>

## Default Record Ownership Mode

For existing companies that were created in Release 19 or earlier releases of Oracle CRM On Demand, user mode is the default record ownership mode except for the Service Request record type, which is configured in mixed mode by default. For new companies, mixed mode is the default record ownership mode for the record types that support record ownership modes.

## Considerations for Record Ownership Modes

When configuring the record ownership mode for a record type, consider the following:

- **Assignment manager.** The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. If there is a primary custom book assigned to the record before the assignment manager reassigns the record to an owner, then the assignment manager removes the primary book from the record. The assignment manager cannot reassign records if the record type is configured in book mode. If you configure a record type in book mode, then it is strongly recommended that you make all rule groups for that record type inactive. For more information about assignment rules, see [About Assignment Rules](#) (on page 321).
- **Working with other applications.** The following applications require records to have an owner. You cannot use these applications if the record type that the application works with is configured in book mode, and if the record type is configured in mixed mode, then the records must have owners:
  - Oracle Offline On Demand
  - Oracle Outlook Email Integration On Demand
  - Oracle Notes Email Integration On Demand
  - Oracle CRM On Demand Integration for Office
  - Oracle CRM On Demand Connected Mobile Sales
- **Updating records after changing ownership mode.** If you change the record ownership mode for a record type to user mode, consider updating all of the records of that type to have an owner. Otherwise, the user who next updates a record of that record type will be forced to select an owner for the record. Similarly, if you change the record ownership mode for a record type to book mode, consider updating all of the records of that type to have an appropriate primary custom book assigned to them. Otherwise, the user who next updates a record of that record type will be forced to select a primary custom book for the record.

## What Happens When You Change the Record Ownership Mode for a Record Type?

If your company changes the record ownership mode for a record type from one mode to another mode, then the new ownership mode is enforced for any new records of that record type. For existing records, the behavior is as follows:

- **When the new record ownership mode is user mode.** The following happens when a record is updated for the first time after the ownership mode changes:
  - If the record does not already have a user assigned as the owner, then the user who updates the record is required to select a user in the Owner field.
  - If the record previously had a primary custom book associated with it, then the name of the primary book is cleared from the Book field, and the name of the user book for the new owner is shown in the Book field. The book is also removed from the record and no longer appears in the Books section of the record Detail page.
- **When the new record ownership mode is book mode.** The following happens when a record is updated for the first time after the ownership mode is changed:
  - If the record does not already have a primary book associated with it, then the user who updates the record is required to select a primary custom book in the Book field.
  - If the record previously had an assigned owner, then the following happens:
    - The Owner field is cleared on the record.
    - If the record type supports teams, then all of the members of the team, except the former owner of the record, remain as members of the team. The behavior is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the team. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.
- **When the new record ownership mode is mixed mode.** The following happens when a record is updated for the first time after the ownership mode is changed. This behavior also applies each time the record is updated while the record type is in mixed mode:
  - The user who updates the record is not required to select an owner or primary book.
  - The user who updates the record can select an owner or a primary custom book for the record but not both.
  - If a user assigns an owner to a record, and a primary custom book was previously associated with the record, then the Book field is cleared on the record. The book is also removed from the record and no longer appears in the Books section of the record Detail page.
  - If a user associates a custom book as a primary book on the record, and the record previously had an assigned owner, then the following happens:
    - The Owner field is cleared on the record.
    - If the record type supports teams, then all of the members of the team, except the former owner of the record, remain as members of the team. The behavior is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then

all of the members of the group are removed from the record. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

### What Happens If Records Are Updated Through The Mass Update Functionality?

The Mass Update functionality, which is supported for certain record types only, allow users to update fields in group of records from list pages. When a user uses the Mass Update functionality to update a group of records, the user is not forced to provide values for any required fields that are null on the records. Therefore, if a user updates a group of records after the record ownership mode for the record type is changed, then the user is not forced to select an owner or a primary custom book on the records that the user updates, even if the new record ownership mode requires the records to have an owner or a primary custom book.

## Record Ownership Modes and Automatically Generated Tasks

Record ownership modes affect the ownership of the tasks that are generated automatically by Oracle CRM On Demand, such as the tasks that are generated by the Create Task actions in workflow rules and the tasks that are generated by the sales stages in sales processes.

### Considerations for Generated Tasks

When generating tasks, Oracle CRM On Demand considers the following:

- The option selected in the Owner field of the workflow action or sales stage task
- The values in the Owner and Book field of the source record if any values are present in those fields

**NOTE:** The source record for a sales stage task is the opportunity from which the sales process is accessed, or in some cases, the account that is linked to the opportunity. The source record for a workflow action is the record that triggers the workflow rule.

- The record ownership mode of the Activity record type

## How Oracle CRM On Demand Assigns Owners and Primary Custom Books to Generated Tasks

Oracle CRM On Demand can assign either an owner or a primary custom book to an automatically generated task, but not both. Oracle CRM On Demand can assign one of the following as the owner for an automatically generated task:

- One of the following users:
  - The owner of a source record
  - The manager of the owner of a source record
  - A user who has a team role or a team user role

**NOTE:** *Team roles* are the roles that describe the parts that users perform within a team on a record. *Team user roles* are the Oracle CRM On Demand roles that are assigned to all users in Oracle CRM On Demand, including the users who are members of teams on records. Each member of a team on a source record can have a team role as well as a team user role.

- For tasks generated by a workflow action, the owner specified in the workflow action

Oracle CRM On Demand can assign one of the following as the primary custom book for an automatically generated task:

- The primary custom book associated with a source record
- The default custom book for one of the following:
  - The owner of a source record
  - The manager of the owner of a source record
  - A user who has a team role or a team user role

The user's *default book* for the task is determined as follows:

- If a default custom book that can contain data is associated with the Activity record type in the user's record, then that book is the default book.

**NOTE:** The default books for record types are specified in the Default Book by Record Type section of the User Detail page.

- If the default book for the Activity record type in the user's record is not specified, and a default custom book that can contain data is specified in the Default Book field on the user's record, then the book specified in the Default Book field on the user's record is the default book.

**NOTE:** The default book must be a custom book. Oracle CRM On Demand cannot assign a user book as the primary book for a task. In addition, the default custom book must be a book that can contain data.

If an appropriate owner or primary custom book that can contain data cannot be identified, then Oracle CRM On Demand does not generate the task. The following table shows how Oracle CRM On Demand determines which owner or primary custom book to assign to a generated task.

Owner Option in Workflow Action or Sales Stage Task	Source Record: Owner or Primary Custom Book	Activity Record Type: User Mode	Activity Record Type: Book Mode	Activity Record Type: Mixed Mode
Source record owner	Owner	The owner of the source record is the owner of the task.	<p>If the owner of the source record has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task.</p> <p>If the owner of the source record does not have a default book, then the task is not created. No error message is returned.</p>	The owner of the source record is the owner of the task.
Source record owner	Primary custom book	The task is not created. No error	The primary custom book from the source record is assigned as	The primary custom book from the source record is assigned as

Owner Option in Workflow Action or Sales Stage Task	Source Record: Owner or Primary Custom Book	Activity Record Type: User Mode	Activity Record Type: Book Mode	Activity Record Type: Mixed Mode
		message is returned.	the primary book for the task.	the primary book for the task.
Source record owner	No owner and no primary custom book	The task is not created. No error message is returned.	The task is not created. No error message is returned.	The task is not created. No error message is returned.
Manager of source record owner	Owner	<p>If the owner of the source record has a manager, then the manager is the owner of the task.</p> <p>If the owner of the source record has no manager, then the behavior is as follows:</p> <ul style="list-style-type: none"> <li>■ For sales processes, the owner of the source record is the owner of the task.</li> <li>■ For workflow actions, the task is not created and no error message is returned.</li> </ul>	For information about the behavior in this case, see the second table in this topic.	<p>If the owner of the source record has a manager, then the manager is the owner of the task.</p> <p>If the owner of the source record has no manager, then the behavior is as follows:</p> <ul style="list-style-type: none"> <li>■ For sales processes, the owner of the source record is the owner of the task.</li> <li>■ For workflow actions, the task is not created and no error message is returned.</li> </ul>
Manager of source record owner	Primary custom book	The task is not created. No error message is returned.	The task is not created. No error message is returned.	The task is not created. No error message is returned.
Manager of source record owner	No owner and no primary custom book	The task is not created. No error message is returned.	The task is not created. No error message is returned.	The task is not created. No error message is returned.

Owner Option in Workflow Action or Sales Stage Task	Source Record: Owner or Primary Custom Book	Activity Record Type: User Mode	Activity Record Type: Book Mode	Activity Record Type: Mixed Mode
Team role or team user role	One or more team members have the role	The team member is the owner of the task. A task is generated for each team member who has the specified role.	<p>If the team member has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task.</p> <p>If the team member does not have a default book, then the task is not created. No error message is returned.</p>	The team member is the owner of the task. A task is generated for each team member who has the specified role.
Team role or team user role	No team member has the role	<p>For workflow actions, the task is not created and no error message is returned.</p> <p>For sales processes, if the source opportunity has an owner, then the opportunity owner is the owner of the task. If the source opportunity does not have an owner, then the task is not created and no error message is returned.</p>	<p>For workflow actions, the task is not created and no error message is returned.</p> <p>For sales processes, if the owner of the source opportunity has a default book, then the default book is assigned to the task. If the owner of the source opportunity does not have a default book, then the task is not created and no error message is returned.</p>	<p>For workflow actions, the task is not created and no error message is returned.</p> <p>For sales processes, if the source opportunity has an owner, then the opportunity owner is the owner of the task. If the source opportunity does not have an owner, then the task is not created and no error message is returned.</p>
Specific user	Not applicable	The specified user is the owner of the task.	<p>If the specified user has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task.</p> <p>If the specified user does not have a default book, then the task is not created. No error message is returned.</p>	The specified user is the owner of the task.

The following table shows how Oracle CRM On Demand determines which owner or primary custom book to assign to a generated task in the following circumstances:

- The option in the Owner field on the sales stage task or workflow action is set to the manager of the source record owner
- The source record has an owner
- The Activity record type is configured in book mode

Owner Has a Manager	Manager Has a Default Custom Book That Can Contain Data	Owner Has a Default Custom Book That Can Contain Data	Sales Process Behavior	Workflow Behavior
Yes	Yes	Not applicable	Oracle CRM On Demand assigns the manager's default book as the primary book for the task.	Oracle CRM On Demand assigns the manager's default book as the primary book for the task.
Yes	No	Yes	Oracle CRM On Demand assigns the default book of the source record owner as the primary book for the task.	The task is not created. No error message is returned.
No	Not applicable	Yes	Oracle CRM On Demand assigns the default book of the source record owner as the primary book for the task.	The task is not created. No error message is returned.
No	Not applicable	No	The task is not created. No error message is returned.	The task is not created. No error message is returned.

## About Importing Books and Book Assignments

You can import the following book-related records to Oracle CRM On Demand:

- **Books.** For information about importing book records, see [Book Fields: Import Preparation](#) (on page 416).
- **Book users.** You can import book user records to associate users with custom books. For information about importing book user records, see [Book User Fields: Import Preparation](#) (on page 415).
- **Account books.** You can import account book records to assign books to accounts. For information about importing account book records, see [Account Book Fields: Import Preparation](#) (on page 395).
- **Contact books.** You can import contact book records to assign books to contacts. For information about importing contact book records, see [Contact Book Fields: Import Preparation](#) (on page 427).

When you import records to assign books to accounts and contacts, you can specify a start date and an end date for each book assignment. You can also use the Future Primary Flag field to specify if the book that you assign to an account or contact is to become the primary book for that account or contact when the

assignment becomes active. For more information about time-based book assignments, see [About Time-Based Book Assignments](#) (on page 232).

### Related Topics

See the following topics for related information:

- [Scenario for Using Books to Manage Sales Territories](#) (on page 235)
- [Example of Using Books to Manage Sales Territories](#) (on page 235)

## About Time-Based Book Assignments

You can manage book assignments for accounts and contacts by importing account book records and contact book records. You can specify a start date and an end date for each book assignment that you import. If you do not specify a start date for a book assignment, then the assignment becomes active immediately. You can also use the Future Primary Flag field to specify if the book that you assign to an account or contact is to become the primary book for that account or contact when the book assignment becomes active.

## Daily Updates to Account and Contact Book Assignments

Every day, a scheduled procedure examines all book assignments for accounts and contacts and updates the assignments as necessary. By default, the procedure runs at the start of each day, immediately after midnight Oracle Server time. The procedure might be scheduled differently for certain customers. To determine the schedule for the procedure for your company, contact Oracle CRM On Demand Customer Care.

The book-assignment procedure updates the book assignments for accounts and contacts as follows:

- **Activates book assignments.** If the start date of a book assignment has arrived and the assignment is not already active, then the assignment becomes active. When a book assignment becomes active, users who are members of that book have access to the account or contact through membership of that book.

For example, you might import an account book record that assigns Book A to Account 1 with a start date of January 01 next year. When the book-assignment procedure runs at the start of the day on January 01 next year, the book assignment for Book A on Account 1 becomes active.

- **Determines if a book is the primary book.** If the Future Primary Flag field is set to Y for a book assignment and the assignment is being activated, then the book becomes the primary book for the account or contact.

For example, assume that Book A is currently the primary book for Account 1. You might import an account book record that assigns Book B to Account 1 with a start date of January 01 next year and with the Future Primary Flag field set to Y. When the book-assignment procedure runs at the start of the day on January 01 next year, the book assignment for Book B for Account 1 becomes active and Book B becomes the primary book for Account 1. Book A is no longer the primary book for Account 1. However, the book assignment for Book A for Account 1 remains active unless the end date for the assignment is in the past when the book-assignment procedure runs.

- **Resolves conflicts if more than one book is specified as the primary book.** If multiple book assignments for an account or contact have the same start date and also have the Future Primary Flag field set to Y, then the following happens when the start date for the assignments arrives:
  - All of the book assignments become active.



- The first book assignment that becomes active becomes the primary book for the record.
- If there is an existing primary book for the record, then that book is no longer the primary book for the record, but the book assignment remains active unless the end date for the book assignment is in the past.

For example, assume that Book A is currently the primary book for Account 1. You might import two account book records for Account 1. One of the records assigns Book B to Account 1 and the other assigns Book C to Account 1. Both assignments have the same start date of January 01 next year, and both assignments have the Future Primary Flag field set to Y. When the book-assignment procedure runs at the start of the day on January 01 next year, the assignments for Book B and Book C for Account 1 become active, and the assignment that is processed first becomes the primary book for Account 1. Book A is no longer the primary book for Account 1. However, the book assignment for Book A for Account 1 remains active unless the end date for the assignment is in the past when the book-assignment procedure runs.

- **Deactivates book assignments and removes primary books as necessary.** If the end date of a book assignment record is in the past, then the assignment becomes inactive and the book is removed from the record. In addition, if the book was the primary book for the account or contact, then the book is no longer the primary book for the account or contact.

For example, assume that Book A is currently the primary book for Account 1. The end date of the book assignment is December 31 this year. When the book-assignment script runs at the start of the day on January 01 next year, the book assignment becomes inactive and Book A is removed from the position of primary book for Account 1.

When a book assignment becomes inactive, the relationship between the book and the account or contact is ended, and the book is removed from the account or contact. Users no longer have access to the account or contact through membership of that book. However, users who have access to the account or contact through another book or through other access-control components, such as team membership, can still access the record.

You cannot change the book-assignment procedure.

## Example of a Time-Based Book Assignment

As an example of a time-based book assignment, consider the following: Book A is not currently assigned to Account 1. On December 01 of this year, you import an account book record that assigns Book A to Account 1. The book assignment has a start date of Jan 01 next year and an end date of Mar 31 of the same year. The book-assignment procedure activates and deactivates the book assignment as follows:

- Prior to January 01 next year, the assignment of Book A to Account 1 is inactive and Book A does not appear in the Books related information section of the detail page for Account 1.
- At the start of the day on January 01 next year, the book-assignment procedure activates the book assignment. When this happens, Book A appears in the Books related information section of the detail page for Account 1.
- On March 31, the book assignment is still active and Book A still appears in the Books related information section of the detail page for Account 1.
- At the start of the day on April 01, the book-assignment procedure deactivates the book assignment. When this happens, Book A no longer appears in the Books related information section of the detail page for Account 1.

## Restrictions When Specifying Start and End Dates for Book Assignments

When you specify the start and end dates for book assignments, note the following restrictions:

- If you specify both a start date and an end date, then the start date must be earlier than the end date.
- If you do not specify a start date, then the assignment becomes active at the time that it is added to Oracle CRM On Demand.
- If you do not specify an end date, then the book assignment remains active unless the book is removed from the record.
- If you specify an end date and do not specify a start date, then the book assignment becomes active immediately, and it remains active until the end date is reached or the book assignment is removed from the record, whichever comes first.

For example, you might import an account book record that assigns Book A to Account 1 and that has no start date and no end date. In this case, the book assignment becomes active immediately and is never made inactive by the book-assignment procedure because the book assignment does not have an end date. However, you can remove Book A from Account 1 through the user interface.

**NOTE:** An account can have multiple books assigned to it at the same time, with the same or different start dates and end dates for each book assignment. Similarly, a contact can have multiple books assigned to it at the same time, with the same or different start dates and end dates for each book assignment.

You can see the start and end dates in the book assignment details in the user interface in Oracle CRM On Demand, but you cannot change these dates in the user interface.

## About Updating Existing Book Assignments

If you import a record to assign a book to an account or contact, and the book is already assigned to the account or contact, then the existing book assignment record in Oracle CRM On Demand is updated with the values from the imported record. You can also overwrite an existing value in the Start Date or End Date fields by importing a blank value. For example, assume that Book A is already assigned to Account 1. The assignment has a start date in the past and an end date in the future. You can import an account book record for Book A and Account 1 that has the same start date as the existing assignment but has no end date. In this case, the existing assignment is updated and the end date is removed.

### Criteria for Updating Active Book Assignments

If an existing book assignment is already active, then the active periods for the existing assignment and the record that you import must overlap or be contiguous. The start and end dates of a record that you import to update an active book assignment must meet the following criteria:

- If the existing assignment has no end date, then the start date on the record that you import must not be a future date.
- The start date on the record that you import must not be more than 7 days later than the end date of the existing assignment.

If these criteria are not met, then the existing, active book assignment is not updated.

### Criteria for Updating Future Book Assignments

If you import a record to assign a book to an account or contact, and there is already a book assignment record with a start date in the future for the same book and the same account or contact, then the end date of

the assignment that you import must not be more than 7 days earlier than the start date of the existing assignment record. For example, if a record already exists to assign Book A to Account 1 on Feb 01 next year, and you want to change the start date of the assignment to January 01 next year, then the end date of the record that you import must not be earlier than January 25 next year. If the end date of the assignment record that you import is January 24 or earlier, then the import of the record fails and an error message is returned to indicate that the record already exists.

### **Related Topics**

See the following topics for related information:

- [About Importing Books and Book Assignments](#) (on page 231)
- [Scenario for Using Books to Manage Sales Territories](#) (on page 235)
- [Example of Using Books to Manage Sales Territories](#) (on page 235)

## **Scenario for Using Books to Manage Sales Territories**

This scenario gives one example of how your company might use custom books. In this scenario, custom books are used to manage sales territories. You might use the custom books functionality differently, depending on your business model.

Your company organizes your accounts on a geographical basis and assigns groups of sales representatives to work with the accounts in each geographical area or territory. In addition, you might want to reassign sales representatives from one territory to another for various reasons. When such reassignments happen, you must realign the relationships between sales representatives and territories. Less frequently, an account relocates from one territory to another. When such a relocation happens, you must realign the relationships between accounts and territories. An example of configuring books, users, and accounts to support this scenario is given in [Example of Using Books to Manage Sales Territories](#) (on page 235).

## **Example of Using Books to Manage Sales Territories**

This topic gives an example of using custom books to manage sales territories. You might use the custom books functionality differently, depending on your business model. The example in this topic supports the scenario described in [Scenario for Using Books to Manage Sales Territories](#) (on page 235).

### ***To use books to manage sales territories***

- 1** Create or import the custom books that you want to represent your sales territories.

For information about creating books, see [Creating Books and Book Hierarchies](#) (on page 243). For information about importing books, see [Book Fields: Import Preparation](#) (on page 416).

- 2** Associate your sales representatives with the appropriate territory books.

You can associate users with books directly in Oracle CRM On Demand, or you can import book user records. For information about associating users with books, see [Associating Users with Books](#) (on page 244). For information about importing book user records, see [Book User Fields: Import Preparation](#) (on page 415).

### 3 Configure the Account record type in book mode.

For information about configuring record ownership modes, see [Configuring Record Ownership Modes](#) (on page 242).

### 4 Import the necessary account book records to assign the appropriate territory books to the accounts.

Use the start date on each account book record to specify the date when the assignment is to come into effect, that is, the date from which you want your sales representatives to have access to the account records in their territories. If you want, you can also specify the date when each book assignment is to end.

For more information about importing book assignment records, see the following topics:

- [Account Book Fields: Import Preparation](#) (on page 395)
- [About Importing Books and Book Assignments](#) (on page 231)
- [About Time-Based Book Assignments](#) (on page 232)

After you import the account book records and the book-assignment procedure activates the assignments on the specified start date, your sales representatives can access the records in their territories.

If sales representatives are reassigned from one territory to another, then you must realign the relationships between the sales representatives and the territories.

### ***To realign the relationship between a sales representative and a territory***

- Update the user record for the sales representative, as follows:
  - If the sales representative is assigned to a new territory, then add the territory book to the user record.
  - If the sales representative is no longer assigned to a territory, then remove the book from the user record.

You can update the user record directly in Oracle CRM On Demand, or you can import book user records. For information about associating users with books, see [Associating Users with Books](#) (on page 244). For information about importing book user records, see [Book User Fields: Import Preparation](#) (on page 415).

If accounts relocate from one territory to another, then you must realign the relationships between the accounts and the territories.

### ***To realign the relationship between an account and a territory***

- Update the account record, as follows:
  - Add the new territory book to the account.
  - Remove the old territory book from the user record.

You can update the account record directly in Oracle CRM On Demand, or you can import account book records. For information about assigning records to books, see [Assigning Records to Books](#) (on page 253). For information about importing account book records, see [Account Book Fields: Import Preparation](#) (on page 395).

## Process of Setting Up Books

To set up books for your company, perform the following tasks:

- 1 Contact Oracle CRM On Demand Customer Care, and ask to have the book functionality turned on for your company.

When Oracle CRM On Demand Customer Care turns on the book functionality for your company, several controls become available to you in Oracle CRM On Demand. For information about verifying that these controls are available, and that the Administrator role has been set up to use books, see [Verifying Book Setup for the Administrator Role](#) (on page 238).

- 2 Design your book structure.

For guidelines about designing your book structure, see [About Designing Book Structures](#) (on page 219).

- 3 (Optional) Create book types and book user roles.

For more information, see [Creating Book Types and Book User Roles](#) (on page 241).

- 4 (Optional) Configure the record ownership mode for record types.

For more information, see [About Record Ownership Modes](#) (on page 223) and [Configuring Record Ownership Modes](#) (on page 242).

- 5 Create the books and the book hierarchies.

For more information, see [Creating Books and Book Hierarchies](#) (on page 243).

- 6 Associate users with books.

For more information, see [Associating Users with Books](#) (on page 244).

- 7 Enable books for your company.

For more information, see [Enabling Books for Your Company](#) (on page 248).

- 8 Enable books for users and user roles.

For more information, see [Enabling Books for Users and User Roles](#) (on page 249).

### Related Topics

See the following topics for related information about books and book structures:

- [Book Management](#) (on page 215)
- [About Web Services Support for Books](#) (on page 222)
- [About Importing Books and Book Assignments](#) (on page 231)
- [About Time-Based Book Assignments](#) (on page 232)
- [Scenario for Using Books to Manage Sales Territories](#) (on page 235)
- [Example of Using Books to Manage Sales Territories](#) (on page 235)
- [Adding Books to Record Detail Page Layouts](#) (on page 251)

- [Assigning Records to Books](#) (on page 253)
- [Book Hierarchy Page](#) (on page 255)
- [Book Fields](#) (on page 255)

## Verifying Book Setup for the Administrator Role

To turn on the book functionality for your company, Customer Care does the following:

- Grants the Manage Books privilege and access to books to the administrator's role
- Sets up the access profile for the administrator to allow access to books

The following procedure describes how to verify that the administrator's role is set up for books.

### *To verify that the administrator's role is set up for books*

- 1 Sign in to Oracle CRM On Demand as a user with the Administrator role.
- 2 In the upper-right corner of any page, click the Admin global link.
- 3 In the User Management and Access Controls section of the Admin Homepage, click the User Management and Access Controls link.
- 4 In the Role Management section, click the Role Management link.
- 5 From the Translation Language list, select your company's primary language.
- 6 Click the Edit link for the Administrator role.
- 7 In the Role Management Wizard, go to Step 2, Record Type Access, and verify that the access to book records is as shown in the following table.

The following table shows the book record access that is required for the Administrator role.

Record Type	Has Access?	Can Create?	Can Read All Records?
Books	Selected	Selected	Selected

- 8 Go to Step 4, Privileges, and verify that the Manage Books privilege is selected.

The following table describes the Manage Books privilege.

Category	Privilege	Description
Admin: Users and Access Controls	Manage Books	Manages Book access, assigns data in bulk to Books, and defines Book related workflows

**NOTE:** A user, whose role has the Manage Books privilege as well as the appropriate privileges to manage user roles, can grant that privilege to other user roles. As with most administration tasks, it is recommended that the privilege to manage books is granted to company administrators only.

- 9 Navigate back to the User Management and Access Controls page.

**10** In the Access Profile Management section, click the Access Profiles link.

**11** From the Translation Language drop-down list, select your company's primary language.

**12** Verify that the settings for the access profiles are correct, as follows:

- a** Click the Edit link for the Administrator Default Access Profile, and verify that the settings match those shown in the following table.
- b** Click the Edit link for the Administrator Owner Access Profile, and verify that the settings match those shown in the following table.

The following table shows the required settings that allow users with the Administrator role to manage books in Oracle CRM On Demand.

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Account	Books	Full	Full
Accreditation*	Books	Full	Full
Activity	Books	Full	Full
Allocation*	Books	Full	Full
Application*	Books	Full	Full
Books	Not applicable	Read/Edit/Delete	Read/Edit/Delete
Books	Sub-Books	View	View
Books	User	Full	Full
Business Plan*	Books	Full	Full
Campaign	Books	Full	Full
Certification*	Books	Full	Full
Contact	Books	Full	Full
Course*	Books	Full	Full
Custom Objects	Books	Full	Full
Deal Registration*	Books	Full	Full
Dealer*	Books	Full	Full
Exam*	Books	Full	Full
Financial Account*	Books	Full	Full
Financial Plan*	Books	Full	Full
Fund*	Books	Full	Full

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Household*	Books	Full	Full
Inventory Audit Report*	Books	Full	Full
Inventory Period*	Books	Full	Full
Lead	Books	Full	Full
MDF Requests*	Books	Full	Full
MedEd Event*	Books	Full	Full
Messaging Plan*	Books	Full	Full
Objective*	Books	Full	Full
Opportunity	Books	Full	Full
Partner*	Books	Full	Full
Policy*	Books	Full	Full
Portfolio*	Books	Full	Full
Program*	Books	Full	Full
Sample Lot*	Books	Full	Full
Sample Transaction*	Books	Full	Full
Service Request	Books	Full	Full
Smart Call*	Books	Full	Full
Solution	Books	Full	Full
Vehicle*	Books	Full	Full

**NOTE:** Record types marked with an asterisk (\*) are not available in the standard edition of Oracle CRM On Demand. The access settings for these record types are relevant only if the record types are available.

The following table describes the controls that are enabled by the Manage Books privilege. You can access each component to verify that all of the necessary controls are available to you.

Component	Controls Enabled by the Manage Books Privilege
Admin Homepage	<ul style="list-style-type: none"> <li>In the User Management and Access Controls section, the Book Management link is available. From this link, you can access the Book Hierarchy page, where you can create, update, and manage books.</li> <li>In the Data Management Tools section, the Batch Assign Book Queue link is available. From this link, you can access the Batch Assign Book Queue page, where details of active and completed requests for batch book assignments are displayed.</li> </ul>
Application	<ul style="list-style-type: none"> <li>In the Record Type Setup section, the Book link is available. From this</li> </ul>



Component	Controls Enabled by the Manage Books Privilege
Customization page	link, you can access the Book Application Customization page, where you can set up book fields and book user fields, including the picklist values for the Book Type and Book User Role fields.
Role Management Wizard	<ul style="list-style-type: none"> <li>In Step 2, Record Type Access, the Book option appears as a line item.</li> <li>In Step 4, Privileges, the Manage Books privilege appears as an option.</li> </ul>
Access Profile Wizard	<ul style="list-style-type: none"> <li>In Step 1, Access Profile Name, the Grantable to Book Users check box appears.</li> <li>In Step 2, Specify Access Levels: <ul style="list-style-type: none"> <li>The Book option appears as a top-level object.</li> <li>A line item for the Book related information section appears under the Related Information link for record types that support books.</li> </ul> </li> </ul>
Company Profile Page	<ul style="list-style-type: none"> <li>In the Company Data Visibility Settings section of the page, the Enable Books check box appears.</li> </ul>
Page Layout Wizard (Layout Management)	<ul style="list-style-type: none"> <li>In Step 4, Related Information, the Book related information section appears in the Available section of the page for all record types that support books.</li> </ul>
Rename Record Types Page	<ul style="list-style-type: none"> <li>The Book option appears as one of the items on the page.</li> </ul>
Workflow	<ul style="list-style-type: none"> <li>The Assign a Book action appears as an available option (if your role has the Manage Workflow privilege enabled).</li> </ul>
Menu on List page	<ul style="list-style-type: none"> <li>Batch Assign Book appears as one of the menu options for supported record types.</li> </ul>

## Creating Book Types and Book User Roles

To help you to organize your book structure, you can create book types, and then assign a type to each book that you create. For example, if you plan to have a book hierarchy for territories, you can create a book type called Territory. The Book Type field is an editable picklist field that you can customize to meet your company's needs.

You can also create book user roles that you can assign to users when you associate them with books. Book user roles are not the same as Oracle CRM On Demand user roles. For example, you can create book user roles, such as Territory User and Territory Manager, to be assigned to users who work with the territories book hierarchy.

The following procedure describes how to create book types and book user roles.

### *To create book types and book user roles*

- 1 In the upper-right corner of any page, click the Admin global link.

- 2 Click the Application Customization link.
- 3 In the Record Types Setup section, click Book.
- 4 In the Book Application Customization page, do one of the following:
  - To create book types, click Book Field Setup.
  - To create book user roles, click Book Users Field Setup.
- 5 Click the Edit Picklist link for the field.
- 6 Enter the values for the picklist, and save your changes.

For more information about editing picklist fields, see [Changing Picklist Values](#) (on page 87).

## Configuring Record Ownership Modes

Oracle CRM On Demand allows you to set up the following modes of record ownership to support your business needs:

- User mode
- Book mode
- Mixed mode

For more information about the modes of record ownership, see [About Record Ownership Modes](#) (on page 223).

### *To configure record ownership mode*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the record type that you want to configure.
- 4 In the Field Management section, click *record type* Field Setup, where *record type* is the name of the record type that you want to configure.
- 5 Depending on the record ownership mode that you want to configure, edit the fields as follows:
  - To configure the record type in user mode, configure the Owner field so that it is a required field, and then configure the Book field so that it is not a required field.
  - To configure the record type in book mode, configure the Book field so that it is a required field, and then configure the Owner field so that it is not a required field.
  - To configure the record type in mixed mode, configure both the Owner field and the Book field so that they are not required fields.
- 6 Save your changes.

For more information about editing fields, see [Creating and Editing Fields](#) (on page 75).

**NOTE:** After you configure the record ownership mode, you must make sure that the page layouts for the record type are set up correctly for the record ownership mode. For more information about page layouts for record ownership modes, see [About Field Setup and Page Layouts for Record Ownership Modes](#) (on page 71).

## Creating Books and Book Hierarchies

You create books from the User Management and Access Controls section of the Admin Homepage.

**NOTE:** You can also create books by importing book records. For more information, see [Book Fields: Import Preparation](#) (on page 416).

### Before you begin:

- To perform this procedure, you must have the Manage Books privilege in your user role.
- Before you start to create your books and book hierarchies, read the topic [About Designing Book Structures](#) (on page 219).

The following procedure describes how to create a book.

### To create a book

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section of the Admin Homepage, click the Book Management link.
- 3 On the Book Hierarchy page, click New.
- 4 On the Book Edit page, enter the required information, and then save your record.

The following table describes the information you must enter for the book.

Field	Description
Book Name	For display purposes in the Book selector, the recommended maximum length of a book name is 60 characters.
Book Type	(Optional) Select the book type from the picklist.
Parent Book	<ul style="list-style-type: none"> <li>■ If this is a root book, leave this field blank.</li> <li>■ If this is a subbook, click the Lookup icon next to the Parent Book field, and select the parent book.</li> </ul>
Can Contain Data	<p>Applies only to the current book, not to any subbooks. Select this check box if records will be associated with this book. For performance reasons, apply this feature only to books that contain data.</p> <p><b>NOTE:</b> In the Book selector, which appears throughout Oracle CRM On Demand, custom books containing data are identified by a blue document icon. Custom books that cannot contain data are identified by a yellow folder icon.</p>

## Creating Subbooks

If you want to create subbooks for an existing parent book, you can create the subbooks using the method in the previous procedure, or you can create subbooks as described in the following procedure.

### *To create subbooks for an existing book*

- 1 On the Book Hierarchy page, click the link for the parent book.
- 2 On the Book Details page, click New in the Sub-Books title bar.
- 3 On the Book Edit page, enter the information for the book, and save your changes.

## Moving a Book to a New Parent Book

You can change a book to make it a subbook of another book, or you can move a subbook from one parent book to another. When you change the parent of a book, the book hierarchy changes as follows:

- The new parent applies to the current book and any subbooks that are children of the current book.
- Any users assigned to the old parent book lose access to the current book and its subbooks.
- Any users assigned to the new parent book gain access to the current book and its subbooks.
- Any users assigned directly to the current book are unaffected by the change in the parent book.

**NOTE:** If you want to delete a parent book, you must first remove all its subbooks, users, and data.

**TIP:** To find out how many records a specific book contains, create a historical report for each record type. For information about creating reports, see Reports.

The following procedure describes how to move a book to a new parent book.

### *To move a book to a new parent book*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section of the Admin Homepage, click the Book Management link.
- 3 On the Book Hierarchy page, click the Edit link for the book that you want to change.
- 4 Click the Lookup icon next to the Parent Book field, and select the new parent book.
- 5 Save your changes.

## Associating Users with Books

You can define which users can access a book, and the level of access that each user has to records in the book. When you associate a user with a book, you specify the access profile for the user when working in the book. The following standard options are available:

- **Edit.** Allows the user to read and update the records in the book.
- **Full.** Allows the user to read, edit, and delete the records in the book.
- **ReadOnly.** Allows the user to view the records in the book.

You can also create custom access profiles for books. The Access Profiles picklist on the Book Users Edit page includes all access profiles that have the Grantable to Book Users option selected on them. For information on how to create custom access profiles for books, see [Creating Access Profiles for Books](#) (on page 247).

The Manager Visibility Enabled option on the Company Profile page and the Include Sub-Items option in the Book selector are additional factors in determining a user's access to records. When the Manager Visibility Enabled check box is selected on the Company Profile page, the Include Sub-Items setting on searches allows a user to access data in subbooks and to access data directly or indirectly owned by subordinate users.

The level of access that a user has to books affects the user's overall access rights to records. The following examples show how the user's access rights are determined.

### Example 1

Ryan Taylor, a sales representative, has the following setup in Oracle CRM On Demand:

- Has access to account records through the sales representative role.
- Has the access level on his owner access profile set to ReadOnly for the account record type
- Has the access level on his default access profile set to ReadOnly for the account record type
- Is not a member of the account team for the ABC Widgets account
- Is associated with the Widget Makers book, with his access profile for the book set to Full

If the ABC Widgets account is in the Widget Makers book, Ryan's access rights to the ABC Widgets record allow him to read, edit, and delete the record. He has these access rights, because the access control system in Oracle CRM On Demand calculates the most liberal rights from all of the relevant access profiles and applies them. In this case, the access profile for the book is set to Full, and therefore supersedes the access profile for account records.

### Example 2

Tanya Lee, a sales representative has the following setup in Oracle CRM On Demand:

- Has access to opportunity records through the sales representative role.
- Has the access level on her owner access profile set to ReadOnly for the opportunity record type
- Has the access level on her default access profile set to ReadOnly for the opportunity record type
- Is a member of the opportunity team with the Opportunity Access field set to Edit
- Is associated with the Widget Makers book, with her access profile for the book set to Full

If an opportunity is in the Widget Makers book, Tanya's access rights allow her to read, edit, and delete the record. However, if an opportunity is not in the Widget Makers book, Tanya's access rights (from her owner access profile, her default access profile, and her membership of the opportunity team) allow her to read and edit the opportunity, but she cannot delete the opportunity.

## Methods of Associating Users with Books

You can use three methods to associate users with books:

- From a book record, you can associate multiple users with the book.
- From a user record, you can associate multiple books with the user.
- You can import book user records. For more information, see [Book User Fields: Import Preparation](#) (on page 415).

The following procedure describes how to associate multiple users with a book through the book record.

### *To associate multiple users with a book*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Book Management link.
- 3 On the Book Hierarchy page, click the name link of the book with which you want to associate users.
- 4 On the Book Details page, on the title bar of the Book Users section, click Add Users.
- 5 In the Book Users Edit page, pick the users whom you want to associate with the book.

The following table describes the information that you must specify for each user you associate with the book.

Field	Description
Users	<p>Click the Lookup icon next to the User field and then select the user.</p> <p><b>NOTE:</b> A user's delegates do not automatically get access to a user's book. You must also associate each delegate with the book.</p>
Book User Role	<p>(Optional) Select the role from the picklist.</p> <p><b>NOTE:</b> The book user role is not an Oracle CRM On Demand role. For information about creating book user roles, see <a href="#">Creating Book Types and Book User Roles</a> (on page 241).</p>
Access Profile	<p>From the list of profiles that are enabled for books, select the access profile that determines the user's access rights to the current book and any subbooks. The standard options are:</p> <ul style="list-style-type: none"> <li>■ <b>Edit.</b> Allows the user to read and update the records in the book.</li> <li>■ <b>Full.</b> Allows the user to read, edit, and delete the records in the book.</li> <li>■ <b>ReadOnly.</b> Allows the user to view the records in the book.</li> </ul> <p><b>NOTE:</b> For information about creating custom access profiles for books, see <a href="#">Creating Access Profiles for Books</a> (on page 247).</p>

The following procedure describes how to associate multiple books with a user through the user record.

**To associate multiple books with a user**

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the User and Group Management section, click the User Management link.
- 4 In the User List, click the last name of the user with whom you want to associate books.
- 5 On the User Detail page, on the title bar of the Assigned Books section, click Add Books.  
**NOTE:** If the Assigned Books section is not available on the User Detail page, click the Edit Layout link, and add the section to the page layout.
- 6 On the Assigned Books Edit page, pick the books that you want to associate with the user, and specify the user information for each book.

The following table describes the information that you must specify for each book that you associate with the user.

Field	Description
Book Name	Click the icon to the right of the Book Name field, pick a book in the Book selector, and click OK.
Book User Role	(Optional) Select the role from the picklist.  <b>NOTE:</b> The book user role is not an Oracle CRM On Demand role. For information about creating book user roles, see <a href="#">Creating Book Types and Book User Roles</a> (on page 241).
Access Profile	From the list of profiles that is enabled for books, select the access profile that determines the user's access rights to the current book and any subbooks. The standard options are:  <ul style="list-style-type: none"> <li>■ <b>Edit.</b> Allows the user to read and update the records in the book.</li> <li>■ <b>Full.</b> Allows the user to read, edit, and delete the records in the book.</li> <li>■ <b>ReadOnly.</b> Allows the user to view the records in the book.</li> </ul> <b>NOTE:</b> For information about creating custom access profiles for books, see <a href="#">Creating Access Profiles for Books</a> (on page 247).

**NOTE:** Associating a user with a book does not allow the user to access the book. To allow users to access books, you must enable books for each user, and each user role that wants access to books, as described in [Enabling Books for Users and User Roles](#) (on page 249).

## Creating Access Profiles for Books

When you associate a user with a book, you select an access profile that determines the user's access rights to records in the book and in any subbooks. The access profile for the book is evaluated with all of the other access profiles for the user, and the user is given the most liberal access rights to a record that the access

profiles permit. For more information about how the access profiles interact, see [Associating Users with Books](#) (on page 244).

The standard access profiles available for selection when associating a user with a book are as follows:

- **Edit.** Allows the user to read and update the records in the book.
- **Full.** Allows the user to read, edit, and delete the records in the book.
- **ReadOnly.** Allows the user to view the records in the book.

You can also create custom access profiles for books. The Access Profiles picklist, which appears on the Book Users Edit page and on the Assigned Books Edit page, includes all access profiles that have the Grantable to Book Users option selected.

The following procedure describes how to create an access profile for books.

### *To create an access profile for books*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the Access Profile Management section, click the Access Profiles link.
- 4 Create a new access profile, or edit an existing access profile.
- 5 In Step 1 of the Access Profile wizard, select the Grantable to Book Users check box.
- 6 In Step 2, Specify Access Levels, specify the levels of access for each record type and for the related information types.
- 7 When you finish creating or editing the Access Profile, click Finish to save your changes.

## Enabling Books for Your Company

When you have set up your book structures, you can enable books for your company. The following procedure describes how to enable books for your company.

### *To enable books for your company*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 On the Company Profile page, set the following options. For more information about these options, see [Setting Up Your Company Profile and Global Defaults](#) (on page 16).



- a** In the Company Settings section, ensure that the Global Search Method is set to Targeted Search. When Targeted Search is selected, the Book selector appears in the search section of the Action bar.
- b** In the Analytics Visibility Setting section, set the Historical Subject Areas option to Full Visibility. (This setting ensures that the data in books is synchronized with the data in the database that supports reports and dashboards.)
- c** In the Company Data Visibility Settings section, ensure that the following check boxes are selected:

Setting	Purpose
Enable Books	<p>Use this field to control whether the Book selector displays custom books and user books. If the Enable Books check box is deselected, the Book selector displays only user books and books for delegates if delegates exist.</p> <p><b>NOTE:</b> To see the Enable Books option in the Company Profile page, you must have the Manage Books privilege in your user role.</p> <p><b>CAUTION:</b> You cannot deselect this check box after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.</p>
Display Book Selector	Enables the Book selector that users can use to filter records by user, delegate, or custom book.

## Enabling Books for Users and User Roles

To enable a user to use books, you configure the user's role and the default access profile for the user's role. You also configure the user record for each user.

The following procedure describes how to enable books for a user role. You must perform these steps for each role that uses books.

### *To enable books for a user role*

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3** In the Role Management section, click the Role Management link.
- 4** From the Translation Language list, select your company's primary language.
- 5** Click the link for the role that you want to modify.
- 6** In the Role Management Wizard, go to Step 2, Record Type Access, and configure the access levels for the Books record type.

The following table shows the settings you must configure to allow users (who are not administrators) to access books.

Record Type	Has Access?	Can Create?	Can Read All Records?
Books	Selected	Deselected	Deselected

**NOTE:** You must ensure that the Can Read All Records check box is deselected. Otherwise, the user can access all books in the Book Hierarchy list page.

- 7 Click Finish to save your changes.
- 8 Navigate to the User Management and Access Controls page.
- 9 In the Access Profile Management section, click Access Profiles.
- 10 From the Translation Language list, select your company's primary language.
- 11 Click the Edit link for the Default Access Profile that is used for the user role you are enabling for books, and configure the settings to provide access to books and related record types.

The following table describes the required settings on the Default Access Profile for a user role, which enable access to books for the role. Configuring the default access profile gives the user role the necessary access to books. Therefore, you do not have to configure the owner access profile for the role.

Record Type	Related Record	Default Access Profile
Books	Not applicable	ReadOnly.
Books	Sub Book	View.  This profile allows the user to see all subbooks in the Book Detail page. The default is No Access.
Books	User	Read-Only.  This profile allows the user to see all other users who are associated with the book in the Book Detail page. The default is No Access.

- 12 Click Finish to save your changes.

The following procedure describes how to enable books for a user. You must perform these steps for each user who uses books.

### *To enable books for a user*

- 1 In the upper-right corner of any page, click the Admin global link
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the User Management section, click the User Management link.
- 4 Click the Edit link for the user whose profile you want to modify.
- 5 In the Key User Information section of the User Edit page, configure the following settings:
  - **Default Book for Analytics.** This setting determines the user book or custom book that appears by default for the user in the Book selector on the Reports Homepage and the Dashboards Homepage. The setting displays the user name and sign in ID (by default) of the user whose record you are editing. Change the setting of the record to the custom book or user book where the user most frequently works for reports and dashboards. The setting on the user record does not limit the user's access to data: the user can select a different book or user in the Book selector.
  - **Default Book.** This setting determines the user book or custom book that appears by default for the user in the Book selector when working in any area other than Reports or Dashboards. The setting displays All by default. Change the setting to the custom book or user book where the user most frequently works, so that the user does not have to select the book each time the user wants to work on data in the book. The setting on the user record does not limit the user's access to records: the user can select a different book or user in the Book selector.
- 6 In the User Security Information section of the User Edit page:
  - a Set the value for Reporting Subject Areas to either Manager Visibility or Team Visibility.

**NOTE:** You must select one of these values. Otherwise, reports will not contain any data. The option that you select, Manager Visibility or Team Visibility, does not affect the data in the report.
  - b Set the value for Historical Subject Areas to Full Visibility.
- 7 Click Save.

**NOTE:** To access a book, the user must be associated with the book. In addition, a user's delegates do not automatically have access to a user's books. The delegates must also be associated with the books.

## Adding Books to Record Detail Page Layouts

To make the Books related information section available for users on the detail page for a record type, you must configure the following:

- Make the Books related information section available in the record type page layout for the user role.
- On the access profile for the user role, give the user role access to Books as a related information section on the record type.

The following procedure describes how to make the Books related information section available in a record type page layout.

### ***To make the Books related information section available in a record type page layout***

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** Click the Application Customization link.
- 3** In the Record Type Setup section, click the link for the required record type.  
For example, if you want to make the Books related information available on the Opportunity Detail page, click the Opportunity link.
- 4** In the Page Layout section, click the required Page Layout link (for example, Opportunity Page Layout).
- 5** In the record type Page Layout page, click the Edit link for the page layout where you want to make the Book related information section available.
- 6** In the Page Layout wizard, go to Step 4, Related Information, and click the arrows to move the Books item to the Displayed section.
- 7** Click Finish to save your changes.
- 8** Sign out of Oracle CRM On Demand, and then sign in again.

The following procedure describes how to give a user role access to Books as a related information section on the record type.

### ***To give a user role access to Books as a related information section on a record type***

- 1** In the upper-right corner of any page, click the Admin global link
- 2** In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3** In the Access Profile Management section, click Access Profiles.
- 4** Click the Edit link for the Default Access Profile that is used for the user role where you want to make the Books related information section available.
- 5** In the Access Profile wizard, go to Step 2, Specify Access Levels, and click the Related Information link for the record type where you want to make the Books related information section available.  
For example, if you want to make the Books related information available on the Opportunity Detail page, click the Related Information link beside the Opportunity record.
- 6** Select the access level for Books according to the requirements of the user role.
- 7** Click Finish to save your changes.
- 8** Repeat steps 4 through 7 for the Owner Access Profile that is used for the user role you are enabling for books.

## Assigning Records to Books

You can assign records to custom books in the following ways:

- **One record at a time (manually).** You can select the book value on the record Detail page.
- **In bulk.** You can batch assign records to books.
- **By importing book assignments.** You can import book assignments for accounts and contacts only. For information about importing book assignments, see [About Importing Books and Book Assignments](#) (on page 231).

Records can also be assigned to books using active workflow rules and conditions. For information about using workflow rules, see [About Workflow Rules](#) (on page 277).

## About the Start Date and End Date for Book Assignments on Accounts and Contacts

Book assignments for account and contact records can have a start date and an end date. You can update these fields by using the import assistant or Web services only. You must use the Web Services v1.0 API for all such Web services requests.

A book assignment remains effective until the end date is reached or until the book assignment is removed from the record, whichever comes first. When the end date is reached, the relationship between the book and the record is terminated, and users no longer have access to the record through membership of the book. However, users who have access to the record through other access-control components, such as record ownership or team membership, can still access the record.

For more information about managing time-based book assignments, see [About Time-Based Book Assignments](#) (on page 232).

### Before you begin:

- To assign records to books on a record Detail page, the Detail page layout for the record type must include the Book section.
- To batch assign records to books, you must have the Manage Books privilege in your user role.

The following procedure describes how to assign a single record to a book.

### *To assign a single record to a book*

- 1 Navigate to the Detail page for the record.
- 2 On the title bar of the Books section of the Detail page, click Add.
- 3 In the book selector, choose the book to which you want to assign the record, and click OK.

The following procedure describes how to batch assign records to books.

### *To batch assign records to books*

- 1 In the list window, click the Menu button on the title bar, then click Batch Assign Book.

- 2 In the Batch Assign Book window, click the selector button beside the Target Book box then, in the Book lookup, choose the book to which you want to assign records.

- 3 Choose an Assignment Option for the records in the list.

The following table describes the Assignment Options that you can select.

Option	Description
Add	Adds the Target Book to all records. This assignment does not affect any previous book assignment for the records.
Replace Type	Adds the Target Book to all records and removes any previously assigned books that have the same type as the Target Book.  <b>NOTE:</b> Book Types are defined by your company administrator.
Replace All	Adds the Target Book to all records and removes all previously assigned books, regardless of type.
Replace Book	Specifies the book that you want to replace.  Reassigns records from the book you specify here to the Target Book. Other records are not affected.
Remove	Removes the existing assignment to the Target Book from all records.
Remove All	Removes all assigned books from the records.

- 4 If you choose any option other than Add in step 3, you must now choose an Apply To option.

The following table describes the Apply To options that you can select.

Option	Description
Manual Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made manually
Automatic Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made by workflow or batch
Both	Applies the Assignment Option to all selected records

- 5 To apply your chosen assignment criteria, click Assign.

The Batch Assign Book Queue window opens, showing your assignment request in the Active Requests section. For more information, see [Batch Assign Book Queue Page](#) (on page 562).

When your request has been processed, you will be notified by email.

## Book Hierarchy Page

The Book Hierarchy page shows information about custom books. You can view subsets of books or view all books.

The following table describes the tasks that you can perform from the Book Hierarchy page.

To do this	Follow these steps
View a different subset of books	On the Book Hierarchy title bar, click the list and change the selection to a different subset of books, or select All Books to view all books.
Create a book	On the Book Hierarchy title bar, click New. In the Book Edit page, enter the required information, and save the record.
Create a subbook for an existing book	Click the name link for the parent book. On the Book Details page, click New in the Sub-Books title bar. On the Book Edit page, enter the information for the book, and save your changes.
Move a book to a new parent book	Click the Edit link for the book that you want to change. In the Book Edit page, click the Lookup icon next to the Parent Book field, select the new parent book, and then save your changes.
Associate users with a book	Click the name link of the book. On the Book Details page, click Add Users in the Book Users title bar. On the Book Edit page, pick the users whom you want to associate with the book, and specify the user information. For more information, see <a href="#">Associating Users with Books</a> (on page 244).

## Book Fields

The Book Edit page and the Book Detail page show details of custom books. You can change the details of a book, add subbooks to a book, and add users to a book.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Book Information</b>	
Book Name	The name given to the book.
Parent Book	Shows the name of the parent book if the book is a subbook. If the book is a root book, this field is blank.
Book Type	Books can be assigned a book type to help organize book structures. For information about creating book types, see

Field	Description
	<a href="#">Creating Book Types and Book User Roles</a> (on page 241).
Can Contain Data	Indicates if records can be associated with this book. For performance reasons, books that do not contain data must not have this check box selected.
Partner	Specific to Oracle CRM On Demand for Partner Relationship Management. For more information, see <i>Oracle CRM On Demand for Partner Relationship Management Configuration Guide</i> in the <a href="#">Oracle CRM On Demand documentation library</a> (see Oracle CRM On Demand documentation library - <a href="http://www.oracle.com/technology/documentation/siebelcrmod.html">http://www.oracle.com/technology/documentation/siebelcrmod.html</a> ) on Oracle Technology Network.
Partner Location	Specific to Oracle CRM On Demand for Partner Relationship Management. For more information, see <i>Oracle CRM On Demand for Partner Relationship Management Configuration Guide</i> in the <a href="#">Oracle CRM On Demand documentation library</a> (see Oracle CRM On Demand documentation library - <a href="http://www.oracle.com/technology/documentation/siebelcrmod.html">http://www.oracle.com/technology/documentation/siebelcrmod.html</a> ) on Oracle Technology Network.
<b>Sub-Books Section</b>	
Book Name	The name of a book that is a subbook of the current book.
Book Type	The book type of the subbook.
Can Contain Data	Indicates if records can be associated with the subbook.
<b>Book Users Section</b>	
Last Name	The last name of a user associated with this book.
First Name	The first name of a user associated with this book.
Book User Role	The user's book role for the current book. A book user role can be assigned to a user when the user is associated with a book. Book user roles are not user roles in Oracle CRM On Demand. For information about creating book user roles, see <a href="#">Creating Book Types and Book User Roles</a> (on page 241).
Access Profile	The user's access rights to the current book and any subbooks. Select from the list of profiles that are enabled for books. For information about creating access profiles specifically for books, see <a href="#">Creating Access Profiles for Books</a> (on page 247).



## Information about Troubleshooting Books

For more information about troubleshooting book functionality, see 565278.1 (Article ID) on My Oracle Support.

## Group Management

Group Management is an optional feature that gives your company the ability to set up teams of people who work together, allowing them to share a common set of information.

Setting up groups at your company allows users to do the following:

- Group members can access a merged calendar, showing the availability for all members in their group. This allows employees to determine the best time to schedule appointments and to notify employees (and contacts) of appointments.

**NOTE:** Users must have the Share Calendar privilege assigned to their role to be able to access the merged group calendar. Users who have the Share Calendar privilege can also set up custom calendar views. For more information, see [Viewing Others' Calendars and Adding Custom Calendar Views](#).

- Group members can share ownership of the following record types automatically:

- Activity
- Account
- Contact
- Household
- Opportunity
- Portfolio

When a record is assigned to a member of a group, all members of the group become joint owners of the record. For example, if a user belongs to group XYZ, then any account that is assigned to the user after the user becomes a member of the group is included in the account lists for all members of group XYZ. On such records, the group name appears in the Primary Group field if this field is present on the Detail page layout. All of the members of the group, including the designated owner of the record, appear in the Team related information section on the record Detail page. All members of the group can update the record.

By default, the current group's members have full access to group records that were assigned to a group member after the member joined the group. The details about appointment, task, and contact records that are marked Private cannot be read by other group members.

**NOTE:** For this functionality to work, the Default Group Assignment option in the Company Profile page must be selected. The option must be selected before the groups are created. For more information, see [Setting Up Groups](#) (on page 259).

This behavior applies to groups:

- Each user can belong to only one group.

After a user is added to a group, his name no longer appears on the user list when selecting group members.

- If you select the group assignment option at your company:

- Records that exist before a group is defined are not updated unless the Owner field is updated with a new owner belonging to a group.
- When a user joins a group, the user gains access to the group's records. However, records owned by the new group member prior to the user joining the group are not automatically visible to the existing group members. If a user becomes the owner of records after the user is added to a group, the new records are visible to other group members.

The following example illustrates group record ownership:

- User 1 and User 2 belong to Group 1. User 3 does not belong to Group 1.
  - User 3 owns Account 31. User 1 and User 2 will not have access to Account 31.
  - User 3 is added to Group 1. User 1 and User 2 still will not have access to Account 31.
  - User 3 becomes owner of Account 32. User 1 and User 2 will have access to Account 32.
- If users are deleted from a group, they are removed from all shared records that the group owns. They retain access to their private records.

### About Groups and Record Ownership Modes

Depending on the record ownership mode that you set up for a record type, records of that type might not have an owner. A record might instead have a primary custom book or might have no owner or primary custom book. For more information about record ownership modes, see [About Record Ownership Modes](#) (on page 223). Record ownership modes apply only to record types that support books.

If you change the record ownership mode for a record type, then a record that previously had an owner might have the owner removed from the record when the record is updated for the first time after the ownership mode changes. In this case, if the former owner of the record is a member of a group, then all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a group, then all of the members of the group are removed from the team.

### Groups and Teams

Oracle CRM On Demand distinguishes between *Groups* and *Teams*:

- Groups are set up by the company administrator and apply to entire sets of records across the company. The Group feature must be enabled by Customer Care or by the company administrator when the company is set up for Oracle CRM On Demand.
- The record owners or company administrators set up teams. Teams apply to only those record types that allow teams, including:
  - Account
  - Accreditation
  - Application
  - Business Plan
  - Certification
  - Contact

- Course
- Custom Objects
- Deal Registration
- Exam
- Household
- Lead
- MDF Request
- Objective
- Opportunity
- Partner
- Portfolio
- Service Request
- Special Pricing Request

To set up a team to access the record, the owner must explicitly share that record using the Team section on the record Detail page.

For information on setting up groups, see [Setting Up Groups](#) (on page 259).

### Related Topics

See the following topics for related information about groups and sharing calendars:

- Viewing Others' Calendars
- Adding Custom Calendar Views

## Setting Up Groups

**Before you begin.** Do the following:

- Make sure your role includes the Manage Users and Access privilege.
- To understand how groups work, see [Group Management](#) (on page 257).

### Sequence for Setting Up Groups and Importing Users

When setting up groups, follow this sequence:

- 1 Turn on the Default Group Assignment feature.

**CAUTION:** Before you set up or change a group, the Default Group Assignment feature must be turned on (that is, the Default Group Assignment option in the Company Profile page must be selected), even if you do not plan to use the default group assignment functionality. If you do not turn on this feature before you set up or change a group, the group will not perform correctly. If that happens, you must delete the group, turn on the Default Group Assignment feature, and then create the group again.

- 2 Create groups and assign users to the groups.
- 3 If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, turn off the Default Group Assignment feature when you have finished creating the groups and adding members to the groups.
- 4 Import your records with the default Owner (user), which will propagate groups to the records.

### ***To turn on the default group assignment feature***

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Company Administration link.
- 3 Click the Company Profile link.
- 4 On the Company Profile page, click Edit.
- 5 In the Company Data Visibility Settings section, select the Default Group Assignment check box.
- 6 Save the settings.

### ***To set up a group***

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, in the User and Group Management section, click the Public Sharing Groups link.
- 4 On the Group List page, click New Group.
- 5 On the Group Edit page, complete the required fields.

Field	Description
Name	Limit of 50 characters. Required field by default.
Description	Limit of 255 characters.

**NOTE:** You can rename the group without affecting existing records, since the application uses the underlying group ID to track group records, not the group name. However, your group name needs to be unique within your company.

- 6 Click Save.
- 7 On the Group Detail page, click Add Members.
- 8 On the Group Members page, click the Lookup icons and add users.

Only users who have not been assigned to a group appear on the list. To determine which group a user belongs to, you need to go to that user's Detail page.

**9** Save the record.

**10** If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, turn off the Default Group Assignment feature when you have finished creating the groups and adding members to the groups.

To turn off the Default Group Assignment feature, do the following:

- a** In the upper right corner of any page, click the Admin global link.
- b** Click the Company Administration link.
- c** Click the Company Profile link.
- d** On the Company Profile page, click Edit.
- e** In the Company Data Visibility Settings section, clear the Default Group Assignment check box.
- f** Save the settings.

If you later decide to make changes to the groups or group membership, you must turn on the Default Group Assignment feature again before you make the changes, and then turn it off when you have finished making your changes.

### About Changing the Default Group Assignment Setting

If your company decides to no longer use groups, you should follow this sequence before turning off the Default Group Assignment feature:

- 1** Delete all users except for the one you want to be the Primary Owner of the group's records.
- 2** Delete the group.
- 3** Clear the Default Group Assignment check box on the company profile.

### Related Topics

See the following topics for related information about groups and sharing calendars:

- [Group Management](#) (on page 257)
- Viewing Others' Calendars
- Adding Custom Calendar Views

## Territory Management

You can set up territories and territory hierarchies. For example, a company might organize its sales force into groups or territories. The territories might be based on geography, products, or industries. Each sales group is

responsible for handling the accounts and sales opportunities in its territory. You can use the territories that you set up in Oracle CRM On Demand as the basis for assigning new account and opportunity records. For information on setting up territories, see [Setting Up Territories](#) (on page 262).

## Setting Up Territories

### Before you begin:

- If your territories have not already been defined at your company, determine the naming convention and hierarchy before setting up the information in Oracle CRM On Demand. When entering the information, start from the top level, and then add the subterritories.
- To perform the following procedures, your role must include the Manage Territories privilege.

The following procedure describes how to set up a territory.

### *To set up a territory*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Territory Management link.
- 3 On the Territory Hierarchy page, do one of the following:
  - To add a territory, click New Territory.
  - To update territory information, click the appropriate link in the Territory Name column, and then, on the Territory Detail page, click Edit.
- 4 On the Territory Edit page, enter the required information.

Field	Description
Territory Name	Limit of 50 characters.
Parent Territory	If this is a top-level territory, leave this blank.
Current Quota	You can enter a quota assigned to this territory.
Territory Currency	Inherits your company's default currency.

- 5 Save the record.
- 6 (Optional) On the Territory Detail page, click New in the Child Territories title bar to add subterritories.

### *To update the parent territory*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Territory Management link.

- 3 On the Territory Hierarchy page, select the child territory.
- 4 On the Territory Detail page, click Edit.
- 5 On the Territory Edit page, click the Lookup icon next to the Parent Territory field.
- 6 In the Lookup window, select the parent account.
- 7 Save the record.

### ***To update records with territory***

There are several ways to update the territory field on a record. Typically, this is an automated process:

- **Assignment Manager:** You can use Assignment Manager to populate this field and the related owner and team members for the record.
- **Import:** When you want to update territory ownership on many records, set the reassign owner flag to trigger the assignment of records using Assignment Manager.
- **Manual:** A user can assign their territory to a record.

## **Business Process Management**

Click a topic to see step-by-step instructions to do the following:

- [Creating Processes](#) (on page 270)
- [Adding Transition States to Processes](#) (on page 271)
- [Restricting Processes](#) (on page 273)
- [Configuring the Field Setup for Transition States](#) (on page 274)
- [Enabling Access Controls for Related Record Types](#) (on page 274)
- [Creating Workflow Rules](#) (on page 288)
- [Restricting Workflow Rules to Specific Channels or Roles](#) (on page 293)
- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Changing the Order of Workflow Rules](#) (on page 311)
- [Deactivating Workflow Rules and Actions](#) (on page 312)

- [Deleting Workflow Rules and Actions](#) (on page 314)
- [Viewing Workflow Instances](#) (on page 317)
- [Deleting Instances from the Workflow Monitor](#) (on page 319)
- [Setting Up Assignment Rules](#) (on page 326)
- [Mapping Additional Fields During Lead Conversion](#) (on page 333)
- [Creating Lead Conversion Layouts](#) (on page 333)
- [Setting Up the Forecast Definition](#) (on page 336)
- [Updating the Forecast Definition](#) (on page 342)
- [Setting Up Sales Processes, Categories, and Coaches](#) (on page 343)
- [Customizing Your Company's Industry List](#) (on page 350)

### Related Topics

See the following topics for related information:

- [About Transition States and Transition Fields in Process Administration](#) (on page 265)
- [About Primary Fields in Process Administration](#) (on page 266)
- [Scenario for Locking Activity Records](#) (on page 266)
- [Example of Using Processes to Lock Records](#) (on page 267)
- [Process Administration Functionality](#) (on page 268)
- [Process of Setting Up Processes in Oracle CRM On Demand](#) (on page 270)
- [Workflow Configuration](#) (on page 276)
- [Workflow Monitor](#) (on page 315)
- [About Assignment Rules](#) (on page 321)
- [Lead Conversion Administration](#) (on page 331)

## Process Administration

In the process administration section of Oracle CRM On Demand, you can set up processes to prevent users, including external applications, from performing certain actions on records of a given record type when the records are in a particular state. Preventing users from performing certain actions in this way is referred to as *locking records*.

The process administration functionality is not enabled in Oracle CRM On Demand by default. It must be enabled for each company by Oracle CRM On Demand Customer Care. If your company wants to use the process administration functionality, contact Oracle CRM On Demand Customer Care, and ask to have the Process Administration privilege granted to your company administrator's role.

When Oracle CRM On Demand Customer Care grants the Process Administration privilege to the company administrator, the company administrator can then grant the privilege to other roles.



**NOTE:** The controls that determine which records are locked are the last security component that Oracle CRM On Demand examines when calculating a user's rights to work with a record. The permissions granted by all of the other access-control components are examined first. An *access-control component* is functionality in Oracle CRM On Demand that contributes to the calculation of a user's rights to access and work with records. Examples of access-control components are: record ownership, access profiles, roles, teams, books, and the reporting hierarchy. The controls that lock records do not override any restrictions imposed by the other access-control components.

For information about processes and how to create them, see the following topics:

- [About Transition States and Transition Fields in Process Administration](#) (on page 265)
- [About Primary Fields in Process Administration](#) (on page 266)
- [Scenario for Locking Activity Records](#) (on page 266)
- [Example of Using Processes to Lock Records](#) (on page 267)
- [Process Administration Functionality](#) (on page 268)
- [Process of Setting Up Processes in Oracle CRM On Demand](#) (on page 270)
- [Creating Processes](#) (on page 270)
- [Adding Transition States to Processes](#) (on page 271)
- [Restricting Processes](#) (on page 273)
- [Configuring the Field Setup for Transition States](#) (on page 274)
- [Enabling Access Controls for Related Record Types](#) (on page 274)

## About Transition States and Transition Fields in Process Administration

In a process for a record type, you set up a number of transition states. A *transition state* represents a state that a record enters when certain conditions are met. A *transition field* is a picklist field on the record type that determines the transition of a record from one transition state to another. The picklist field for a process is identified in the definition of the process.

In a process, each value in the transition field can be linked to one transition state. For each transition state, you can specify the following information:

- **Condition.** The condition determines whether a record can move to this transition state.
- **Error message.** The error message appears if the condition is not met when a user tries to move a record to this transition state.
- **Record access controls.** The record access controls determine what actions users are prevented from performing on a record when the record is in the transition state. You can prevent users from deleting or updating records in the transition state.
- **Field setup.** The field setup determines the behavior of certain fields when a record is in the transition state.
- **Related access controls.** The related access controls determine what actions users are prevented from performing on related records when the parent record is in the transition state.

For example, you can set up a process for the Solution record type, using the Status field as the transition field, and add three transition states to the process, one for each of the following status values: Draft, Approved, and Obsolete. You can then prevent users from deleting solutions that are in the transition state for the Approved status, or prevent users from updating solutions that are in the transition state for the Obsolete status, and so on.

## About Primary Fields in Process Administration

You can use a picklist field on a record type to restrict a process so that the process applies only to certain records of that record type. The picklist field is referred to as the *primary field*, and a process applies only to records where the value in the primary field on the record matches one of the values that you specify for the process, that is, the primary values. For example, the Call Type field can be used as the primary field on the Activity record type. You can restrict a process for the Activity record type so that the process applies only to certain types of call records.

## Scenario for Locking Activity Records

This topic gives one example of how sales representatives in a pharmaceutical company use call activity records in Oracle CRM On Demand to record details of their visits to customers and of how the call activity records are locked at certain points. Your company might use Oracle CRM On Demand differently, depending on your business model.

A sales representative plans a visit to a local clinic to restock the sample cabinet at the clinic, and to talk to the head of the clinic about a new product that the pharmaceutical company is about to launch. The sales representative plans to give the head of the clinic a promotional CD that contains clinical trial results and a White Paper. When the sales representative sets up the call activity record in Oracle CRM On Demand, he sets the status of the record to Not Started.

When the sales representative arrives at the clinic, there is a delay while a staff member at the clinic gets the key to the samples cabinet. The sales representative uses the time to update the status of the call activity record in Oracle CRM On Demand to In Progress. The sales representative successfully stocks the samples cabinet, shares the message about the new product with the head of the clinic, and gives her the promotional material.

Towards the end of the day, the sales representative signs in to Oracle CRM On Demand and starts to update the records related to the activities of the day. The sales representative updates the call activity record for the call to the clinic, but he wants to review the record one more time before changing the status of the record to the final status of Submitted. However, the sales representative is scheduled to attend a sales meeting, so he sets the status of the record to Completed and leaves to attend the meeting. At this point, the record cannot be deleted from Oracle CRM On Demand.

When the sales representative returns from the meeting, he reviews the call activity record again and then sets the status of the record to Submitted. At this point, the call activity record cannot be updated, it cannot be deleted from Oracle CRM On Demand, and all of the fields on the record are read-only. In addition, other records cannot be linked to the submitted call activity record. An example of a process that supports this scenario is given in [Example of Using Processes to Lock Records](#) (on page 267).

## Example of Using Processes to Lock Records

This topic gives an example of creating a process to support the scenario described in [Scenario for Locking Activity Records](#) (on page 266). You might use this feature differently, depending on your business model.

You create a process that limits the actions that users can perform, as follows:

- When the status of the record is Completed, users cannot delete the record.
- When the status of the record is Submitted, the following happens:
  - Users cannot update or delete the record, or link other records to the call activity record.
  - All fields on the call activity record are read-only.
- The process applies to account calls and professional calls but not to general calls.

### *To set up a process to lock call activity records*

- 1 In Oracle CRM On Demand, create a process as follows:

- a In the Process Name field, enter a unique name for the process.
- b In the Object Name field, select Activity.

When you select Activity in the Object Name field, the value in the Primary Field is automatically set to Call Type. The Transition Field is automatically set to Status. For more information about creating processes, see [Creating Processes](#) (on page 270).

- 2 Add the transition states shown in the following table to the process that you created in Step 1 of this procedure.

For more information about adding transition states to processes, see [Adding Transition States to Processes](#) (on page 271).

State	Disable Update Check Box	Disable Delete/Remove Check Box
Not Started	Deselected	Deselected
In Progress	Deselected	Deselected
Completed	Deselected	Selected
Committed	Selected	Selected

- 3 Restrict the process so that it applies to account calls and professional calls but not to general calls, by adding the Account Calls and Professional Calls primary values to the process.

For more information about restricting processes, see [Restricting Processes](#) (on page 273).

- 4 On the Submitted transition state, configure the field setup, and select the Read-Only check box for all fields.

For more information about configuring the field setup for transition states, see [Configuring the Field Setup for Transition States](#) (on page 274).

- 5** On the Completed and Submitted transition states, enable the appropriate access controls for the related record types.

The settings for the check boxes are shown in the following table. For more information about enabling access controls for related record types, see [Enabling Access Controls for Related Record Types](#) (on page 274).

Transition State	Related Record Type	Disable Create/Add	Disable Update	Disable Delete/Remove
Completed	Message Responses	Deselected	Deselected	Selected
	Products Detailed	Deselected	Deselected	Selected
	Promotional Item Dropped	Deselected	Deselected	Selected
	Samples Dropped	Deselected	Deselected	Selected
	Sample Transactions	Deselected	Deselected	Selected
	Signatures	Deselected	Deselected	Selected
	Solutions	Deselected	Deselected	Selected
Submitted	Attachments	Selected	Selected	Selected
	Books	Selected	Selected	Selected
	Contacts (M:M)	Selected	Selected	Selected
	Custom Objects 01 through 03	Selected	Selected	Selected
	Message Responses	Selected	Selected	Selected
	Products Detailed	Selected	Selected	Selected
	Samples Dropped	Selected	Selected	Selected
	Sample Transactions	Selected	Selected	Selected
	Signatures	Selected	Selected	Selected
	Solutions (M:M)	Selected	Selected	Selected

## Process Administration Functionality

The following record types are supported for process administration:

- Account

- Activity
- Address
- Business Plan
- Lead
- Messaging Plan
- Objective
- Opportunity
- Sample Disclaimer
- Sample Transaction
- Service Request
- Solution

## Restrictions

The following restrictions apply:

- Only one process can be set up for each of the record types that support process administration.
- For each of the supported record types, the Status field on the record type is used as the transition field for the process. You cannot select an alternative transition field.
- Only the Activity record type supports the use of a primary field to restrict the process. The primary field on the Activity record type is the Call Type field. You cannot select an alternative primary field.
- The options for the field setup for transition states are limited to specifying that certain fields are read-only when a record is in the transition state.
- The Order Number field and the Default check box, which appear on the process record when you save the process, are not used in the current release of Oracle CRM On Demand.

## Related Record Types

For each parent record type that is supported for process administration, you can enable access controls for all of the related record types that are supported for the parent record type and that are available to your company, with the exceptions shown in the following table.

Parent Record Type	Related Record Types Not Supported
Account	<ul style="list-style-type: none"> <li>■ Assessments</li> <li>■ Financial Account: Branch</li> <li>■ Financial Account: Held-Away Institutions</li> </ul>
Activity	Assessments
Business Plan	Assessments

Parent Record Type	Related Record Types Not Supported
Lead	Assessments
Objective	Assessments
Opportunity	Assessments
Service Request	Assessments

## Process of Setting Up Processes in Oracle CRM On Demand

To set up a process in Oracle CRM On Demand, perform the following tasks:

- 1 [Creating Processes](#) (on page 270)
- 2 [Adding Transition States to Processes](#) (on page 271)

You can also optionally perform the following tasks:

- [Restricting Processes](#) (on page 273)
- [Configuring the Field Setup for Transition States](#) (on page 274)
- [Enabling Access Controls for Related Record Types](#) (on page 274)

## Creating Processes

To create a process, complete the steps in the following procedure. This task is a step in [Process of Setting Up Processes in Oracle CRM On Demand](#) (on page 270).

**Before you begin.** To perform this procedure, your role must include the Process Administration privilege.

### *To create a process*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Process Administration.
- 3 In the Process List page, click New.
- 4 In the Process Edit page, fill in the process information.
- 5 Save your changes.

**NOTE:** The Order Number field and the Default check box that appear on the Process Detail page when you save a process are not used in the current release of Oracle CRM On Demand.

The following table describes the process fields. For more information about how these fields are used in the current release of Oracle CRM On Demand, see the restrictions listed in [Process Administration Functionality](#) (on page 268).

Field	Description
Process Name	The record type for the process. For a list of the record types for which you can create processes, see <a href="#">Process Administration Functionality</a> (on page 268).
Primary Field	The name of the field in the record type that is to be used as a filter to restrict the process to certain records of the record type. This field is read-only. For the Activity record type, the default value in the Primary Field is Call Type. For other record types, the field is blank. For more information about primary fields, see <a href="#">About Primary Fields in Process Administration</a> (on page 266).
Transition Field	The name of the field in the record type that determines the transition of records from one transition state to another. This field is read-only. For all supported record types, the default value is Status. For more information about transition fields, see <a href="#">About Transition States and Transition Fields in Process Administration</a> (on page 265).
Description	(Optional) A description of the process.

## Adding Transition States to Processes

In a process, you can link each value in the transition field to one transition state. For more information about transition fields and transition states, see [About Transition States and Transition Fields in Process Administration](#) (on page 265).

To add a transition state to a process, complete the steps in the following procedure. This task is a step in [Process of Setting Up Processes in Oracle CRM On Demand](#) (on page 270).

**Before you begin.** To perform this procedure, your role must include the Process Administration privilege.

### *To add a transition state to a process*

- 1 In the Process List page, click the Process Name link for the process to which you want to add the transition state.
- 2 In the Process Detail page, scroll to the Transition States section of the page, and then click Add in the title bar of the section.

- 3 In the Transition State Edit page, fill in the transition state information.
- 4 Save your changes.
- 5 Repeat Step 2 through Step 4 of this procedure for each transition state that you want to add to the process.

The following table describes some of the transition state fields. The headings in the Key Information section and the Validation section of the page in Oracle CRM On Demand show the name of the transition field.

Field	Description
<b>Key Information</b>	
State	The transition field value that identifies this transition state. Each transition field value can be used with only one transition state in the process. When a value has been used with a transition state, the value is removed from the picklist of values in the State field.
Category	(Optional) The sales category that the transition state is associated with.
Description	(Optional) A description of the transition state.
<b>Validation</b>	
Condition	<p>(Optional) A condition that determines whether a record can move to this transition state.</p> <p>You can enter an expression directly in the text box, or click the <i>fx</i> icon to open the Expression Builder window, where you can define an expression. For more information about Expression Builder, see <a href="#">Expression Builder</a> (on page 588).</p> <p>Do not use any calculated fields in the expression. Calculated fields are not supported in expressions in the Condition field on transition states.</p> <p>If the condition that you specify is not met when a user tries to move a record of the record type specified in the process to this transition state, then an error message appears and the user's changes are not saved.</p>
Error Message	(Optional) The text of the error message that appears if the condition set for the transition state is not met when a user tries to move a record of the record type specified in the process to this transition state.
<b>Record Access Control</b>	



Field	Description
Disable Update	(Optional) If this check box is selected, then users, including external applications, cannot update records of the record type specified in the process when the records are in this transition state.
Disable Delete/Remove	<p>(Optional) If this check box is selected, then users, including external applications, cannot delete records of the record type specified in the process while the records are in this transition state.</p> <p>Also, if a record in this transition state is a child of a parent record, then users cannot remove the record from the relationship if doing so results in the child record being deleted from Oracle CRM On Demand.</p> <p>However, if removing the child record from the relationship with the parent record does not result in the child record being deleted from Oracle CRM On Demand, then the record can be removed from the relationship while the record is in this transition state, but it cannot be deleted.</p>

## Restricting Processes

To restrict a process so that it applies only to certain records of that record type, you specify which values in the primary field in the record type are valid for the process. For more information about primary fields, see [About Primary Fields in Process Administration](#) (on page 266).

To restrict a process, complete the steps in the following procedure.

**Before you begin.** To perform this procedure, your role must include the Process Administration privilege.

### *To restrict a process*

- 1 In the Process List page, click the Process Name link for the process that you want to restrict.
- 2 In the Process Detail page, scroll to the Primary Values section of the page, and then click Add in the title bar of the section.
- 3 In the Primary Value Edit page, in the Value field, select the values to which the process is to be restricted.

You can select up to five values in the Primary Value Edit page. If you want to select additional values, you can repeat this procedure.

- 4 Save your changes.
- 5 Repeat Step 2 through Step 4 of this procedure as many times as necessary to add more primary values.

## Configuring the Field Setup for Transition States

You can specify how certain fields behave when a record is in the transition state by configuring the field setup for the transition state.

To configure the field setup for a transition state, complete the steps in the following procedure.

**Before you begin.** To perform this procedure, your role must include the Process Administration privilege.

### *To configure the field setup for a transition state*

- 1 In the Process Detail page, click the link in the State field for the transition state for which you want to configure the field setup.
- 2 In the Transition State Detail page, scroll to the Field Setup section of the page, and then click Add in the title bar of the section.
- 3 In the Field Setup Edit page, specify the behavior of fields when a record of the record type specified in the process is in this transition state, as follows:
  - a Select the field in the Field list.
  - b Select the check box for the behavior that you want to configure for the field.

**NOTE:** For information about restrictions that apply to configuring the field setup for transition states, see [Process Administration Functionality](#) (on page 268).

**CAUTION:** If you want to set a check box field as read-only, the field must already be displayed on the page layout where it is to be used. Otherwise, when the field is added to a page layout, an error message is displayed when users try to save a record of this type.

You can specify settings for up to five fields in the Field Setup Edit page. If you want to specify settings for additional fields, you can repeat this procedure.

- 4 Save your changes.
- 5 Repeat Step 2 through Step 4 of this procedure as many times as necessary to set up all the fields that you want to configure for the transition state.

## Enabling Access Controls for Related Record Types

You can limit the actions that users can perform on the related records when a parent record is in the transition state by enabling access controls for the related record types.

**NOTE:** Some record types do not have related record types.

To enable access controls for related record types, complete the steps in the following procedure.

**Before you begin.** To perform this procedure, your role must include the Process Administration privilege.

### *To enable access controls for related record types*

- 1 In the Process Detail page, click the link in the State field for the transition state on which you want to enable access controls for related record types.
- 2 In the Transition State Detail page, scroll to the Related Access Control section of the page, and then click Add in the title bar of the section.

- 3 In the Related Access Control Edit page, for each related record type, select the check boxes for the access controls that you want to enable.

You can enable access controls for up to five related record types in the Related Access Control Edit page. If you want to enable access controls for additional related record types, you can repeat the procedure.

**NOTE:** In the Related Access Control Edit page, the check boxes for the access controls are marked as required; that is, an asterisk appears beside the name of each of the check boxes. The check boxes are marked as required because these check box fields always have a value in the database. The value is either True, that is, the check box is selected, or False, that is, the check box is deselected. If you select a check box, the True value is saved in the database. If you do not select a check box, the False value is saved in the database.

- 4 Save your changes.
- 5 Repeat Step 2 through Step 4 of this procedure as many times as necessary to enable the access controls for the related record types for the transition state.

The following table describes the access controls for the related record types. Some related record types are not available. For a list of the related record types that are not available, see [Process Administration Functionality](#) (on page 268).

**NOTE:** Users can be external applications as well as users of Oracle CRM On Demand.

Field	Description
Disable Create/Add	If this check box is selected, then users cannot create new records of this related record type from the parent record or add existing records of this record type to the parent record while the parent record is in this transition state.
Disable Update	<p>The behavior of this check box depends on the relationship between the parent record type and the related record type, as follows:</p> <ul style="list-style-type: none"> <li>■ If the parent record type has a one-to-many relationship with the related record type, and if this check box is selected, then users cannot update records of this related record type that are child records of the parent record, while the parent record is in this transition state.</li> </ul> <p>The child records cannot be updated from anywhere in Oracle CRM On Demand while the parent record is in this transition state. For example, if there are related records of</p>

Field	Description
	<p>the Custom Object 05 record type on the parent record, then those Custom Object 05 records cannot be updated while the parent record is in this transition state even if they are accessed from the Custom Object 05 Homepage.</p> <ul style="list-style-type: none"> <li>■ For related record types that have a many-to-many relationship with the parent record type, the Disable Update check box is not applicable, that is, it cannot be used to prevent users from updating related records of that type while the parent record is in this transition state.</li> </ul>
Disable Delete/Remove	<p>The behavior of this check box depends on the relationship between the parent record type and the related record type, as follows:</p> <ul style="list-style-type: none"> <li>■ If the parent record type has a one-to-many relationship with the related record type, and if this check box is selected, then users cannot delete records of this related record type that are child records of the parent record while the parent record is in this transition state.</li> </ul> <p>The child records cannot be deleted from anywhere in Oracle CRM On Demand while the parent record is in this transition state.</p> <ul style="list-style-type: none"> <li>■ If the related record type has a many-to-many relationship with the parent record type, and if this check box is selected, then users cannot remove child records of this record type from their relationship with the parent record while the parent record is in this transition state. However, users can delete the child records from other places in Oracle CRM On Demand, such as from a list accessed from the record-type Homepage.</li> </ul>

## Workflow Configuration

To configure workflow rules to meet your company's business requirements, do the following:

- 1 Work with all the stakeholders to plan the business processes.
- 2 Document all of the workflow rules and the corresponding workflow actions that you must configure. For more information about the components of workflow rules, see [About Workflow Rules](#) (on page 277).
- 3 Sign in to Oracle CRM On Demand as the company administrator, and create the workflow rules. For more information, see [Creating Workflow Rules](#) (on page 288).
- 4 Within the new workflow rules, define all the required workflow actions. For information about creating the various types of workflow actions, see the following topics:
  - [About Workflow Actions](#) (on page 284)

- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## About Workflow Rules

A *workflow rule* is an instruction to Oracle CRM On Demand to perform one or more actions automatically each time a specified event occurs.

## About Setting Up Workflow Rules Functionality

If you are a new customer, then the workflow rules functionality is automatically enabled. However, if you are an existing customer, then Oracle CRM On Demand Customer Care and your company administrator must configure the Oracle CRM On Demand workflow rules functionality:

- **Oracle CRM On Demand Customer Care Setup.** When Oracle CRM On Demand Customer Care sets up workflow rule functionality, the Workflow Configuration link is visible in the Business Process Management section of the Admin Homepage. Also, the Administrator user role has the Manage Data Rules - Manage Workflow Rules privilege enabled. For more information about user roles, see [Adding Roles](#) (on page 210).
- **Enable Workflow option.** Workflow rules cannot be executed until the company administrator selects the Enable Workflow check box on the Company Profile page. For information about configuring your company profile, see [Setting Up Your Company Profile and Global Defaults](#) (on page 16).
- **Integration events.** An *integration event* is a mechanism for triggering external processes that are based on changes to the records in Oracle CRM On Demand, including create, update, delete, associate, dissociate, restore, and merge operations. You can specify which fields on a record that you want to track. If your company wants to use workflow rules to create integration events, contact Oracle CRM On Demand Customer Care to request support for Integration Event Administration and to specify the total size of the integration event queues that you require. When the value changes in a tracked field, the change is recorded in the integration event. You can also specify to which integration event queues the integration events are added. For more information about managing integration events, see [About Integration Events](#) (on page 563).
- **Books.** If your company wants to use workflow rules to update the associations between records and books, contact Oracle CRM On Demand Customer Care to request support for Book Management. For more information about book management, see [Book Management](#) (on page 215).

## Trigger Events and Actions on Workflow Rules

A workflow rule is evaluated when the event specified on the rule (the trigger event) occurs. If the conditions on the rule are met (or if there are no conditions on the rule), then the actions specified on the rule are

performed. For example, you can create a workflow rule to specify that when an opportunity is created (the workflow rule trigger event), an email is sent to the opportunity owner's manager (the workflow rule action). You can also specify that the email is sent only if the revenue on the opportunity is in excess of a certain amount (the workflow rule condition), and you can specify the content of the email.

You can also configure workflow rules so that actions are performed when a specified period of time has passed, or when a specified date and time is reached. For more information about time-based workflow actions, see [About Time-Based Workflow Rules](#) (on page 286).

Workflow rules can be triggered by one of the following:

- A record is created, updated, restored, merged, or deleted.
- A record is associated with another record or dissociated from another record.

Association and dissociation workflow rule triggers are supported for associations between certain record types only. For more information, see the Association and Dissociation Trigger Events section of this topic.

Workflow rules are configured for a record as a whole, and not for individual fields. There are several types of trigger events for workflow rules, but each workflow rule has only one trigger event. Depending on the trigger event you select for the rule, you can specify that Oracle CRM On Demand is to perform one or more actions automatically when the workflow rule conditions are met.

**NOTE:** After a rule is created, you cannot change the record type or trigger event on the rule. However, you can update the workflow condition.

The trigger event for each rule is shown on the Workflow Rules List Page and on the Workflow Rule Detail page. The following table shows the actions that are available for each trigger event.

Trigger Event	Available Actions
When New Record Saved	<ul style="list-style-type: none"><li>■ Send Email</li><li>■ Create Task</li><li>■ Assign a Book</li><li>■ Create Integration Event</li><li>■ Wait</li><li>■ Update Values</li></ul>
When Modified Record Saved	<ul style="list-style-type: none"><li>■ Send Email</li><li>■ Create Task</li><li>■ Assign a Book</li><li>■ Create Integration Event</li><li>■ Wait</li><li>■ Update Values</li></ul>
Before Record Is Deleted	<ul style="list-style-type: none"><li>■ Send Email</li><li>■ Create Task</li><li>■ Create Integration Event</li></ul>

Trigger Event	Available Actions
Before Modified Record Saved	<ul style="list-style-type: none"> <li>Update Values</li> </ul>
After Association With Parent	<ul style="list-style-type: none"> <li>Send Email</li> <li>Create Integration Event</li> <li>Wait</li> </ul>
After Dissociation From Parent	<ul style="list-style-type: none"> <li>Send Email</li> <li>Create Integration Event</li> <li>Wait</li> </ul>
When Record Is Restored	<ul style="list-style-type: none"> <li>Send Email</li> <li>Create Integration Event</li> <li>Create Task</li> </ul>
When Records Are Merged	<ul style="list-style-type: none"> <li>Send Email</li> <li>Create Integration Event</li> <li>Create Task</li> </ul>

Three additional workflow actions are available only in Oracle CRM On Demand for Partner Relationship Management:

- Partner Book Sync
- Book Partner Sync
- Owner Partner Account Sync

For more information on these actions and how you can use them, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*, available from the [Oracle CRM On Demand documentation library](http://www.oracle.com/technology/documentation/siebelcrmod.html) (see Oracle CRM On Demand documentation library - <http://www.oracle.com/technology/documentation/siebelcrmod.html>) on Oracle Technology Network.

## Restrictions That Apply to Workflow Rules and Rule Actions

The following restrictions apply to workflow rules and rule actions:

- Workflow rule conditions.** If you define conditions on a workflow rule, then the workflow rule actions are performed only if the rule conditions are met when the rule is triggered. If the conditions are not met, then the actions are not performed. If you do not define any conditions on a workflow rule, then the workflow rule actions are performed each time the rule is triggered.
- Multiple actions on workflow rules.** You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule. If you try to create more than 25 actions on a rule, then you receive an error message. Where there are multiple actions on a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule. For more information about workflow actions, see [About Workflow Actions](#) (on page 284).

**NOTE:** If a workflow action terminates unexpectedly without being completed, then any remaining actions on the rule are not performed.

- **Record types.** You can create workflow rules for a number of record types. However, each workflow rule applies to only one record type. This means that if you create a workflow rule for a specific record type and you want the same action to occur for another record type, you must create a second workflow rule (with the same trigger event, rule conditions, and action) for the second record type.
- **Single-record context.** A workflow rule that is triggered when a record is created, updated, or deleted, is restricted to work in the context of a single record—that is, such a workflow rule can access and update fields on only one record.

**NOTE:** When a workflow rule is triggered by a record association or dissociation action, the integration event created by the workflow can contain fields from both the child record and the parent record.

## Workflow Rules Order

When you create a workflow rule, Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules that are based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for rules that are based on the same record type, the same trigger event, and the same parent record type. The order number determines the order in which Oracle CRM On Demand invokes a sequence of workflow rules that are based on the same record type and the same trigger event, and if applicable, on the same parent record type. You can change the order of your rules. For more information about changing the order of workflow rules, see [Changing the Order of Workflow Rules](#) (on page 311).

## Exiting a Sequence of Workflow Rules

You can specify that Oracle CRM On Demand is to stop processing a sequence of workflow rules if the condition on a workflow rule is met. When a workflow rule is triggered, the condition on the rule is evaluated. If the condition on the rule is met and the Exit check box on the workflow rule is selected, then the active actions on the current workflow rule are performed, but the subsequent workflow rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type, are not processed.

## Association and Dissociation Trigger Events

Association and dissociation trigger events on workflow rules are supported for associations between certain record types only. The following actions are available for association and dissociation trigger events:

- **Send Email.** This action is available for all association and dissociation trigger events.
- **Wait.** This action is available for all association and dissociation trigger events.
- **Create Integration Event.** This action is available for some associations only.

The following table lists the associations that support association and dissociation trigger events and indicates which of the associations support the Create Integration Event action.

Parent Record Type	Record Type	Create Integration Event Action Supported



Parent Record Type	Record Type	Create Integration Event Action Supported
Account	Contact	Yes
Account	Custom Object 01	No
Account	Custom Object 02	No
Account	Custom Object 03	No
Activity	Contact	No
Contact	Account	Yes
Contact	Custom Object 01	No
Contact	Custom Object 02	No
Contact	Custom Object 03	No
Contact	Opportunity	Yes
Opportunity	Contact	Yes
Opportunity	Custom Object 02	No

The following table lists the actions that can trigger an association or dissociation workflow rule. It also shows the integration events that are generated by the workflow rule in each case (if an integration event action is configured on the workflow rule).

**NOTE:** Depending on the data in the records, additional integration events can be generated. For example, if a new contact created on an account is the primary contact for the account, an additional (account update) integration event is generated.

Action	Parent Record	Child Record	Channel	Integration Event
Create a new contact on an account.	Account	Contact	User Interface	Account: Update Contact : Insert Contact: Associate
			Web Services	Contact: Insert Contact: Associate Account: Update
Link an existing contact to an account.	Account	Contact	User Interface	Account Contact: Insert Contact: Update
			Web Services	Contact: Associate Account: Update

Action	Parent Record	Child Record	Channel	Integration Event
Remove a contact from an account.	Account	Contact	User Interface	Account Contact: Delete Contact: Update (primary contact only)
			Web Services	Contact: Dissociate Account: Update
Link an existing account to a contact.	Contact	Account	User Interface	Account Contact: Insert Account: Update
			Web Services	Account Contact: Insert Contact: Update
Remove an account from a contact.	Contact	Account	User Interface	Account Contact: Delete Contact: Update (primary contact only)
			Web Services	Account Contact: Delete Contact: Update (primary contact only)
Create a new opportunity on a contact.	Contact	Opportunity	User Interface	Opportunity: Insert Opportunity: Associate
			Web Services	Opportunity: Insert Opportunity: Associate Contact: Update
Remove an opportunity from a contact.	Contact	Opportunity	User Interface	Opportunity: Dissociate
			Web Services	Opportunity: Dissociate
Create a new contact on an opportunity. <b>NOTE:</b> This action is not available through the user interface.	Opportunity	Contact	Web Services	Contact: Insert Contact: Associate
Link an existing contact to an	Opportunity	Contact	User Interface	Opportunity: Update Opportunity Contact Role: Insert

Action	Parent Record	Child Record	Channel	Integration Event
opportunity.			Web Services	Contact: Associate Opportunity: Update
Remove a contact from an opportunity.	Opportunity	Contact	User Interface	Opportunity Contact Role: Delete Opportunity: Update
			Web Services	Contact: Dissociate Opportunity: Update

## Workflow Rule Action Failures

If a workflow rule action fails to complete, then the following happens:

- If an Update Value action fails, then the operation that triggered the rule is blocked and none of the other actions on the workflow rule are performed. An error message is displayed telling the user that the operation has failed.
- If any other type of workflow rule action fails, then the user gets an error message but the operation that triggered the rule is not blocked, and other actions on the rule are performed. Some error messages, such as the message that is returned when a Create Task action fails because the user is not allowed to create a task, are not displayed to the user. Such errors are written to the log file.

## Record Visibility and Workflow Actions

When a user performs an action that triggers a workflow rule, some of the actions on the workflow rule can fail if the user's action resulted in the user losing visibility to the record.

For example, you might have a workflow rule that is triggered when a modified account record is saved. If a user who owns an account record reassigns the account to another user, then the workflow rule is triggered when the account record is saved. If the original owner of the record no longer has visibility to the account record through any other means, such as team or book membership, then any workflow action that requires access to the account record fails.

## Record Ownership Modes and Workflow Actions

You can configure record types that support custom books in different ownership modes: user mode, mixed mode, or book mode. For more information about records ownership modes, see [About Record Ownership Modes](#) (on page 223). The record ownership mode interacts with workflow rules and actions.

If an Assign a Book workflow action attempts to remove the primary custom book from a record, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in mixed mode, then Oracle CRM On Demand removes the value in the Book field on the record when the primary custom book is removed from the record.

- If the record type is configured in user mode, then none of the books on the record is a primary custom book, and the record ownership mode does not impact the workflow action.

If a workflow action has a dependency on the value in the Owner field on a record, such as when a Send Email action is configured to send email using the Relative User on Record option, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in user mode or mixed mode, and the field that identifies the relative user on the record is blank, then the workflow action fails.

For example, if you configure a Send Email action to send email to an account owner and the Account record type is configured in mixed mode, then the workflow action fails if the Owner field on the account record is blank. However, if the Owner field is populated, then the workflow action succeeds.

## Latency

Workflow rules are evaluated in sequence and synchronously. Therefore, until all the rules are evaluated, the overall update operation is not completed. Workflow rules add a certain amount of latency to operations (that is, the time between the start of an operation and its completion). For example, each task created by a workflow rule can add as much as 20% latency to a record update operation. Each email created by a workflow rule adds about 5% latency.

Expressions take less time to evaluate. To minimize latency, add mutually exclusive expressions to your workflow conditions. Build your workflow rules incrementally, keeping performance in mind.

Click a topic to see step-by-step procedures to do the following:

- [Creating Workflow Rules](#) (on page 288)
- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Changing the Order of Workflow Rules](#) (on page 311)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## About Workflow Actions

You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

You can create the following types of workflow actions:

- **Assign a Book.** The Assign a Book action assigns a book to a record when the conditions on the workflow rule are met.

- **Create Integration Event.** The Create Integration Event action sends an integration event to one or more integration queues when the conditions on the workflow rule are met and a change is detected in at least one of the fields that are tracked by the Create Integration Event action.
- **Create Task.** The Create Task action creates a task when the conditions on the workflow rule are met.
- **Send Email.** The Send Email action sends email when the conditions on the workflow rule are met.
- **Update Values.** The Update Values action updates fields when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what data was changed). The action is performed at the end of the wait period defined in one or more Wait actions that precede the Update Values action on the workflow rule.
- **Wait.** The Wait action causes Oracle CRM On Demand to delay the execution of other (following) actions on a workflow rule until a period has passed, or a certain date and time have been reached.

Three additional workflow actions are available only in Oracle CRM On Demand for Partner Relationship Management:

- Partner Book Sync
- Book Partner Sync
- Owner Partner Account Sync

For more information on these actions and how you can use them, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*, available from the [Oracle CRM On Demand documentation library](http://www.oracle.com/technology/documentation/siebelcrmod.html) (see Oracle CRM On Demand documentation library - <http://www.oracle.com/technology/documentation/siebelcrmod.html>) on Oracle Technology Network.

**NOTE:** If you specify more than one action for a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. After you have created the actions for the workflow rule, you can change the order of the actions. For more information, see [Changing the Order of Workflow Rule Actions](#) (on page 310).

When creating actions for workflow rules, you use Expression Builder to select fields from records and to define expressions to calculate variables. You can merge the record fields and variables in the subject and message body text of an email, the subject and description text of a task, or the new value for a field that you want to update. You can also use Expression Builder to calculate the duration or the end date and time of a wait period in Wait actions on workflow rules. Field names and variables in the expressions you define are replaced by values when the workflow rules are implemented. For more information about Expression Builder, see [Expression Builder](#) (on page 588).

For step-by-step procedures for creating workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)

## Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## About Time-Based Workflow Rules

You can configure workflow rules so that actions are performed when a time limit has expired. For example, you can configure a rule so that an action on the rule is performed when the due date of a record has passed, or if a record has not been worked on for some time.

To configure a time-based workflow rule, you add one or more Wait actions to the rule. In each case where you want a time-based action to be performed, you create a Wait action that specifies the period of time for the delay, or the end-date and time of the delay. You can specify periods of time or dates directly, or you can create an expression to calculate the period or date. You then order the actions on the rule so that the Wait action comes immediately before the action that you want to delay. If more than one rule is required to fulfill a business process, you order the rules appropriately to achieve your objective.

## About Reevaluating Workflow Conditions After Wait Actions

Using Wait actions, you can specify if the workflow rule condition is to be reevaluated when the waiting period ends. If the Reevaluate Rule Conditions After Wait check box on the Wait action is selected, then when the wait period ends the record is reread and reevaluated against the condition on the workflow rule.

If the rule condition is not met (because the record has been changed during the wait period), the remaining actions on the rule are not performed. By default, the Reevaluate Rule Conditions After Wait check box is selected on Wait actions.

If you deselect the Reevaluate Rule Conditions After Wait check box on a Wait action, then when the wait period ends the record is reread and the next action on the rule is performed without checking that the record still meets the rule condition. If you have more than one Wait action on a rule, the Reevaluate Rule Conditions After Wait check box must be selected on each Wait action where you want the rule condition to be reevaluated when the wait period ends.

## Example of Using Time-Based Workflow Rules

The following is an example of how time-based workflow rules might be used. You might use time-based workflow rules differently, depending on your business model.

Three priority options are used for service requests: Standard, Urgent, and Critical. The priority of a service request is set to Standard by default when the service request is created. A business process for service escalation requires the following actions:

- 1 After a new service request is created, and if the status of the service request is not updated within 24 hours, the priority of the service request is changed to Urgent and an email is sent to the owner of the service request to notify the owner that the service request must be updated.

- 2 If another 24 hours pass without a change to the status of the service request, the following happens:
  - The Priority field on the service request is changed to Critical
  - The service request is reassigned to the original owner's manager
  - An email is sent to the original owner of the service request and to the new owner to tell them that the service request has been reassigned to the owner's manager and the Priority has been changed to Critical

To meet this requirement, the company administrator sets up a workflow rule for the service request record type, which is configured as follows:

- 1 The rule trigger is set to the following value: When New Record Saved.
- 2 The rule condition specifies that the status of the service request is not set to Pending, as follows:  
[<Status>] <>LookupValue("SR\_STATUS", "Pending")
- 3 The following sequence of actions is on the workflow rule:
  - a A Wait action with a duration of 24 hours, with the Reevaluate Rule Conditions After Wait check box selected
  - b An Update Values action to change the Priority field on the service request to Urgent
  - c A Send Email action to send email to the owner of the service request to notify the owner that the priority of the service request has changed to Urgent and the service request must be updated
  - d A Wait action with a duration of 24 hours, with the Reevaluate Rule Conditions After Wait check box selected
  - e An Update Values action to change the Priority field on the service request to Critical
  - f An Update Values action to assign the original owner's manager as the new owner
  - g A Send Email action to send email to the owner of the service request and to the owner's manager to notify them that the service request has been reassigned and the priority of the service request has changed to Critical

For information about creating Wait actions and Update Values actions on workflow rules, see [Creating Workflow Actions: Wait](#) (on page 308) and [Creating Workflow Actions: Update Values](#) (on page 306).

## Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Deactivating Workflow Rules and Actions](#) (on page 312)

- [Deleting Workflow Rules and Actions](#) (on page 314)

## Creating Workflow Rules

**Before you begin.** Workflow functionality in Oracle CRM On Demand must be set up for your company, as described in [About Workflow Rules](#) (on page 277). To perform the procedures described in this topic, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 210).

**NOTE:** After a rule is created, you cannot change the record type or trigger event on the rule. However, you can update the workflow condition.

### *To create a workflow rule*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, do one of the following:
  - To create a new workflow rule by copying an existing one, click Copy on the workflow rule that you want to copy.
  - To create a new workflow rule that is not based on an existing rule, click New on the title bar.
- 4 In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the rule information.

The following table describes the rule fields.

Field	Description
Workflow Name	Enter a unique name, up to 50 characters.
Active	Use the Active check box to enable and disable the rule. Any number of workflow rules can be active at the same time.
Order	This field is read-only when you create the workflow rule. It determines the order in which Oracle CRM On Demand invokes the rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type. Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules based on the same record type, the same trigger event, and the same parent record type. Later, you can change the order of the workflow rules. For more information, see <a href="#">Changing the Order of Workflow Rules</a> (on page 311).



Field	Description
Exit	<p>If you select the Exit check box on this workflow rule, and if the condition on the rule is met, then the active actions on this workflow rule are performed. However, none of the subsequent workflow rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type, are triggered.</p> <p>If the condition on this workflow rule is not met, then Oracle CRM On Demand proceeds to the next rule in the sequence, regardless of the setting of the Exit check box on this workflow rule.</p>
Record Type	<p>Select the record type for the workflow rule.</p> <p>For create, update, and delete trigger events, each workflow rule relates to one record type only. The rule is evaluated for that type of record and the actions are performed on that type of record. After a rule is created, you cannot change the record type on the rule.</p> <p>For workflow rules where the trigger event is After Association With Parent trigger event or After Dissociation From Parent, select the record type of the child record. For example, if you want the workflow rule to be triggered when a contact record is associated with an account record, select Contact in this field, and select Account in the Parent Record Type field.</p>
Trigger Event	<p>Select the event that triggers the rule.</p> <p>When this event occurs on a record of the specified type, the rule is evaluated. After a rule is created, you cannot change the trigger event on the rule.</p> <p><b>NOTE:</b> The trigger events After Association With Parent and After Dissociation From Parent are supported only for the Account, Contact, and Opportunity record types. For more information, see the Association and Dissociation Trigger Events section of the <a href="#">About Workflow Rules</a> (on page 277) topic.</p>
Parent Record Type	<p>This field is displayed if you select the After Association With Parent trigger event or the After Dissociation From Parent trigger event.</p> <p>Select the parent record type. For example, if you are setting up a workflow rule that will be triggered when a contact record is associated with a parent account record, select Account in this field, and select Contact in the Record Type field.</p>

- 5** If you want to define a condition on the workflow rule, click the *fx* icon in the Workflow Rule Condition section of the page, and use Expression Builder to define the workflow rule condition. For more information about Expression Builder, see [Expression Builder](#) (on page 588).

**NOTE:** If you do not define any condition for the workflow rule, the actions on the rule will be performed each time the rule is triggered.

When creating conditions on workflow rules, note the following points:

- A workflow rule condition can contain a maximum of 1024 characters.
- You can configure workflow rules that are specific to particular roles or channels. For more information about restricting workflow rules to specific roles or channels, see [Restricting Workflow Rules to Specific Channels or Roles](#) (on page 293).
- You can determine if a field in a record has been updated by using a condition similar to the following in the workflow rule. In this example, the string used to determine if the field has changed is *Invalid*, but you can use any string you want, provided that the string does not exist as a value in the field that is being examined:

```
IsNull([<FieldName>], "Invalid") <> IfNull(PRE("<FieldName>"), "Invalid")
```

**CAUTION:** The PRE function does not return the previous value of a field if the function is used in any workflow or action that is invoked after a Wait action. For more information about the PRE() function, see [PRE](#) (on page 635).

- 6 If the Actions If Condition Is False section is available on the Workflow Rule Detail page, then you can specify that the save operation must be cancelled if the condition on the rule is not met.

For more information about specifying that the save operation must be cancelled if the condition on the rule is not met, see [Canceling Workflow Save Operations](#) (on page 291).

- 7 Save the workflow rule.

When you have saved the rule, you can create actions for the rule. You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule. For step-by-step procedures for creating workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)

### Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [Canceling Workflow Save Operations](#) (on page 291)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Changing the Order of Workflow Rules](#) (on page 311)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## Canceling Workflow Save Operations

For certain record types, on workflow rules where the trigger is Before Modified Record Saved, you can specify that the operation to save the changes that triggered the rule is to be canceled if the condition on the rule is not met. However, changes made by Oracle CRM On Demand are not canceled even if you specify that the save operation is to be canceled.

The Cancel Save option is available only on workflow rules where the trigger event is Before Modified Record Saved, and it is available for certain record types only. In addition, your user role determines which record types the Cancel Save option is available on, as follows:

- If your user role has the Manage Data Rules - Manage Workflow Rules privilege, the Cancel Save option is available on workflow rules for the Opportunity record type.
- If your user role has the Workflow Cancel Save privilege as well as the Manage Data Rules - Manage Workflow Rules privilege, the Cancel Save option is available on workflow rules for the following record types:
  - Account
  - Activity
  - Contact
  - Custom Object 01
  - Custom Object 02
  - Custom Objects 04 and higher
  - Household
  - Lead
  - Opportunity
  - Revenue
  - Service Request

### *To cancel a workflow save operation if the rule condition is not met*

- 1 In the Workflow Rule Detail page, in the Actions If Condition Is False section of the page, select the Cancel Save check box.
- 2 (Optional) Specify the error message that is to be displayed when the save operation is canceled because the rule condition is not met.
- 3 Save your changes.

The following table describes the options in the Actions If Condition Is False section of the Workflow Rule Detail page.

Field	Description
Cancel Save	If you select this check box, the following actions are performed if the rule condition is not met:

Field	Description
	<ul style="list-style-type: none"> <li>■ The workflow rule terminates.</li> <li>■ All subsequent workflow rules based on the same record type that have the Before Modified Record Saved trigger event also terminate.</li> <li>■ All previous changes to the state of the record, except changes made by Oracle CRM On Demand, are rolled back.</li> <li>■ The record returns to its original state. However, if Oracle CRM On Demand makes an update to the record, then the change overrides the Cancel Save action. For example, if the primary contact is removed from the related contacts, then Oracle CRM On Demand updates the primary contact information on the parent opportunity record. This update by Oracle CRM On Demand overrides any Cancel Save action on the opportunity record.</li> <li>■ Any subsequent workflow rules for the same record type that have the When Modified Record Saved trigger event are not triggered.</li> <li>■ A message is returned as follows: <ul style="list-style-type: none"> <li>■ If the rule is triggered by a user action, then a message is displayed to the user whose action triggered the rule.</li> <li>■ If the rule is invoked by a Web service, then a message is returned to the Web service as an error string.</li> </ul> <p>You can specify the message in the Display Message field.</p> <p>If this check box is deselected, then the save operation is not affected (and no message is returned) if the condition on the rule is not met.</p> <p>By default, the Cancel Save check box is deselected.</p> </li> </ul>
Display Message	<p>In this field, you can specify the message that is returned to the user or Web service if the condition on the rule is not met, and the Cancel Save check box is selected for the rule.</p> <p>If you do not specify a message in this field, then a default message is returned. The maximum number of characters that the message can contain is 1999.</p>

### Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [Creating Workflow Rules](#) (on page 288)

## Restricting Workflow Rules to Specific Channels or Roles

You can restrict a workflow rule to specific channels or roles by adding a condition to the workflow rule.

### *To prevent a channel from invoking a workflow rule*

- Use the `ExcludeChannel()` function in the condition expression.

For example, to prevent a large import operation from triggering a workflow rule, use the following condition in the workflow rule:

```
ExcludeChannel ("Import")
```

For more information about the `ExcludeChannel()` function, see [ExcludeChannel](#) (on page 605).

### *To restrict a workflow rule to a specific role*

- Use the `UserValue()` function with the `<Role>` attribute in the condition expression.

For example, to restrict a workflow rule so that it is invoked only when the role of the user whose action triggers the rule is Administrator and the Priority on the record is set to High, use the following condition in the workflow rule:

```
UserValue('<Role>')="Administrator" AND [<Priority>]="High"
```

For more information about the `UserValue()` function, see [UserValue](#) (on page 644).

## Creating Workflow Actions: Assign a Book

An Assign a Book action on a workflow rule automatically assigns a book to a record when the conditions on the workflow rule are met.

**NOTE:** You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Assign a Book action.

**Before you begin.** To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 210).

### *To create an Assign a Book action*

- 1 Navigate to the rule where you want to create the action:
  - a In the upper-right corner of any page, click the Admin global link.
  - b In the Business Process Management section, click Workflow Configuration.
  - c On the Workflow Rules List page, find the rule where you want to create the action.

For information about searching for workflow rules in the list page, see [Filtering Lists](#).

- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Assign a Book.  
**NOTE:** The trigger event on the workflow rule determines what types of actions can be created on the rule.  
**TIP:** You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
- 4 In the Workflow Action Edit page, enter a name for the action.
- 5 If you want to enable the action, select the Active check box.
- 6 Click the selector button beside the Book Name field.
- 7 In the Book lookup, select the book to which you want to assign records, and click OK.
- 8 Select the appropriate Assignment Option and Apply To option.  
For a description of the options, see [Assigning Records to Books](#) (on page 253).
- 9 Save the action.

### Record Ownership Modes and Assigning Books

You can configure record types that support custom books in different ownership modes: user mode, mixed mode, or book mode. For more information about records ownership modes, see [About Record Ownership Modes](#) (on page 223). The record ownership mode interacts with workflow rules and actions.

If an Assign a Book workflow action attempts to remove the primary custom book from a record, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in mixed mode, then Oracle CRM On Demand removes the value in the Book field on the record when the primary custom book is removed from the record.
- If the record type is configured in user mode, then none of the books on the record is a primary custom book, and the record ownership mode does not impact the workflow action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)

### Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)

- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## Creating Workflow Actions: Create Integration Event

A Create Integration Event action on a workflow rule automatically sends an integration event to one or more integration queues when the conditions on the workflow rule are met and a change is detected in at least one of the fields that are tracked by the Create Integration Event action.

### About Create Integration Event Actions and Wait Actions

If you want to use a Create Integration Event action to create an integration event that captures the changes made to a record by the event that triggers a workflow rule, then you must place the Create Integration Event action before any Wait action in the sequence of actions on the workflow rule. If a Wait action precedes a Create Integration Event action on a workflow rule, then the Wait action prevents the Create Integration Event action from detecting changes to the record. When the waiting period on the Wait action ends, the record is read again before the remaining actions on the rule are performed, and the values of the fields on the record before the event that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of a field are considered to be the same, and the Create Integration Event action does not create an integration event because it does not detect any change in the tracked fields.

**NOTE:** You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Create Integration Event action.

**Before you begin.** To perform the procedure described here, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 210).

#### *To create a Create Integration Event action*

- 1 Navigate to the rule where you want to create the action:
  - a In the upper-right corner of any page, click the Admin global link.
  - b In the Business Process Management section, click Workflow Configuration.
  - c On the Workflow Rules List page, find the rule where you want to create the action.  
For information about searching for workflow rules in the list page, see [Filtering Lists](#).
- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Create Integration Event.

**NOTE:** The trigger event on the workflow rule determines what types of actions can be created on the rule.

**TIP:** You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

- 4 In the Workflow Action Edit page, enter a name for the action.
  - 5 If you want to enable the action, select the Active check box.
  - 6 Select the integration queues to which the integration events will be written.
  - 7 Save the workflow action.
  - 8 From the record-level menu in the list of actions, select Configure for the integration event action that you want to configure.
- NOTE:** The Configure option is not available for actions where the trigger event is When Records Are Merged.
- 9 In the Configure Integration Event Tracking page, select the check boxes for the fields, as needed:
    - Select the Always Include check box if you want the field to be included in the integration event even if the value of the field has not been changed.
    - Select the Track Changes check box if you want an integration event to be generated each time this field is updated.
  - 10 Save your changes.

The following table describes the fields on the Configure Integration Event Tracking page.

Field	Description
Display Name	The name of the field as it is displayed in the user interface.
Integration Tag	The integration tag that is used when the field is included in the integration event
Required	This read-only check box indicates if the field has been set up as a required field.
Always Include	<p>Select this check box if you want the field to be included in the integration event even if the value of the field has not been changed.</p> <p><b>NOTE:</b> The Always Include check box is selected by default and cannot be deselected for certain fields used by Oracle CRM On Demand.</p>



Field	Description
Track Changes	<p>Select this check box if you want an integration event to be generated each time that this field is updated.</p> <p><b>NOTE:</b> The Track Changes check box is not available if the trigger event for the workflow rule is Before Record Is Deleted, After Association With Parent, or After Dissociation From Parent. Also, if the trigger event for the workflow rule is After Association With Parent, or After Dissociation From Parent, then the set of fields displayed on the page will be the set of fields at the child record level. You cannot configure the set of fields included in the integration event at the parent record level.</p>

For more information about integration events, see [About Integration Events](#) (on page 563).

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)

### Related Topics

See the following topics for related information about workflows:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)
- [About Integration Events](#) (on page 563)

## Creating Workflow Actions: Create Task

A Create Task action on a workflow rule creates a task automatically when the conditions on the workflow rule are met.

**NOTE:** You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

## About Configuring Workflow Rules to Create Follow-Up Tasks for Activities

The Create Task action is available for the Activity record type so that you can configure workflow rules to create follow-up tasks when new activity records are saved or existing activity records are updated, deleted, or restored. Follow-up tasks that are created for activity records do not trigger any subsequent workflow rules that are based on the Activity record type. For more information, see [Example of Configuring Workflow Rules to Create Follow-Up Tasks for Activities](#) (on page 301).

## Tasks Linked to Parent Records

If a workflow rule is based on a record type that supports child tasks, then when a Create Task action on the rule creates a task, the record that triggered the workflow rule becomes the parent record for the new child task record. In addition, activities created by workflow rule actions are automatically linked to other parent records as follows:

- When a Create Task action creates an activity for an opportunity record, the workflow action automatically links the activity to the parent account for the opportunity as well as to the opportunity record itself.
- When a Create Task action creates an activity for a service request record, the workflow action automatically links the activity to the parent account and the contact for the service request, as well as to the service request record itself.

If a workflow rule is based on a record type that does not support child tasks, then when a Create Task action on the rule creates a task, the task is not linked to any parent record.

The following procedure describes how to create a Create Task action.

**NOTE:** For a Create Task action to succeed, the user whose actions trigger the workflow rule must have the appropriate access rights to create a task.

**Before you begin.** To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 210).

### To create a Create Task action

- 1 Navigate to the rule where you want to create the action:
  - a In the upper-right corner of any page, click the Admin global link.
  - b In the Business Process Management section, click Workflow Configuration.
  - c On the Workflow Rules List page, find the rule where you want to create the action.  
For information about searching for workflow rules in the list page, see [Filtering Lists](#).
- 2 Click the Workflow Name link on the rule.

- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Create Task.

**NOTE:** The trigger event on the workflow rule determines what types of actions can be created on the rule.

**TIP:** You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

- 4 In the Workflow Action Edit page, enter a name for the action.

- 5 If you want to enable the action, select the Active check box.

- 6 Fill in the fields described in the following table, and then save the action.

**NOTE:** If you select the Relative User on Record option in the Owner field for the task, and the owner of the record is an inactive user, the task will not be created.

Field	Description
Owner	<p>Select the type of owner for the task (Relative User on Record or Specific User), and then select the owner:</p> <ul style="list-style-type: none"> <li>■ If you select Relative User on Record, select the user from the list.</li> </ul> <p>If you select a team role as the owner, the workflow rule creates a task for each user who has the assigned team role.</p> <p><b>NOTE:</b> For accounts, contacts, and opportunities, any custom team roles that are added to the record type are available for selection in the list of Relative User on Record owners. For more information on customizing records, see <a href="#">Record Type Application Customization Page</a> (on page 63).</p> <ul style="list-style-type: none"> <li>■ If you select Specific User, click the Lookup icon, and select the task owner.</li> </ul> <p><b>NOTE:</b> For information about how record ownership modes affect the ownership of automatically generated tasks, see <a href="#">Record Ownership Modes and Automatically Generated Tasks</a> (on page 227).</p>
Type	Select the activity type from the drop-down list.
Due Date	<p>Enter an expression that evaluates to the due date for the task. You can use Expression Builder to create the expression. Click the fx icon beside the field to open the Expression Builder window. The expression can contain a maximum of 1024 characters.</p> <p><b>NOTE:</b> For the workflow action to work correctly, the Due Date field must contain an expression that evaluates to a valid date. Do not enter anything else, such as a date or an integer, in the Due Date field.</p> <p>If the expression that you enter evaluates to a date that is</p>

Field	Description
	<p>before or the same as the current date, then the due date is the current date by default.</p> <p>The due date can be set to a maximum of 2400 days in the future. If the expression evaluates to more than 2400 days in the future, then the due date is set to 2400 days in the future. For example, if the expression contains Today()+3000, then the result is calculated as Today()+2400.</p> <p>If the expression evaluates to an invalid date or to any other data type, such as string, integer, or Boolean, then an error occurs, and the activity is not created.</p> <p>You can use the Check Syntax button in Expression Builder to test the syntax of the expression. However, Expression Builder does not verify that the expression evaluates to a valid date.</p> <p>For information about using Oracle On Demand Expression Builder, see <a href="#">Expression Builder</a> (on page 588).</p>
Priority	Select the activity priority from the drop-down list.
Status	Select the activity status from the drop-down list.
Task Currency	Select a currency.
Private	Select this check box if you want the task to be visible only to the task owner.
Subject	<p>Enter the subject line for the task.</p> <p>You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string.</p> <p>For example, the text might include the following:</p> <pre>Call %%%[&lt;ContactLastName&gt;]%%%</pre> <p>If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added. If you use Expression Builder to embed a complex expression, the percent signs might not be added at the appropriate places. In that case, ensure that the percent signs are placed before and after the entire expression so that the expression is evaluated correctly.</p> <p>For example, %%%Today() + 30%%% adds 30 days to the current date, but %%%Today() %%%+ 30 concatenates 30 to the string representation of the current date.</p> <p>To use Expression Builder to embed functions and field names in the field, click the <i>fx</i> icon beside the field.</p> <p>If you are entering only static text, you do not need to use</p>

Field	Description
	<p>Expression Builder.</p> <p>This field can contain a maximum of 1024 characters, including the percent signs before and after the expressions.</p>
Description	<p>Enter the description of the task.</p> <p>You can embed functions and field names in the text, as described for the Subject field.</p> <p>This field can contain a maximum of 1024 characters, including the percent signs before and after the expressions.</p>

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)

### Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## Example of Configuring Workflow Rules to Create Follow-Up Tasks for Activities

This topic provides an example of configuring workflow rules to create follow-up tasks when activity records are created. You might use this functionality differently, depending on your business model.

You want a follow-up task to be created automatically each time a user creates a new activity. The follow-up task is to be set up as follows:

- The task is a call.
- The due date for the follow-up task is two days after the original task is created.
- The priority of the follow-up task is set to 1-High.

- The owner of the follow-up task is the same as the owner of the original activity.

### ***To configure a workflow rule to create a follow-up task for a new activity***

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click Workflow Configuration.
- 3** In the Workflow Rules List page, click New on the title bar.
- 4** In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the rule information, as follows:
  - a** In the Workflow Name field, enter a name for the workflow rule.
  - b** Select the Active check box.
  - c** In the Record Type field, select Activity.
  - d** In the Trigger Event field, select When New Record Saved.
- 5** Save the workflow rule.
- 6** In the Workflow Rule Details page, in the Actions title bar, click Menu, and then select Create Task.
- 7** In the Workflow Action Edit page, fill in the action information, as follows:
  - a** In the Action Name field, enter a name for the action.
  - b** Select the Active check box.
  - c** In the Owner field, select Relative User on Record, then select Activity Owner.
  - d** In the Type field, select Call.
  - e** In the Due Date field, click the fx icon, enter the following expression in the Expression field in the Expression Builder window, and then save the expression:  
Today()+2
  - f** In the Priority field, select 1-High.
  - g** In the Subject field, enter the subject line for the task, for example, *Follow-Up Call for New Activity*.
- 8** Save the workflow action.

## **Creating Workflow Actions: Send Email**

A Send Email action on a workflow rule automatically sends email when the conditions on the workflow rule are met.

**NOTE:** You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

## About the From Address in Emails Sent by Workflow Actions

When you specify the From address for the emails that are sent by a Send Email workflow action, you can select one of the following options:

### ■ Default Email Address

If you select this option, then the From address in the email is donotreply@crmondemand.com and the Sender field in the email is set to support@crmondemand.com. If the email recipient attempts to respond to the email, then the address in the To field in the reply is automatically set to support@crmondemand.com.

**NOTE:** Starting with Release 20 of Oracle CRM On Demand, the default From address in the emails that are sent by Send Email workflow actions is donotreply@crmondemand.com. In releases of Oracle CRM On Demand earlier than Release 20, the default From address was support@crmondemand.com.

### ■ Current User

If you select this option, then the email is sent on behalf of the signed-in user who triggers the workflow. The From address in the email is donotreply@crmondemand.com, and the Sender field in the email is set to the email address of the user. If the email recipient responds to the email, then the address in the To field in the reply is automatically set to the email address of the signed-in user who triggers the workflow rule.

### ■ Specific Email Address

If you select this option, then the email is sent on behalf of the email address that you specify on the workflow action. The From address in the email is donotreply@crmondemand.com, and the Sender field in the email is set to the email address that you specified. If the email recipient responds to the email, then the address in the To field in the reply is automatically set to the specific email address that you specified on the workflow action.

**NOTE:** Oracle CRM On Demand appends a string to each workflow email so that the email can be tracked in the email delivery system at Oracle.

The following procedure describes how to create a Send Email action.

**NOTE:** The workflow functionality in Oracle CRM On Demand is not intended for use as a tool for mass email sending. If you have a requirement to send a lot of email to your customers, then it is recommended that you use a product such as Oracle CRM On Demand Marketing to fulfill your requirements.

**Before you begin.** To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 210).

### *To create a Send Email action*

- 1 Navigate to the rule where you want to create the action:
  - a In the upper-right corner of any page, click the Admin global link.
  - b In the Business Process Management section, click Workflow Configuration.
  - c On the Workflow Rules List page, find the rule where you want to create the action.

For information about searching for workflow rules in the list page, see [Filtering Lists](#).

2 Click the Workflow Name link on the rule.

3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Send Email.

**NOTE:** The trigger event on the workflow rule determines what types of actions can be created on the rule.

**TIP:** You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

4 In the Workflow Action Edit page, enter a name for the action.

5 If you want to enable the action, select the Active check box.

6 In the From field, select or enter the address that the email is to be sent from, as follows:

- Select the Default Email Address option to send the email from the default address.
- Select the Current User option to send the email on behalf of the signed-in user who triggers the workflow.
- Select the Specific Email Address option to send the email on behalf of a specific address, and then specify the address.

When entering the address, the following restrictions apply:

- You can enter the email address directly, or click the *fx* icon beside the field, and use Expression Builder to define the email address.
- Specify only one email address. Multiple addresses are not supported in the From field.
- If you specify an absolute email address, you must enclose the address in single or double quotation marks.
- Expression Builder checks only the syntax of the address expressions. It does not check that the address is valid.
- This field can contain a maximum of 1024 characters.

7 In the To field, select or enter the email address of the email recipient, as follows:

- Select Specific User or Relative User on Record, and then select the recipient, as follows:
  - If you select Specific User, click the Lookup icon, and select the user.
  - If you select Relative User on Record, select the recipient from the list.

If you select a team role as the recipient, the workflow rule sends the mail to each user who has the assigned team role.

**NOTE:** For accounts, contacts, and opportunities, any custom roles that are added to the record type are available in the list of Relative User on Record recipients. For more information on customizing records, see [Record Type Application Customization Page](#) (on page 63).

- Select the Specific Email Address option, and then specify the addresses.

When entering the addresses, the following restrictions apply:

- You can enter email addresses directly, or click the *fx* icon beside the field, and use Expression Builder to define email addresses.



- To enter multiple addresses, use a semi-colon (;) delimiter.
- You must enclose absolute email addresses in single or double quotation marks.
- Expression Builder checks only the syntax of the address expressions. It does not check that the addresses are valid.
- This field can contain a maximum of 1024 characters.

The following example shows an entry with multiple addresses:

```
PRE('<EmailField1>') + ";" + [<EmailField1>] + ";" + "john.doe@company.com"
```

## 8 Enter the subject line for the email.

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

For example, the text might include the following:

```
A new %%%[<AccountType>]%%% account has been created
```

If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added. If you use Expression Builder to embed a complex expression, the percent signs might not be added at the appropriate places. In that case, ensure that the percent signs are placed before and after the entire expression so that the expression is evaluated correctly.

For example, %%%Today() + 30%%% adds 30 days to the current date, but %%%Today() %%%+ 30 concatenates 30 to the string representation of the current date.

To use Expression Builder to embed functions and field names in the field, click the *fx* icon beside the field. If you are entering only static text, you do not need to use Expression Builder.

This field can contain a maximum of 1024 characters, including the percent signs before and after the functions and field names.

## 9 Enter the message for the email.

You can embed functions and field names in the text, as described in Step 3.

For example, the text might include the following:

```
Hello Mr %%%[<ContactLastName>]%%%,
```

This field can contain a maximum of 2000 characters, including the percent signs before and after the expressions.

## 10 Save the action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)

### Related Topics

See the following topics for related information about workflows:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## Creating Workflow Actions: Update Values

An Update Values action on a workflow rule automatically updates fields when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what data was changed). The action is performed at the end of the wait period defined in one or more Wait actions, if any, that precede the Update Values action on the workflow rule.

Unless the trigger event for the workflow rule is Before Modified Record Saved, there must be at least one active Wait action that precedes the Update Values action on the workflow rule. Except on workflow rules where the trigger event is Before Modified Record Saved, Oracle CRM On Demand allows you to activate an Update Values action only if the action is preceded by an active Wait action.

**NOTE:** You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Update Values action.

**Before you begin.** To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 210).

### *To create an Update Values action*

- 1 Navigate to the rule where you want to create the action:
  - a In the upper-right corner of any page, click the Admin global link.
  - b In the Business Process Management section, click Workflow Configuration.
  - c On the Workflow Rules List page, find the rule where you want to create the action.  
For information about searching for workflow rules in the list page, see [Filtering Lists](#).
- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Update Values.

**NOTE:** The trigger event on the workflow rule determines what types of actions can be created on the rule.

**TIP:** You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

- 4 In the Workflow Action Edit page, enter a name for the action.
- 5 If you want to enable the action, select the Active check box.
- 6 Fill in the fields described in the following table, and then save the action.

Field	Description
Field Name	Select the name of the field that is to be updated from the drop-down list.
Value	<p>Click the <i>fx</i> icon beside the field, and define the expression that calculates the new value for the field. You can use the Check Syntax button in Expression Builder to test the syntax.</p> <p>This field can contain a maximum of 1024 characters.</p> <p>If you define an expression to calculate a field, such as a custom Margin field, where Margin equals Revenue minus Cost, then the field value is calculated each time the workflow rule is triggered, even if the Revenue or the Cost has not changed. For better performance, you can define an additional condition on the workflow rule, such as:</p> <pre>FieldValue('&lt;Revenue&gt;') &lt;&gt; PRE('&lt;Revenue&gt;') OR FieldValue('&lt;Cost&gt;') &lt;&gt; PRE('&lt;Cost&gt;')</pre> <p>The PRE function returns the value that was in the field before the field was updated.</p>
Overwrite Existing Values	<p>Select this check box if the existing value in the field is to be overwritten with the new value.</p> <p>If the field already contains a value, the value is not updated unless this check box is selected.</p> <p>If the field is empty, the field is updated with the new value, even if this check box is deselected.</p>

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Wait](#) (on page 308)

### Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)

- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## Creating Workflow Actions: Wait

A Wait action on a workflow rule allows you to delay the execution of other (following) actions on a workflow rule until a period has passed, or a certain date and time have been reached.

### About Wait Actions and Create Integration Event Actions

If you want to use a Create Integration Event action to create an integration event that captures the changes made to a record by the event that triggers a workflow rule, then you must place the Create Integration Event action before any Wait action in the sequence of actions on the workflow rule. If a Wait action precedes a Create Integration Event action on a workflow rule, then the Wait action prevents the Create Integration Event action from detecting changes to the record. When the waiting period on the Wait action ends, the record is read again before the remaining actions on the rule are performed, and the values of the fields on the record before the event that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of a field are considered to be the same, and the Create Integration Event action does not create an integration event because it does not detect any change in the tracked fields.

**NOTE:** You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Wait action.

**Before you begin.** To perform the following procedure, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 210).

#### *To create a Wait action*

- 1 Navigate to the rule where you want to create the action:
  - a In the upper-right corner of any page, click the Admin global link.
  - b In the Business Process Management section, click Workflow Configuration.
  - c On the Workflow Rules List page, find the rule where you want to create the action.

For information about searching for workflow rules in the list page, see [Filtering Lists](#).

- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Wait.

**NOTE:** The trigger event on the workflow rule determines what types of actions can be created on the rule.

**TIP:** You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

- 4 In the Workflow Action Edit page, enter a name for the action.
- 5 If you want to enable the action, select the Active check box.
- 6 If you do not want Oracle CRM On Demand to reevaluate the rule conditions after the wait period ends, deselect the Reevaluate Rule Conditions After Wait check box.

**NOTE:** For more information about the Reevaluate Rule Conditions After Wait check box, see [About Time-Based Workflow Rules](#) (on page 286).

- 7 Specify the duration of the wait, using one of the following options:
  - Select the Period option, and then enter the period for the delay in years, months, days, hours, and minutes, as follows:
    - In the Years field, enter a positive integer value between 0 (zero) and 5.
    - In the Months field, enter a positive integer value between 0 (zero) and 12.
    - In the Days field, enter a positive integer value between 0 (zero) and 200.
    - In the Hours field, enter a positive integer value between 0 (zero) and 200.
    - In the Minutes field, enter a positive integer value between 0 (zero) and 59.

You cannot specify a negative value or a noninteger value such as 1.5.

- Select the Period Expression option, then click the *fx* icon beside the field, and use Expression Builder to create an expression to calculate the period for the delay.

You can use the Duration function in Expression Builder to calculate a period in days or fractions of days. For more information, see [Duration](#) (on page 603).

The expression must evaluate to a number. The following are examples of valid expressions to calculate the period for a delay:

```
Duration('P0YT1H') + Duration('P0YT1M') + Duration('P1Y')
```

```
Duration('P0YT1H') + 1
```

```
Duration('P1YT1H') - 1
```

The maximum supported duration is 'P5Y12M200DT200H59M'; that is, 5 years, 12 months, 200 days, 200 hours, and 59 minutes.

**NOTE:** If the calculated wait period is negative, the wait period is set to zero, and the Wait action completes immediately. Any remaining actions on the workflow rule are executed without delay.

- Select the Time option, click the calendar icon, and select the end date and time for the delay.  
Select the time according to the time zone specified in your personal settings.
- Select the Time Expression option, then click the *fx* icon beside the field, and use Expression Builder to create an expression to calculate the end date and time for the delay.

You can use the Duration function in Expression Builder to calculate a period in days or fractions of days. For more information, see [Duration](#) (on page 603).

The expression must evaluate to a date and time. The following are examples of valid expressions to calculate the end date and time for a delay:

`Timestamp() + Duration('P0YT5M')`

`Today() + Duration('P0YT1H5M')`

**NOTE:** If the calculated end date and time has already passed, the wait period on the action is set to 0 (zero) and the Wait action completes immediately. Any remaining actions on the workflow rule are executed without delay.

If the expression does not evaluate to a valid date and time, the Wait action completes immediately, and any remaining actions on the workflow rule are executed without delay.

If the expression evaluates to a date and time that is more than 5 years, 12 months, 200 days, 200 hours, and 59 minutes (that is, the maximum supported wait duration) after the trigger date and time, the end date and time are calculated as the trigger date and time plus the maximum supported wait duration.

### 8 Save the action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)

### Related Topics

See the following topics for related information about workflows:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Deactivating Workflow Rules and Actions](#) (on page 312)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## Changing the Order of Workflow Rule Actions

If there is more than one action on a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule.

### *To change the order of the actions on a workflow rule*

- 1 In the upper-right corner of any page, click the Admin global link.

- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule where you want to change the order of the actions.  
For information about searching for workflow rules in the list page, see Filtering Lists.
- 4 Click the Workflow Name link on the rule.
- 5 In the Actions title bar on the Workflow Rule Detail page, click the Edit Order button.
- 6 On the Edit Action Order page, use the directional arrows to change the order of the actions.  
**NOTE:** If there is an Update Values action on the rule, then it must be preceded by at least one active Wait action on the rule unless the trigger event for the workflow rule is Before Modified Record Saved.
- 7 Click Save to save your changes.

### Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Creating Workflow Actions: Assign a Book](#) (on page 293)
- [Creating Workflow Actions: Create Integration Event](#) (on page 295)
- [Creating Workflow Actions: Create Task](#) (on page 298)
- [Creating Workflow Actions: Send Email](#) (on page 302)
- [Creating Workflow Actions: Update Values](#) (on page 306)
- [Creating Workflow Actions: Wait](#) (on page 308)

## Changing the Order of Workflow Rules

When you create a workflow rule, Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules that are based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for rules that are based on the same record type, the same trigger event, and the same parent record type. The order number determines the order in which Oracle CRM On Demand invokes a sequence of workflow rules that are based on the same record type and the same trigger event, and if applicable, on the same parent record type. You can change the order of your rules.

For example, if you create a workflow rule based on the Account record type, with the trigger event, Before Record Is Deleted, and two workflow rules already have the same record type and trigger event, then your new rule is assigned order number 3. You can later change the order number, so that your new rule is the first rule invoked for the specified record type and trigger event.

The following procedure describes how to change the order of a workflow rule.

### ***To change the order of workflow rules***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule whose order you want to change, and click the name link on the rule.

For information about searching for workflow rules in the list page, see [Filtering Lists](#).

- 4 On the Workflow Rule Detail page, click Edit Order.
- 5 In the Edit Workflow Order page, click the arrows to change the order of the rule.
- 6 Click Save to save your changes.

**NOTE:** If you delete a workflow rule, the other rules based on the same record type and the same trigger event are automatically reordered. However, if you make a workflow rule inactive, its order within the list of rules based on the same record type and the same trigger event does not change (but the rule is not invoked).

### **Related Topics**

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)

## **Deactivating Workflow Rules and Actions**

If you deactivate a workflow rule while an instance of a Wait action on the rule is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

If you deactivate a Wait action on a workflow rule while an instance of the Wait action is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

The following procedure describes how to deactivate a workflow rule.



***To deactivate a workflow rule***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule that you want to deactivate.  
For information about searching for workflow rules in the List page, see Filtering Lists.
- 4 In the record-level menu for the rule, select Edit.
- 5 In the Workflow Rule Detail page, deselect the Active check box.
- 6 Save your changes.

The following procedure describes how to deactivate a workflow rule action.

***To deactivate a workflow rule action***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Configuration.
- 3 On the Workflow Rules List page, find the rule from which you want to delete the action.  
For information about searching for workflow rules in the List page, see Filtering Lists.
- 4 Click the Workflow Name link for the rule.
- 5 In the Workflow Rule Detail page, in the Actions section, find the action that you want to delete.
- 6 In the record-level menu for the action, select Edit.
- 7 In the Workflow Action Edit page, deselect the Active check box.

**NOTE:** If there is an Update Values action on the rule, then the action must be preceded by at least one active Wait action on the rule, unless the trigger event for the workflow rule is Before Modified Record Saved. If you attempt to deactivate a Wait action, and if no other Wait action precedes the Update Values action, then Oracle CRM On Demand does not allow you to deactivate the Wait action.

- 8 Save your changes.

**Related Topics**

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)

- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Changing the Order of Workflow Rules](#) (on page 311)
- [Deleting Workflow Rules and Actions](#) (on page 314)

## Deleting Workflow Rules and Actions

When you delete a workflow rule, all actions on the rule are also deleted. Also, the order numbers on the remaining rules for the relevant record type are automatically updated as necessary to ensure that there is no gap in the sequence of the numbers.

If you delete a workflow rule while an instance of a Wait action on the rule is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

When you delete an action from a workflow rule, the order numbers on the remaining actions on the rule are automatically updated as necessary to ensure that there is no gap in the sequence of the numbers.

If you delete a Wait action from a workflow rule while an instance of the Wait action is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

The following procedure describes how to delete a workflow rule.

### ***To delete a workflow rule***

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click Workflow Configuration.
- 3** On the Workflow Rules List page, find the rule that you want to delete.  
For information about searching for workflow rules in the List page, see [Filtering Lists](#).
- 4** In the record-level menu for the rule, select Delete.
- 5** Confirm that you want to delete the rule.

The following procedure describes how to delete a workflow rule action.

### ***To delete a workflow rule action***

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click Workflow Configuration.
- 3** On the Workflow Rules List page, find the rule from which you want to delete the action.  
For information about searching for workflow rules in the List page, see [Filtering Lists](#).

- 4 Click the Workflow Name link for the rule.
- 5 In the Workflow Rule Details page, in the Actions section, find the action that you want to delete.
- 6 In the record-level menu for the action, select Delete.

**NOTE:** If the rule has an Update Values action, then the action must be preceded by at least one active Wait action for the rule unless the trigger event for the workflow rule is Before Modified Record Saved. If you attempt to delete a Wait action, and if there is no other Wait action preceding the Update Values action, then Oracle CRM On Demand does not allow you to delete the Wait action.

- 7 Confirm that you want to delete the action.

### Related Topics

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 277)
- [About Workflow Actions](#) (on page 284)
- [About Time-Based Workflow Rules](#) (on page 286)
- [Creating Workflow Rules](#) (on page 288)
- [Changing the Order of Workflow Rule Actions](#) (on page 310)
- [Changing the Order of Workflow Rules](#) (on page 311)
- [Deactivating Workflow Rules and Actions](#) (on page 312)

## Workflow Monitor

You can use the Workflow Monitor to view instances of workflow Wait actions that are in a pending state, and instances of workflow actions that terminated unexpectedly after a wait period on a Wait action ended.

The Workflow Monitor page shows two lists:

- A list of pending instances
- A list of error instances

### Pending Instances

From the Workflow Monitor, you can view details of pending instances and details of the workflow actions. For example, if an instance of a workflow Wait action is pending for longer than you expect, you can use the Workflow Monitor to investigate the instance and look at the configuration of the workflow action, and if necessary, you can delete the instance.

**NOTE:** When you delete a pending instance of a Wait action, none of the remaining actions on the workflow rule are performed.

For example, you might configure a workflow rule with the following intended sequence of actions:

- 1 A Wait action with a duration of 24 hours

- 2 A Send Email action
- 3 A Wait action with a duration of 48 hours
- 4 A Send Email action
- 5 A Create Task action

If the actions are correctly configured, the first Wait action in the sequence, action 1, remains in the Pending state for 24 hours. When the wait period ends, the Send Email action (action 2) is performed. The second Wait action (action 3 on the workflow rule) is next in the sequence. It remains in the Pending state for 48 hours. When the wait period ends, the Send Email action (action 4) and the Create Task action (action 5) are performed.

However, if the wait period on action 3 was incorrectly specified as 48 days rather than 48 hours, the action remains in the pending state until 48 days have passed. You can see the action in the pending list on the Workflow Monitor, and you can view the action details to see if the wait period is incorrectly specified. You can then delete the Wait action instance.

When you delete the Wait action instance, the workflow rule instance is terminated, and the remaining actions on the rule instance are not performed. In the previous example:

- If you delete action 1 while it is pending, actions 2, 3, 4, and 5 are not performed.
- If you delete action 3 while it is pending, actions 4 and 5 are not performed.

**NOTE:** Wait actions are the only type of workflow actions that are held in the Pending state.

## Error Instances

You can also use the Workflow Monitor to view details of some failed workflow instances. Failed instances of workflow actions are recorded on the Workflow Monitor only in the case where the action fails after the end of the wait period on a Wait action on the workflow rule.

In all other cases, when a workflow instance fails, the failure is reported immediately to the user whose actions triggered the workflow rule. The failure is reported in an onscreen error message or in the log file. Error messages for failed actions on workflow rules that are triggered by a Web service are reported in the response to the Web service.

As an example, you might configure a workflow rule with the following sequence of actions:

- 1 A Send Email action
- 2 A Create Task action
- 3 A Wait action
- 4 A Send Email action

If action 1 or action 2 terminates because of an error, the failure is reported in an error message on the screen or in the log file. If action 3 fails before the wait period starts, the failure is also reported in an error message on the screen or in the log file. If action 3 fails after the wait period ends, or if action 4 fails, the failure of the action is recorded in the Workflow Monitor. An error message is also written to the log file if the workflow rule was triggered by a Web service, but no message is displayed on the screen in the case where the workflow rule was triggered by a user action.

Details of workflow action instances that fail after the end of the wait period on a Wait action are retained in the error instances list of the Workflow Monitor for three months or until you delete them, whichever comes first. You can view details of the instances that terminated and details of the workflow actions.

For information about using the Workflow Monitor, see the following topics:

- [Viewing Workflow Instances](#) (on page 317)
- [Deleting Instances from the Workflow Monitor](#) (on page 319)
- [Workflow Instance Fields](#) (on page 320)

### Related Topics

See the following topic for related information about workflow rules:

- [Workflow Configuration](#) (on page 276)

## Viewing Workflow Instances

You can use the Workflow Monitor to view instances of workflow Wait actions that are in a pending state, and if necessary, you can delete a pending action to terminate the workflow rule instance.

You can also view information about instances of workflow actions that terminated unexpectedly after the end of the wait period on a Wait action. For information about what is recorded and displayed on the Workflow Monitor, see [Workflow Monitor](#) (on page 315) and [Workflow Instance Fields](#) (on page 320).

**Before you begin:** To use the Workflow Monitor, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

The following procedure describes how to view workflow instances in the pending or error state.

### *To view workflow instances in the pending or error state*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Workflow Monitor.
- 3 On the Workflow Monitor page, if the instance you want to view is not displayed in the Pending Instances list or the Error Instances list, click Show All in the appropriate list.
- 4 In the Pending Instances List page or the Error Instances List page, filter the list to find the instance you want, as follows:
  - a Click a letter in the Alpha bar to show only workflow instances where the workflow name begins with that letter.
  - b Type characters in the text field, and click Go to find workflow instances where the workflow name begins with those characters.
  - c Click a column header to sort records based on the values in that column. An arrow next to the column header indicates which column the sort is based on, and whether it is sorted in ascending or descending order. By default, records are searched using the left-most column as the search key.

- 5 To view details of an instance, click the Instance ID link.
- 6 To view details of the workflow action of which the record is an instance, click the Workflow Action link.

## Creating Lists of Pending Workflow Instances

You can create lists of pending workflow instances based on filters you define.

**NOTE:** You cannot create filtered lists of error instances (that is, instances that terminated unexpectedly due to an error).

The following procedure describes how to create lists of pending workflow instances that are based on filters you define.

### *To create a filtered list of pending workflow instances*

- In the Pending Instances List page, click Menu in the title bar, and select Create New List.

For more information about creating and refining lists, see [Creating and Refining Lists](#).

The following procedure describes how to manage filtered lists of pending workflow instances.

### *To manage lists of pending workflow instances*

- In the Pending Instances List page, click Menu in the title bar, and select Manage Lists Page.

For more information about managing lists, see [Manage Lists Page](#).

The following procedure describes how to view the filter for a list of pending workflow instances.

### *To view details of the filter on a list of pending workflow instances*

- In the Pending Instances List page, click Menu in the title bar, and select Show List Filter.

For more information about list filters, see [View List Page](#).

For more information about using the Workflow Monitor, see the following:

- [Workflow Monitor](#) (on page 315)
- [Deleting Instances from the Workflow Monitor](#) (on page 319)
- [Workflow Instance Fields](#) (on page 320)

## Related Topics

See the following topic for related information about workflow rules:

- [Workflow Configuration](#) (on page 276)

## Deleting Instances from the Workflow Monitor

You can delete instances of workflow actions from the Workflow Monitor one at a time. You can also delete multiple pending instances at the same time, by creating a filtered list of the instances and using the batch delete facility. The batch delete facility is not available for error instances.

Workflow error instances are retained in the error instances list of the Workflow Monitor for three months or until you delete them, whichever comes first.

For information about what is recorded and displayed on the Workflow Monitor, see [Workflow Monitor](#) (on page 315) and [Workflow Instance Fields](#) (on page 320)

**NOTE:** When you delete a pending instance of a Wait action from the workflow monitor, the workflow rule instance is terminated, and none of the remaining actions on the workflow rule are performed.

**Before you begin:** To use the Workflow Monitor, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

The following procedure describes how to delete an instance from the Workflow Monitor.

### *To delete an instance from the Workflow Monitor*

- 1 On the Workflow Monitor page, if the instance you want to view is not displayed in the Error Instances list or the Pending Instances list, click Show All in the appropriate list.
- 2 In the Error Instances List page or the Pending Instances List page, filter the list to find the instance you want, as follows:
  - a Click a letter in the Alpha bar to show only workflow instances where the workflow name begins with that letter.
  - b Type characters in the text field, and click Go to find workflow instances where the workflow name begins with those characters.
  - c Click a column header to sort records based on the values in that column. An arrow next to the column header indicates which column the sort is based on, and whether it is sorted in ascending or descending order. By default, records are searched using the left-most column as the search key.
- 3 Click Delete for the instance you want to delete.

The following procedure describes how to delete a list of pending instances from the Workflow Monitor.

### *To delete a list of pending instances*

- 1 If you have not already done so, create the list of pending instances that you want to delete.  
For more information, see [Viewing Pending and Error Workflow Instances](#).
- 2 In the Pending Instances List page, click Menu and select Batch Delete.
- 3 Click OK to confirm that you want to proceed.
- 4 On the Batch Delete Queue page, click Proceed in the Active Requests section.

**NOTE:** If you do not click **Proceed**, the records are not deleted.

**TIP:** You can return to the **Batch Delete Queue** page at any time by clicking the **Admin** global link, and then clicking **Batch Delete Queue** on the **Admin Homepage**.

- 5 To review the log file for the delete operation, in the **Batch Delete Queue** page, click **Log** in the **Processed Requests** section.

For more information about using the **Workflow Monitor**, see:

- [Workflow Monitor](#) (on page 315)
- [Viewing Workflow Instances](#) (on page 317)
- [Workflow Instance Fields](#) (on page 320)

### Related Topics

See the following topic for related information about workflow rules:

- [Workflow Configuration](#) (on page 276)

## Workflow Instance Fields

The following table describes the fields that you can view for workflow instances in the pending or error state in the **Workflow Monitor**.

Field	Description
Instance ID	The ID that Oracle CRM On Demand generates for this workflow instance.
Workflow Name	The name of the workflow rule where the workflow action is configured.
Record Type	The record type for the workflow rule.
Trigger Event	The event that triggers the workflow rule.
Workflow Action	The name of the workflow action of which this is an instance.
Error Message	For workflow instances in the error state, this field shows the reason why this instance of the workflow action terminated.
Initiated By	The name of the user whose action triggered this instance of the workflow rule.
Initiated On	The date and time when this instance of the workflow rule was triggered.
Resumes On	For workflow instances in the pending state, this field shows the date and time that the wait period for this instance of the workflow action will end.



Field	Description
Terminated On	For workflow error instances, this field shows the date and time that this instance of the workflow action terminated.

For more information about using the Workflow Monitor, see:

- [Workflow Monitor](#) (on page 315)
- [Viewing Workflow Instances](#) (on page 317)
- [Deleting Instances from the Workflow Monitor](#) (on page 319)

### Related Topics

See the following topic for related information about workflow rules:

- [Workflow Configuration](#) (on page 276)

## Data Rules and Assignment

Click a topic to see step-by-step instructions for procedures for setting up assignment rules (to assign records automatically), forecast definitions, lead conversion layouts and mappings, sales methodologies, and industries:

- [Setting Up Assignment Rules](#) (on page 326)
- [Mapping Additional Fields During Lead Conversion](#) (on page 333)
- [Creating Lead Conversion Layouts](#) (on page 333)
- [Setting Up the Forecast Definition](#) (on page 336)
- [Updating the Forecast Definition](#) (on page 342)
- [Setting Up Sales Processes, Categories, and Coaches](#) (on page 343)
- [Customizing Your Company's Industry List](#) (on page 350)

### Related Topics

See the following topics for related information:

- [About Assignment Rules](#) (on page 321)
- [Lead Conversion Administration](#) (on page 331)

## About Assignment Rules

**Before you begin.** To set up the assignment rules, your role must include the Data Rules and Assignment privilege.

Assignment rules allow you to automatically assign a lead, an opportunity, a service request, or an account to the appropriate person, team, and territory, based on the rules (called rule groups) that you set up.

If your company has selected the group assignment option, all group members share the records you assign to a member of that group. For more information, see [Group Management](#) (on page 257).

Depending on your company's structure and business processes, assignment rules can be simple. For example:

- Sales leads for each geographic region are assigned to the regional sales manager.
- New service requests are assigned to the technical service manager.

Or, the rules can be more complex. For example:

- Most leads are assigned by product expertise and geographic location, but some are assigned to a telemarketing manager.
- Most service requests are assigned by problem area, but all requests involving a particular product are routed to one person.

The following table describes how you can assign record types:

This record type	Has these assignment options
Accounts	You can assign the records to an employee or territory. Additionally, you can specify teams that share ownership of the newly assigned accounts.
Leads	You can assign the records to an employee.
Opportunities	You can assign the records to an employee or a territory. Additionally, you can specify teams that share ownership of the newly assigned opportunities.
Service Requests	You can assign the records to an employee.

The assignment rules in the active rule group are evaluated when the following occurs in relation to a record type:

- For leads: The Reassign Owner check box is selected.
- For service requests:
  - The service request is created without an owner or the owner is deleted from the record (that is, the Owner field is blank).
  - The Reassign Owner check box is selected.
- For accounts: The Reassign Owner check box is selected.
- For opportunities: The Reassign Owner check box is selected.

## Email Notifications

When a lead or service request is assigned an owner, an email is sent to the new owner. The template that is used for the email is determined by the language that is selected in the Personal Detail page of the new owner. For example, if the user wants to receive the notification emails in Spanish, then Spanish must be selected in the Language field on the user's Personal Detail page. You can turn off email notification for service requests on a rule basis by deselecting the Send Email Notification check box (flag) on the Service Request Assignment Rule Edit page. For information about updating assignment rules, see [Setting Up Assignment Rules](#) (on page 326).

In the email notifications, the From address is always donotreply@crmondemand.com and the Sender field is set to the address that you specify in the Return E-mail field on the assignment rule group. Oracle CRM On Demand appends a string to each email so that the email can be tracked in the email delivery system at Oracle. If an email recipient responds to an email notification, then the To field in the reply is set to the address that you specify in the Return E-mail field on the assignment rule group.

## Tracking the Reassignment Process

You can use three fields to help you to track the owner reassignment process, or to run analyses to determine how long the reassignment process takes. You can add these fields to Account, Opportunity, Lead, and Service Request page layouts. The fields are:

### ■ Assignment Status

The status can be Queued (the record is in the queue to be processed by assignment manager), or Processing (the record is currently being processed by assignment manager), or blank (the record is neither in the queue or being processed).

### ■ Last Assignment Submission Date

If the record is queued for processing or is currently being processed by assignment manager, this field shows the date and time the record was saved with the Reassign Owner check box selected. However, in the case of a service request record, this field shows the date and time the record was saved with the Owner field blank.

### ■ Last Assignment Completion Date

If a record has never been reassigned, this field is blank; otherwise, the field shows the date and time the record was last reassigned.

For more information on adding fields to page layouts, see [Customizing Static Page Layouts](#) (on page 89).

## Making Rule Groups Active

You can create multiple assignment rule groups, but only one rule group can be active at a time for each record type.

**CAUTION:** The rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you create a new rule group, and mark it active, do not delete the previously active rule group until after the rules have been released.

**TIP:** Rule groups can serve as historical reference for the leads. Instead of deleting rule groups, you can mark them as inactive.

## About Group Assignment

If your company assigns records to entire groups instead of one employee, your company administrator must:

- 1 Select the Default Group Assignment field in the Company Profile page (see [Setting Up Your Company Profile and Global Defaults](#) (on page 16)).
- 2 Set up the groups before activating the assignment rules (see [Setting Up Groups](#) (on page 259)).

- 3 Select one member in the group to be the owner for accounts or opportunities during the assignment procedure.

**NOTE:** The group functionality is not supported for lead or service request records.

When the record is assigned to an owner in the group:

- The Owner field shows the owner's information.
- The Primary Group field shows the group name that the owner belongs to on the record Edit and Detail pages, if the company administrator added the field to the layout.
- The record appears in the areas of the applications that normally display that employee's records, such as Homepages and record lists.

Generally, all members in the group have full access to the record, although access levels can be adjusted to restrict a user's access.

### About Assignment Manager and Record Ownership Modes

The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. If there is a primary custom book assigned to the record before the assignment manager reassigns the record to an owner, then the assignment manager removes the primary book from the record. The assignment manager cannot reassign records if the record type is configured in book mode. If you configure a record type in book mode, then it is strongly recommended that you make all rule groups for that record type inactive. For more information about record ownership modes, see [About Record Ownership Modes](#) (on page 223).

### Scenario for Assigning Leads

The following is an example of a typical company's business rules for assigning leads. To set up the rules that automatically assign this company's leads, the administrator does the following:

- 1 States the company's business rules for assigning leads to people.  
For example, for accounts in the U.S., many sales territories are assigned by state, but in certain states, the product expertise determines the territory assignments. In addition, Corporation XYZ account is always assigned to one particular sales manager regardless of the lead's state or product interest.
- 2 Lists all of the assignment scenarios that are necessary to cover the business rules:
  - **Account (company) is Corporation XYZ.** Assign to Sales Manager A.
  - **Primary Address - State is CA, NV, OR, WA.** Assign to Sales Manager B.
  - **Primary Address - State is OH, IN, MI, NY, KY.** Assign to Sales Manager C.
  - **Lead is interested in the ABC Product (in all states except those listed already, and not for Corporation XYZ).** Assign to Sales Manager D.
  - **Primary Address - State is not listed.** Assign to Sales Manager E.
- 3 Puts the scenarios in the order in which they are to be considered.

First, examine the Account field. If the value is Corporation XYZ, assign the lead to Sales Manager A, regardless of any other conditions. If this criterion is not matched, examine the Primary Address State field. If the value is CA, NV, OR, or WA, assign the lead to Sales Manager B, and so on.

As a best practice, use the Record Assignment Template to help you plan your company's assignment scenarios, and to set up rules that give you the results you want.

## Criteria Conditions in Assignment Rules

You can use the following conditions in the criteria on assignment rules:

- **Between.** Matches the rule to records where the value in the criterion field is between two values defined on the rule criterion. (The results do not include records where the value in the criterion field is equal to one of the values on the rule.) Use a comma to separate the values. Do not use a dash (-) to specify a value range or to separate values.

Use the Between condition for date fields only. Use the MM/DD/YYYY date format.

- **Contains all values.** Matches the rule to records where the criterion field contains the criterion value on the rule. For example, if you enter *qual* as the criterion value, the rule is matched to records where the criterion field contains a value that includes the string *qual*, such as *qualifying* or *qualified*.

You cannot use the Contains all values condition for date fields or number fields.

- **Contains exact field value.** Matches the rule to records where the criterion field contains all of the string in the criterion field value, and no additional characters. For example, if you enter *Closed* as the criterion value, the rule is matched to records where the criterion field value is *Closed*, but not records where the criterion value is *Closed/won*.

You cannot use the Contains exact field value condition for date fields or number fields.

- **Contains none of the values.** Matches the rule to records where the criterion field contains any values that are not equal to the rule criterion value.

You cannot use the Contains none of the values condition for date fields or number fields.

- **Less than or equal to.** Matches the rule to records where the value in the criterion field is less than or equal to the rule criterion value.

You can use the Less than or equal to condition for number fields and currency fields only.

- **Greater than or equal to.** Matches the rule to records where the value in the criterion field is greater than or equal to the rule criterion value.

You can use the Greater than or equal to condition for number fields and currency fields only.

Note the following points regarding rule criteria:

- A rule without criteria always succeeds.
- Rules are evaluated in sequential order, and evaluation stops when the criteria on a rule are met.

For example, if ten rules are being evaluated and the criteria on rule 6 are met, then rules 7, 8, 9, and 10 are ignored (that is, they are not evaluated). Similarly, if there are no criteria on rule 6, rule 6 succeeds, and rules 7, 8, 9, and 10 are ignored.

For step-by-step instructions on how to set up assignment rules, see [Setting Up Assignment Rules](#) (on page 326).

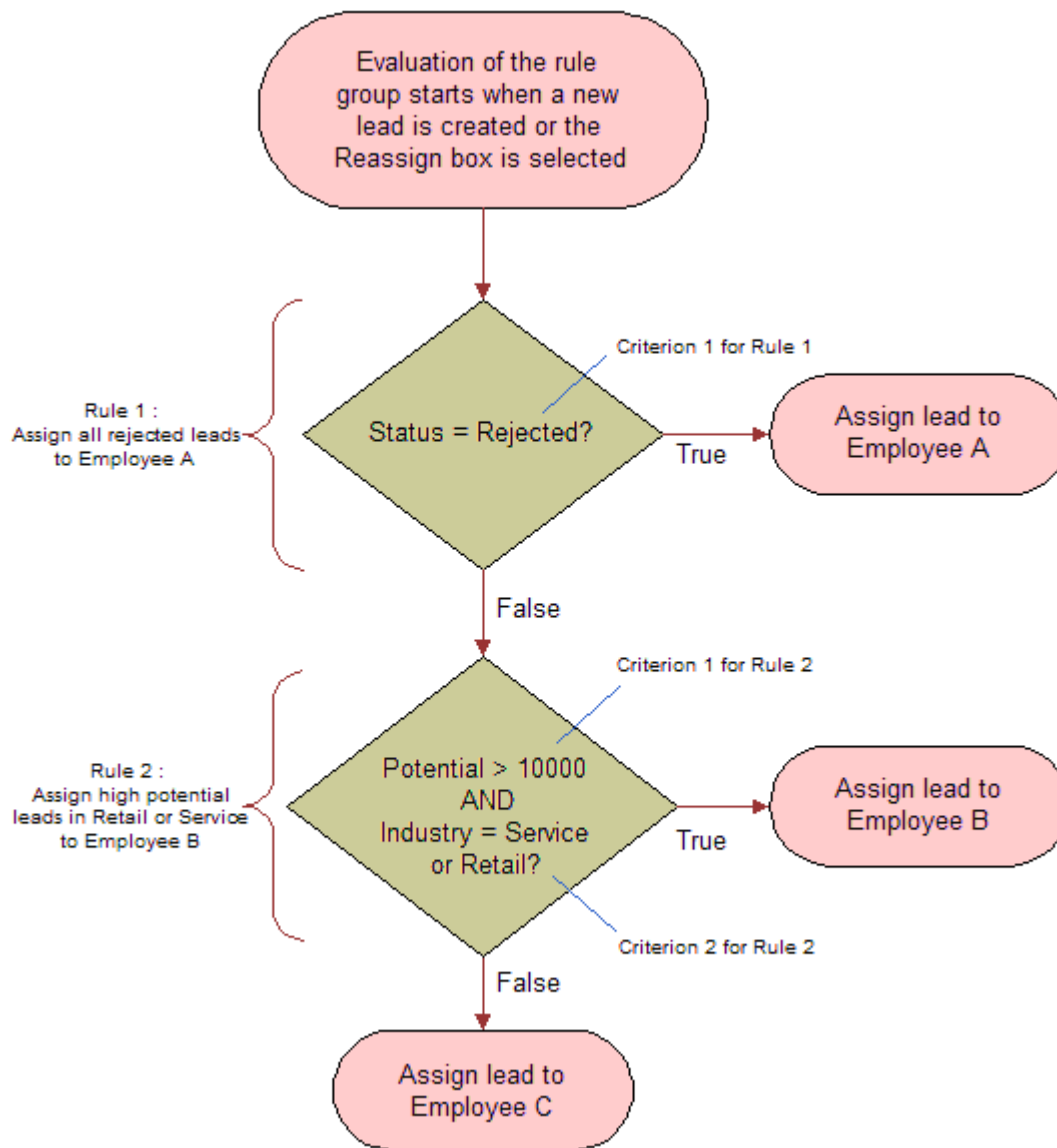
## Setting Up Assignment Rules

### Before you begin:

- To set up the assignment rules, your role must include the Data Rules and Assignment privilege.
- For information about designing your assignment rules, see [About Assignment Rules](#) (on page 321).

### Assignment Rule Group Example

Rule groups are made up of rules, which, in turn, are made up of criteria. The following figure shows the components of a rule group.



**Figure 1: How a Lead Assignment Rule Group Is Evaluated**

**NOTE:** For correct behavior of the Reject button on the Lead Detail page, the first rule in the rule group must assign rejected leads.

#### **To set up assignment rules**

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.

- 3 In the Assignment Rules section, click the link for the appropriate record type.  
A list of all of the rule groups that have been defined for your company to date appears.

- 4 Create a new rule group:

- a Click the New Rule Group button.
- b On the New/Edit page, fill in the fields.

Field	Description
Rule Group Name	A unique name, up to 30 characters.
Active Rule Group	Only one rule group can be active at a time. If you specify a new rule group as active, the previously-activated rule group becomes inactive.
Unassigned Owner	An employee who inherits the records that are not assigned by one of the rules.  <b>Example:</b> Employee C in Figure 1.
Return E-mail	This field appears for lead and service request rule groups only. The email address that you specify in the Return E-mail field on the assignment rule group appears in the Sender field in the email notifications that are sent to the owners of leads and service requests. Also, if an email recipient responds to an email notification, then the To field in the reply is set to the address that you specify in the Return E-mail field.  <b>NOTE:</b> No email notifications are sent for account and opportunity records.
Unassigned Account Territory	A territory that inherits the records that are not assigned by one of the rules.  This field appears for account rule groups only.
Unassigned Opportunity Territory	A territory that inherits the records that are not assigned by one of the rules.  This field appears for opportunity rule groups only.

- c Save the record.  
This saves the name of the new rule group in preparation for adding rules to the rule group.

- 5 Add a rule to the rule group:

- a In the Rules title bar on the Rule Group Detail page, click New.



- b** On the New/Edit page, fill in the fields.

The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Rule Name	A unique name.	Assign high potential leads in Retail or Service
Order	The order in which the rules are evaluated. When the criteria on one rule are met, the record is assigned and subsequent rules are ignored.	1
Assign To Owner	If the rule criteria are met, the record is assigned to this user.  For group assignment of accounts and opportunities, the user must be a member of the group sharing the records.	Employee B
Assign To Territory	If the rule criteria are met, the record is assigned to this territory.  This field appears for account and opportunity rules only.	North Eastern Region
Include Related Contacts	If the rule criteria are met, the contacts linked to the account are assigned to the specified account owner and territory.  This field appears for account rules only.	Not applicable
Include Related Opportunities	If the rule criteria are met, the opportunities linked to the account are assigned to the specified account owner and territory.  This field appears for account rules only.	Not applicable
Include Team Assignment	If the rule criteria are met, the team members are assigned to the account.  This field appears for account and opportunity rules only.	Not applicable

- c** Save the record.

This saves the rule so you are now ready to add criteria to the rule.

- 6** (Optional) For accounts and opportunities, update the access for linked records and users:

- a** On the Rule Group Detail page, click the Name link of the rule where you want to update the access for linked records and users.
- b** On the Rule Detail page, click Add Users or Edit Users in the Team Assignment title bar.
- c** Click the Lookup icon and select the users.
- d** Assign the access level for accounts, contacts, and opportunities.
- e** Save your changes.

**7** Add a rule criterion to the rule:

- a** In the Rule Criteria title bar on the Rule Detail page, click New.
- b** On the New/Edit page, fill in the fields.

The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Field	Name of the field to be evaluated. <b>NOTE:</b> If a field has been relabeled, the new field name appears.	Potential Revenue
Condition	The following conditions cannot be used for date fields or number fields: Contains all values, Contains exact field value, and Contains none of the values.  The following conditions can be used for number fields and currency fields only: Greater than or equal to, Less than or equal to.  The Between operator can be used for date fields only.	Greater than or equal to
Value(s)	Use commas to separate values. If the value you want to match includes a comma, such as an address, enclose the value in quotation marks.  If the condition is Between, enter the minimum and maximum values separated by commas.	10000

- c** Do one of the following:
  - If you want to add more criteria to the rule, click Save and New Rule Criteria and go back to Step b. If you have multiple criteria defined for a rule, the record must match *all of the criteria* in order for the rule to be matched.
  - If you have entered all criteria for the rule, click Save.

**8** In the Rule title bar on the Rule Detail page, click Back to Rule Group Detail.

**9** On the Rule Group Detail page, do one of the following:

- If you want to add more rules to the rule group, go back to Step 5.
- If you have entered all the rules for the rule group, click Back to Rule Group List to finish.

**TIP:** Rules are executed in the order they appear in the Rule Group, so make sure they appear in the correct sequence. After one rule is met, subsequent rules are ignored.

### ***To edit, activate, or inactivate a rule group***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Assignment Rules section, click the link for the type of assignment rules that you want to edit.  
A list of all the rule groups of that type that have been defined for your company to date appears.
- 4 Click the Rule Group link that you want to update.
- 5 On the Rule Group Detail page, click Edit.
- 6 Update the fields, and save the record.

The changes that you make take effect at midnight Oracle Server time (default), or whenever your assignment rule groups have been set to update.

**CAUTION:** When you mark a rule group *active*, the rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you mark a rule group *active*, do not delete the previously active rule group until after the rules have been released.

### ***To edit assignment rules***

- 1 On the Rule Group Detail page, click the Edit link of the rule that you want to change.
- 2 Update the fields.

**NOTE:** You can change the order in which rules are evaluated by editing the Order field. On the rule that you want to change, enter an order number that is higher than the order number of the rule that is to precede the rule you are changing, and lower than the order number of the rule that is to follow it.

For example, if there are three rules, ordered 1 through 3, and you want to change the order so that the rule that is currently number 1 is evaluated after the rule that is currently number 2, change the order of rule number 1 to a value, such as 2.1 (or any value greater than 2 and less than 3).

- 3 Save the record.

## **Lead Conversion Administration**

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records.

When users convert a lead record, they can do one of the following:

- Create new account, contact, opportunity, or deal registration records, which are linked automatically to the lead record.
- Link the lead record to existing account and contact records. Users select the records that they want to link to the lead when they convert the lead.

You can determine which options are available to users on the Convert Lead page by creating lead conversion layouts for the page, and assigning these layouts to user roles.

During the lead conversion, some values are carried over to the new records by default. However, you can extend the amount of information that is carried over by mapping additional fields, including custom fields.

To convert leads, users must have the appropriate access to record types and the appropriate privileges in their role.

When users reject a lead, they must select a rejection code in the Reject Code field in the Reject a Lead page. A number of values are provided by default for the Reject Code field, but you can change these values or add more values to the list. For more information about the Reject Code picklist, see [Reject Code for Leads](#) (on page 335).

### Related Topics

For more information about lead conversion administration, see the following topics:

- [Process of Setting Up Lead Conversion](#) (on page 332)
- [Mapping Additional Fields During Lead Conversion](#) (on page 333)
- [Creating Lead Conversion Layouts](#) (on page 333)

## Process of Setting Up Lead Conversion

To set up lead conversion and rejection settings for your users and record types, perform the following tasks:

- 1 If you want to map additional fields during lead conversion, set up the new mappings.  
For more information on mapping fields, see [Mapping Additional Fields During Lead Conversion](#) (on page 333).
- 2 If you want to customize the layout of the Convert Lead page:
  - a Create the new layouts.  
For more information on creating layouts, see [Creating Lead Conversion Layouts](#) (on page 333).
  - b Add the new layouts to the appropriate roles.  
For more information on adding roles, see [Adding Roles](#) (on page 210).
- 3 Make sure that the users have the appropriate access to record types and the appropriate privileges in their role.  
For more information about the settings that are required for converting leads, see [Access Profile and Role Settings for Converting Leads](#).
- 4 If you want to edit the values in the Reject Code picklist, edit the field values.

For more information on editing field values, see [Creating and Editing Fields](#) (on page 75). For more information about the Reject Code picklist, see [Reject Code for Leads](#) (on page 335).

## Mapping Additional Fields During Lead Conversion

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records.

When users convert leads to account, contact, opportunity, or deal registration records, some values are carried over to the new records by default. However, you can extend the amount of information that is carried over by mapping additional fields, including custom fields.

**NOTE:** Do not map Web link fields for lead conversion. Web link fields do not contain data, instead, they contain scripts for links that users can click to perform actions. The contents of Web link fields cannot be carried over to the new records when a lead is converted.

When users convert a lead record, the values in the mapped fields are carried over as follows:

- When users create new account, contact, opportunity, or deal registration records, the values from the mapped fields on the lead record are carried over to the specified fields in the new record.
- When users link the lead record to existing account, contact, opportunity, or deal registration records that they select when converting the lead, the fields in the existing records that already have values remain unchanged. Fields that are empty are updated with the value from the mapped lead field.

### About Customized Picklist Fields and Values

You can map picklist fields from the lead record to text fields (long or short) on account, contact, opportunity, and deal registration records, or to a picklist field with identical values.

**Before you begin.** To perform the following procedure your role must include the Data Rules and Assignment privilege.

#### *To map additional fields when converting a lead record*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click Data Rules & Assignment.
- 3 In the Lead Conversion Administration section, click Lead Conversion Mapping.
- 4 On the Lead Conversion Mapping page, select the fields to map.
- 5 To revert the mapping back to the default settings, click the Default button in the title bar.
- 6 Click Save.

## Creating Lead Conversion Layouts

You can specify what options are available to users when they convert leads, by creating customized layouts for the Convert Lead page, and then assigning the layouts to user roles.

**NOTE:** To convert leads to accounts, contacts, opportunities, or deal registrations, users must also have the appropriate settings in their access profiles and role. For more information about the settings that are required for converting leads, see [Access Profile and Role Settings for Converting Leads](#).

The following table shows the options that you can make available on the Convert Lead page.

Record Type	Options
<b>Account</b>	Do Not Convert to Account Use Existing Account Auto-create New Account
<b>Contact</b>	Use Existing Contact Auto-create New Contact
<b>Opportunity</b>	Do Not Convert to Opportunity Auto-Create New Opportunity
<b>Deal Registration</b>	Do Not Create Deal Registration Auto-Create Deal Registration <b>NOTE:</b> The Deal Registration options are applicable only if your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition.

A standard layout is provided. The standard layout includes all of the options for accounts, contacts and opportunities, but not the options for deal registrations. You can copy the standard layout and then edit the copy, but you cannot edit or delete the standard layout.

Depending on the options you make available for a record type, the record type sections on the Convert Lead page are affected as follows:

- If you do not make any of the options available for a record type, the Convert Lead page does not include a section for that record type.
- If you make only the Do Not Convert to Account option available for the Account record type, the Accounts section page does not appear on the page.
- If you make only the Do Not Convert to Opportunity option available for the Opportunity record type, the Opportunity section does not appear on the page.
- (Applicable in Oracle CRM On Demand Partner Relationship Management Edition only) If you make only the Do Not Create Deal Registration option available for the Deal Registration record type, the Deal Registration section does not appear on the page.

**Before you begin.** To perform the procedure described in this section, your role must include the Data Rules and Assignment privilege.

### ***To create a lead conversion layout***

- 1 In the upper-right corner of any page, click the Admin global link.

- 2 In the Business Process Management section, click Data Rules & Assignment.
- 3 In the Lead Conversion Administration section, click Lead Conversion Layout.
- 4 In the Lead Conversion Layout List page, click New Layout.
- 5 In Step 1, Layout Name:
  - a Enter the name for the layout.
  - b (Optional) Enter a description for the layout.
  - c If you want this layout to be the default for all users, select the Default Lead Conversion Layout check box.

**NOTE:** By default, the Standard Lead Conversion Layout provided in Oracle CRM On Demand acts as the default lead conversion layout for the company unless another layout is marked as the default. If you create another layout, and select the Default Layout check box for the new layout, the Standard Lead Conversion Layout will no longer be the default. So, the Standard Lead Conversion Layout is the default layout for the company only when the Default Layout check box is deselected for any other layout. However, the Default Layout check box for the Standard Lead Conversion Layout always remains deselected, even when it is acting as the default.
- 6 In Step 2, Select Actions, highlight the record type for which you want to select the actions (Account, Contact, Opportunity, or Deal Registration) in the Lead Conversion Record Type section, and then click the arrows to move the actions you want to display on the page from the Lead Conversion Available Actions section to the Lead Conversion Selected Actions section. Repeat this step for each of the record types.
- 7 In Step 3, Confirm, review your selections, and if necessary, return to Step 2, Select Actions to change your selections.
- 8 Click Finish to save your changes.

## Reject Code for Leads

When users reject a lead, they must select a rejection code in the Reject Code field in the Reject a Lead page. Users can also enter a text description of the reason for the rejection in the Reject Reason field. If a user selects the *Other* value in the Reject Code field, the Reject Reason field becomes a required field, and the user must enter a description of why the lead was rejected. Otherwise, the Reject Reason field is optional.

A number of values are provided by default for the Reject Code field, but you can change these values, or add more values to the list. The default values are:

- 3rd Party Contact
- Do Not Contact Again
- Duplicate
- Failed to Reach Contact
- Inappropriate Contact
- Insufficient Data

- Invalid Phone Number
- No Business Opportunity
- Opportunity in Progress
- Other
- Recently Contacted (<30 days)
- Data Entry/System Error
- Already Owns Product
- Targeting Criteria Not Met

For information about editing picklist values, see [Creating and Editing Fields](#) (on page 75).

**NOTE:** If you rename the *Other* value, the Reject Reason field still becomes a required field when the user selects the renamed value in the Reject a Lead page.

## Setting Up the Forecast Definition

Forecasts in Oracle CRM On Demand automate the generation of sales forecasts according to the settings that you define. Forecasts are generated automatically on either a weekly or monthly basis. Each generated forecast is saved to the archive, providing a historical record that you can refer to and analyze.

Every forecast is a snapshot of information about revenue and potential revenue for the quarter. Forecasts enable sales professionals and managers to track their quarterly sales performance against planned quotas, actual closed revenue, and expected revenue, given the current status of their sales opportunities.

Participants in forecasts are chosen by role. Your company's reporting structure, and the roles you choose for the forecast participants must be set up so that the participants roll up to one top-level user. Typically this top-level user is a company vice-president or chief executive officer (CEO).

When you generate a forecast, Oracle CRM On Demand alerts employees that the forecast has been created and is ready for review by posting an alert on My Homepage for each participant for two days. To extend the period during which the alert appears, update the Expiration Date field for that alert. For information on alerts, see [Publishing Company-Wide Alerts](#) (on page 47).

## Determining the Forecast Type

Your company can base its forecasts on any of the following: opportunities, products, accounts, or contacts. There are four types of forecasts:

- Opportunity product
- Opportunity revenue
- Account revenue
- Contact revenue

Your company can generate multiple forecast types on the specified forecast dates set for forecast generation. When you select the forecast settings for your company, you determine which forecast types your entire company uses.



**NOTE:** Each forecast type requires sales employees to take certain actions. Make sure to communicate which types of forecast you will be using before your sales employees begin creating opportunity, account, and contact records.

### **Opportunity Product Forecasts**

Opportunity product forecasts report on the products linked to an opportunity. The forecast numbers for the opportunity product forecasts are calculated from the Quantity, Revenue, and Expected Revenue fields on all products that are owned by a forecast participant and have revenue that is scheduled to be recognized during the forecast period. The revenue for a product can be reported at one time, or it can be reported during several periods.

Opportunity product forecasts require sales representatives to link products to their opportunity records. Sales representatives must also fill in the quantity, purchase price, and the start and close date to indicate which products they want to include in their forecasts.

To be included in the forecast, an opportunity product record must:

- Have a close date during the forecast period
- Be owned by a forecast participant

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see [About Opportunities and Forecasts](#).

Set up an opportunity product forecast if your company wants to forecast one-time or recurring revenue that is based on products.

### **Opportunity Revenue Forecast**

Opportunity revenue forecasts report on the revenue noted in the opportunity records. The forecast numbers are calculated from the Revenue and Expected Revenue fields on all opportunity records where the following conditions apply:

- The opportunity has a close date during the forecast period
- One of the following is true:
  - The opportunity is owned by a forecast participant
  - A forecast participant is a member of the opportunity team and has a share of the opportunity revenue that is greater than zero percent (that is, the value in the Split % field on the Opportunity Team page is greater than zero).

**NOTE:** For revenue on an opportunity to be shared among team members, the [Enable Opportunity Revenue Split](#) check box must be selected on the company profile.

Opportunity revenue forecasts require sales representatives to fill in the opportunity Revenue and Close Date fields to indicate which opportunities they want to include in their forecasts. Any linked products are ignored in the forecast.

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see [About Opportunities and Forecasts](#).

Set up an opportunity revenue forecast if you want to forecast total opportunity revenue, regardless of how much revenue comes from individual products.

### Account and Contact Revenue Forecasts

Account revenue and contact revenue forecasts report on the revenue listed on revenue records that are linked to account or contact records. The forecast numbers are calculated from the Revenue and Expected Revenue fields for the records that meet the criteria for inclusion in the forecast. To be included in the forecast, an account or contact revenue record must meet the following conditions:

- The record must be owned by a forecast participant.
- The record must have a status of Open, Pending, or Closed.
- The record must have the Forecast field selected.
- The record cannot be linked to an opportunity.
- The record must have revenue that is scheduled to be recognized during the forecast period.

The revenue for an account or contact can be reported at one time, or it can be set up to recur over time. Account revenue and contact revenue forecasts require users to link revenues to their account or contact records. Users must also update the Start/Close date, Status, and Forecast fields on the revenue record to indicate which products they want to include in their forecasts.

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see [Tracking Revenue Based on Accounts](#), and [Tracking Revenue Based on Contacts](#).

Set up an account or contact revenue forecast if your company wants to forecast one-time or recurring revenue.

### Selecting Forecast Duration

You can configure forecasts to display revenue projections for up to four quarters. With the extended forecast capability, you can view a forecast for the current quarter, and for the following one, two, or three quarters.

By default, the forecast duration is set to one quarter (meaning only the current quarter is included in the forecast). When you change the duration setting to include multiple quarters, the forecast includes the current quarter as well as future quarters. For example, if you select a two-quarter forecast duration, the forecast includes the current quarter and the next quarter.

### Designating Forecast Roles

As part of your forecast definition, you select which roles are to be included. When you add a role to the forecast definition, all users who are assigned that role are designated as forecast participants.

### User Setup for Forecasts

The users that you intend to include in your company's forecasts must be set up correctly. Their user records must meet the following conditions:

- The record must have a valid value in the Role field.
- The record must have a valid value in the Reports To field or in the Reports To (Alias) field, depending on which of these fields appears on the page layout for the user record.
- The status of the user must be set to Active unless you select the option to allow forecasts for inactive users.

**CAUTION:** If any of the users included in the forecast are set up incorrectly, the entire forecast will fail.

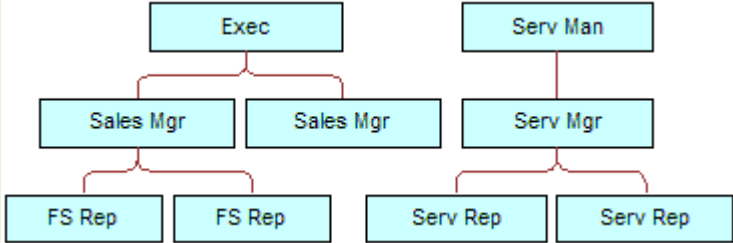
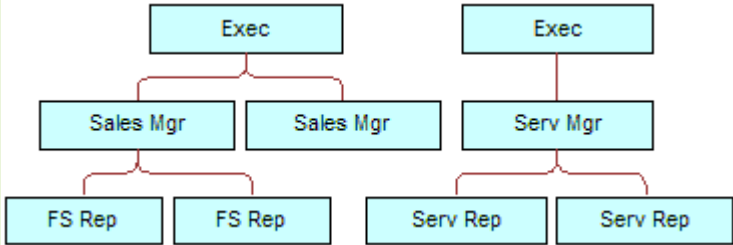
### Examples of Reporting Structures and Roles for Forecasting

To generate forecasts you must set up your company's reporting structure correctly. The forecast hierarchy is based on the hierarchy specified in the Reports To or Reports To (Alias) field on the user records. All forecast participants, except for one top-level user, must report to another forecast participant, so that all individual forecasts roll up to one company-wide forecast. If there is more than one forecast participant who does not report to another forecast participant, or if any manager with forecast participants as direct reports has a status of Inactive, then the forecast will fail.

**NOTE:** If the forecast fails to generate because of a problem with the reporting structure, the primary contact (indicated on the company profile) receives an email notification from Customer Support. After the reporting structure has been corrected and the forecast has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

The following table shows reporting structure and participant role combinations that work and don't work for forecast generation.

For This Reporting Structure	Forecasting Works or Fails	Because
<pre> graph TD     Exec1[Exec] --&gt; Exec2[Exec]     Exec1 --&gt; Exec3[Exec]     Exec2 --&gt; SalesMgr1[Sales Mgr]     Exec2 --&gt; SalesMgr2[Sales Mgr]     Exec3 --&gt; ServMgr[Serv Mgr]     SalesMgr1 --&gt; FSRep1[FS Rep]     SalesMgr1 --&gt; FSRep2[FS Rep]     SalesMgr2 --&gt; FSRep3[FS Rep]     SalesMgr2 --&gt; FSRep4[FS Rep]     ServMgr --&gt; ServRep1[Serv Rep]     ServMgr --&gt; ServRep2[Serv Rep] </pre>	Works with this role combination:	Participants roll up to one top-level participant.
	Fails with this role combination:	Participants do not roll up to one participant. They roll up to two sales managers.
	Fails with this role combination:	The field sales reps roll up to a sales manager who is not a participant.

For This Reporting Structure	Forecasting Works or Fails	Because
 <pre> graph TD     Exec1[Exec] --- SM1[Sales Mgr]     Exec1 --- SM2[Sales Mgr]     SM1 --- FS1[FS Rep]     SM1 --- FS2[FS Rep]     SM2 --- FS3[FS Rep]     SM2 --- FS4[FS Rep]     ServMan[Serv Man] --- SM3[Serv Mgr]     SM3 --- SR1[Serv Rep]     SM3 --- SR2[Serv Rep] </pre>	Works with this role combination: <ul style="list-style-type: none"> <li>Executive</li> <li>Sales Manager</li> <li>Field Sales Rep</li> </ul>	Participants roll up to one participant.
 <pre> graph TD     Exec2[Exec] --- SM4[Sales Mgr]     Exec2 --- SM5[Sales Mgr]     SM4 --- FS5[FS Rep]     SM4 --- FS6[FS Rep]     SM5 --- FS7[FS Rep]     SM5 --- FS8[FS Rep]     Exec3[Exec] --- SM6[Serv Mgr]     SM6 --- SR3[Serv Rep]     SM6 --- SR4[Serv Rep] </pre>	Fails with this role combination: <ul style="list-style-type: none"> <li>Executive</li> <li>Sales Manager</li> <li>Field Sales Rep</li> </ul>	Two participants report to no one. Only one participant in the forecast (at the top of the structure) can report to no one.

### Including Inactive Users in Forecasts

Forecasts can include inactive users as well as active users. When you set up your forecast definition, you indicate whether inactive users are to be included in the forecasts.

### Allowing Managers to Submit Forecasts for their Direct Reports

When you set up your forecast definition, you indicate whether managers can automatically submit forecasts for their direct reports when they submit their forecasts.

### Forecasts and Custom Fiscal Calendars

When using custom fiscal calendars, your company's custom fiscal calendar definition are used in the generation of forecasts and therefore the forecast period months align with the custom fiscal calendar months.

Your company administrator must create a custom fiscal calendar record for each year for which you want to create forecasts in Oracle CRM On Demand. If a sufficient number of fiscal calendars needed to support the selected forecast duration have not been created, it prevents the forecast series from generating and forecasts from being created.

**NOTE:** If the forecast fails to generate because of insufficient fiscal calendars, the primary contact (indicated on the company profile) receives an email notification from Customer Support. After the fiscal calendar records to support the forecast definition have been created, and the forecast definition has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

### About the Email Notifications for Forecast Failures

In the email notifications that are sent when forecasts fail, the From address is always donotreply@crmondemand.com and the Sender field is always set to support@crmondemand.com. Oracle CRM On Demand appends a string to each email so that the email can be tracked in the email delivery system at Oracle. If the email recipient attempts to respond to the email, then the address in the To field in the reply is automatically set to support@crmondemand.com.

The following procedure describes how to set up the forecast definition.

### *To set up the forecast definition*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 Under the Forecast Administration section, click Forecast Definition.
- 4 On the Forecast Definition page, click Update.
- 5 In Step 1, Select Forecast Types, select the Active check box for each forecast type that you want to generate.

Your company can forecast sales revenue that is based on opportunity products, opportunity revenue, account revenue, and contact revenue.

- 6 In Step 2, Select Forecast Frequency:
  - a In the Forecast Duration field, select the forecast duration.

**NOTE:** The fiscal calendar settings selected for your company determine the duration of each quarter. The start date and end date of the forecast duration will be calculated according to the fiscal calendar start date and fiscal calendar type set on your company profile. For the fiscal calendar type of Custom Fiscal Calendar, the start and end dates are based upon the fiscal calendar as defined by your company administrator.
  - b In the Create Forecast Snapshot Each field, specify how frequently the forecast snapshot is to be created.

You can select weekly or monthly or monthly forecasts.

**NOTE:** If you select Month, the selected fiscal calendar type for your company determines the length of the month.
  - c In the Forecast Snapshot Day field, select the day of the month or the week that the forecast snapshot is to be created.

Forecasts are generated at the start of the selected day (that is, at one minute past midnight) in the time zone of the hosting facility. If your forecast is monthly and the current month does not contain the day selected as the day for the forecast to be generated, Oracle CRM On Demand adjusts the snapshot to generate a forecast on the last day of the month. For example, if the Forecast Snapshot Day is set to the 30th, and the current month is February, Oracle CRM On Demand adjusts the forecast snapshot to generate the forecast on the 28th.

- 7 In Step 3, Select Forecast Roles:

- a** Add the roles for those users who are to participate in the forecast to the Forecasting Roles area. Click the arrows to move company roles to the Forecast Roles list.
  - b** To allow forecasts for inactive users, select the Allow Forecasts for Inactive Users check box.
  - c** To allow a manager to submit forecasts automatically for their direct reports, select the Auto-submit forecasts for team upon manager submit check box.
- 8** Click Finish.
- 9** On the Forecast Definition page, verify the forecast details by reviewing the forecast snapshot frequency, the forecast snapshot day, next forecast series dates, and the list of forecast series participants.

**CAUTION:** After you set up your forecast definition, certain changes to user records or fiscal calendars require you to update your forecast definition settings. For more information, see [Updating the Forecast Definition](#) (on page 342).

## Updating the Forecast Definition

You can update your company's forecast definition to change the forecast frequency, or to add or remove roles, and so on. In addition, when certain changes are made to user records, or if your fiscal calendar is modified, you must update the forecast definition so that it incorporates the changes.

You must update your forecast definition when any of the following changes are made:

- The manager for a forecast participant is changed. The manager information is stored on the user record of the forecast participant in the Reports To field or the Reports To (Alias) field, depending on which of these fields appears on the page layout for the user record.

If the manager for a forecast participant is changed, then you must update the forecast definition as follows:

- If the role assigned to the new manager is not currently included in the forecast definition, then you must add the role to the forecast definition.
- If the role assigned to the new manager is currently included in the forecast definition, then you must refresh the forecast definition so that the new reporting structure is reflected in future forecasts.

**NOTE:** The forecast participant hierarchy must include managers for everyone except the person at the top level.

- Users who are participants in the forecast hierarchy are deactivated.

When an employee leaves your company, you must change the status for that user to Inactive. If the inactive employee was a manager in the forecast hierarchy, then the user record of any forecast participant who reports to that employee must also be updated.

In this case, you must update the forecast definition as follows:

- If the role assigned to the new manager is not currently included in the forecast definition, then you must add the role to the forecast definition.
- If the role assigned to the new manager is currently included in the forecast definition, then you must refresh the forecast definition so that the new reporting structure is reflected in future forecasts.

**NOTE:** If your forecast definition allows forecasts for inactive users, then you do not need to update the forecast definition when a forecast participant is made inactive.

- Users are added to, or removed from the roles included in the forecast definition.

In this case, you only need to refresh the forecast definition so that it incorporates the changes.

- Changes are made to your fiscal calendar.

In this case, you only need to refresh the forecast definition so that it incorporates the changes.

**NOTE:** You must refresh the forecast definition when a change is made to your fiscal calendar, regardless of the type of fiscal calendar your company uses (standard or custom).

**NOTE:** When any of the changes described here are made in Oracle CRM On Demand, the forecasts that are generated do not reflect the changes until the forecast definition is updated.

The following procedure describes how to update the forecast definition.

#### ***To update the forecast definition***

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 Under the Forecast Administration section, click Forecast Definition.
- 4 On the Forecast Definition page, click Update.
- 5 In Step 1: Select Forecast Type, if any changes are needed, make the changes.
- 6 Click Step 2: Select Forecast Frequency.
- 7 If any changes are needed in Step 2: Select Forecast Frequency, make the changes.
- 8 Click Step 3: Select Forecast Roles.
- 9 If any changes are needed in Step 3: Select Forecast Roles, make the changes.
- 10 Click Finish.

Your forecast definition is automatically updated and a summary of the definition, including the updated list of forecast participants, is displayed on the Forecast Definition page.

## **Setting Up Sales Processes, Categories, and Coaches**

You can create a customized sales methodology that reflects the requirements and complexity of your sales environment, and guides your sales representatives as they work on deals at various sales stages.

You can adjust the sales stage information to reflect your company's sales process or business practices. When employees create and update opportunities, they select a sales stage that represents how far along the opportunity is in the sales process. Each sales stage is tied to a percentage. That information is used with reports and forecasts, including your pipeline, expected revenue, and closed revenue calculations.

As part of customizing the sales stage values themselves, you can:

- Rename the sales stages

- Add or delete sales stages
- Change the sequence of the sales stages
- Change the probability percentages associated with the sales stages

### About Sales Processes

Some sales environments require only one sales process with one set of sales stages. Other sales environments are more complex and require multiple sales processes with distinct sales stages for each process. For example, internal sales representatives might follow a different sales process from the one followed by field sales representatives.

Additionally, sales representatives might need to follow different sales processes for different types of opportunities. For example, when your sales representatives are selling a piece of equipment, they might need to follow a longer, multi-stage sales process. But when they are selling a service contract, the process might be shorter and have fewer sales stages.

To further refine your sales methodology, you can define series of sales stages as sales processes and link each process to one of these:

- Opportunity type
- User's role

This allows you to customize the sales process (and sales stages with each process) for different opportunity types or different user roles.

**Example:** Your sales representative creates a new opportunity. When entering information about the opportunity, she selects Service from the Opportunity Type options. This causes the application to display the sales process appropriate for that opportunity type.

**NOTE:** The sales process based on opportunity type overrides the defaulted sales process based on a user's role. In other words, when an employee creates an opportunity, her role's default sales process is assigned to the opportunity. If she then selects an opportunity type that has an assigned sales process, the sales process for the opportunity is then driven based on the opportunity type she selected.

### About Sales Stage Categories

You can also set up sales stage categories, such as Stage 1, 2, or 3, which you can link to specific sales stages across different sales processes. When you need to consolidate information from different processes, you can run reports against the sales stage categories, providing an accurate view of your pipeline across all opportunity types or roles.

### About Sales Process Coach

You can also use the Sales Process Coach to guide your team through completing the necessary information accurately at each sales stage. The Sales Process Coach provides specific steps for employees to follow as well as useful information, such as documents, templates, and competitive information. You can also enforce the collection of information based on how opportunities progress through the sales cycle. In addition, when an opportunity record is saved, you can specify that certain tasks are automatically created, which appear in your employee's task list.

As part of the sales process coach, you can:



- Add information for each sales stage that employees access through the Coach button
- Set up requirements for each sales stage, such as fields to be filled in. These serve as prerequisites before saving the opportunity at a new stage.
- Set up automated tasks that are generated when employees save their opportunities with different sales stages

If you change any Sales Stage names after the system has been deployed, all previous records maintain their assigned Sales Stage until you manually update them.

**NOTE:** To change the default picklist values for the Probability % field, you need to edit that field from the Opportunity Field Setup page (see [Changing Picklist Values](#) (on page 87)).

When setting up your sales methodology, follow this general process:

- 1 Set up the sales stage categories (if you have more than one sales process).
- 2 Set up the sales process (or processes).
- 3 Set up the sales stages for each sales process.
- 4 Set up the coaching feature for the sales stages.

#### **Before you begin:**

- To perform this procedure, your role must include the Sales Stage Definition privilege.
- If you want to assign a sales process based on the Opportunity Type field, make sure the picklist values are the ones you want to use. The default Opportunity Type values are Renewal and New Business. For instructions on customizing picklist values, see [Changing Picklist Values](#) (on page 87).

Also, make sure that the Opportunity Type field appears in the page layout for each role you want to use it with. For instructions, see [Customizing Static Page Layouts](#) (on page 89).

#### **To set up a sales stage category (optional)**

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Sales Methodology section, click the Sales Categories link.
- 4 From the Translation Language list, select your company's primary language.
- 5 On the Sales Stage Categories page, click New to create a new sales stage category, or select Edit from the record-level menu for the sales stage category you want to edit.
- 6 On the Edit Sales Stage Category page or the New Sales Stage Category page, complete the required information.

Field	Description
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Field	Description
Stage Category	The name of the sales stage category.
Order	The sequence of the sales stage categories as they appear in Oracle CRM On Demand Answers.
Mark for Translation	<p>(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.</p> <p>When you add a new sales stage category name, the Mark for Translation check box is read-only. New names that you add automatically appear (without brackets and in black text) in the other activated languages.</p> <p>If you select the Mark for Translation check box when you update the name of a sales stage category, the updated name appears in the picklists for the other activated languages (in blue text with brackets) until you manually enter the translated versions. The blue text helps you to track which terms must be translated.</p> <p>If you do not select the Mark for Translation check box, the updated name does not appear in the other languages, and the other languages are not affected by the changes that you make on this page.</p>

- 7** Save the record.
- 8** To manually enter the translated equivalent of the new sales stage category:
  - a** From the Translation Language list, select the language.
  - b** Click the Edit link for the sales stage category.
  - c** Enter the translated equivalent in the Stage Category field, and click Save.

### ***To set up a sales process***

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.
- 3** In the Sales Methodology section, click the Sales Processes link.
- 4** From the Translation Language list, select your company's primary language.
- 5** On the Sales Process List page, click New to create a new sales process or select Edit from the record-level menu for the sales process you want to edit.
- 6** On the Sales Process Edit page, complete the required information.

Field	Description
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Field	Description
Default Sales Process	Company's default sales process. If no other sales process is assigned to your user role or to the opportunity type for the record, this sales process is used.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

**7** Click Save.

**8** To link the sales process to an Opportunity Type field value:

- a** On the Sales Process List page, click the Sales Process Name you want to link.
- b** In the Associated Opportunity Types title bar, click Add.
- c** Select the Opportunity Type, and click Save.

**NOTE:** You can link only one sales process to each opportunity type. After you do that, the opportunity type value is removed from the picklist for selection with other sales processes. This prevents you from linking more than one sales process to an opportunity type.

When employees have records with the Opportunity Type field corresponding to the value you selected, they see the sales stages for this sales process.

**9** To manually enter the translated equivalent of the new sales process:

- a** Go back to the Sales Process List page.
- b** From the Translation Language list, select the language.
- c** Click the Edit link for the sales process.
- d** Enter the translated equivalent in the Sales Process field and click Save.

**10** To select the sales process to use as the default:

- a** On the Sales Process List page, click the Sales Process Name link of the sales process you want to set as the default.
- b** Click Edit.
- c** Select the Default Sales Process check box.
- d** Save the record.

**NOTE:** This sales process is displayed for records or roles that have no other linked sales process.

### **To set up sales stages for a sales process**

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.
- 3** In the Sales Methodology section, click the Sales Processes link.
- 4** On the Sales Process List page, click the Sales Process Name link.
- 5** To set up a sales stage:
  - a** In the Sales Stage title bar, click New to create a new sales stage, or select Edit in the record-level menu of the sales stage you want to edit.
  - b** On the Sales Stage Edit page, complete the required information.

Field	Description
Default Probability	<p>A percentage that reflects the confidence that the deal will close with the specified revenue on the specified close date. By default, the probability assigned to an opportunity adjusts automatically based on the sales stage of the opportunity. Users can manually override this value, but when a user selects a new sales stage for the opportunity, the value in the Probability percentage field of the opportunity is automatically updated to the default probability value for the new sales stage.</p> <p><b>NOTE:</b> If the Mass Update feature is used to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field of the records is not updated to the default probability percentage for the new sales stage.</p> <p><b>Important:</b> Do not set up any other Sales Stages with probabilities equal to 0 or 100 percent except Closed/Lost and Closed/Won. Modifying picklists that are used internally by the Oracle CRM On Demand application can have an adverse impact on standard functionality.</p>
Order	Sequence of the Sales Stages as they appear in the picklist. If you add a Sales Stage, you need to change the order value for all subsequent Sales Stages. This way, you can be sure that the Sales Stage drop-down list in the Opportunity pages has the information in the correct order.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.
Stage Category	The name of the sales stage category that this sales stage falls under.

- 1** Save the record.
- 2** To manually enter the translated equivalent of the new sales stage:

- a** On the Sales Process Detail page, in the Sales Stage section, click Show Full List.
  - b** In the Sales Stage page, in the Translation Language field, select the language.
  - c** Click the Edit link for the sales stage.
  - d** Enter the translated equivalent in the Sales Stage Name field and click Save.
- 3** Save the record.

***To set up the coaching feature for the sales stages***

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.
- 3** In the Sales Methodology section, click the Sales Processes link.
- 4** From the Translation Language list, select your company's primary language.  
If you do not select your company's primary language, the Mark for Translation check box does not appear, and the application does not indicate untranslated terms you add here.
- 5** On the Sales Stage List page, click the sales stage link (in the Sales Stage column) you want to set up the coaching information for.
- 6** To make a field required for this sales stage:
  - a** In the Additional Required Fields title bar, click New.
  - b** On the Edit Additional Required Field page, select the field from the list.
  - c** Review the tips for entering default values that appear onscreen, and then enter the value you want to have as the default (optional).  
When you enter a default value, the default value is added to the record only if that field is blank. For example, if the record already has a Revenue value, specifying a default value for Revenue here will not cause the revenue amount already saved in the record to be overwritten.
  - d** Save the record.
- 7** To add guidelines for the sales stage for your employees to review, such as objectives and milestones to be achieved in the stage:
  - a** In the Process Coach Steps title bar, click New.
  - b** On the Process Coach Step Edit page, enter a number to indicate the sequence for this information to appear.  
When employees click the Coach button from their opportunity records, they can see the first 10 substeps. If you add more than 10, employees can view the entire list by clicking the Show Full List link.

**c** To mark the information for translation, select the Mark for Translation check box.

**d** Save the record.

When employees click the Coach button from their opportunity records for an opportunity record with this sales stage, this information appears on their Sales Process Coach page.

**8** To add an attachment or URL for employees to access resources appropriate to the sales stage:

**a** In the Useful Resources title bar, click Add Attachment or Add URL.

**b** On the Attachment Edit or URL Edit page, enter the information.

**c** Save the record.

When employees click the Coach button from their opportunity records, the list of attachments or URLs linked to this sales stage appears on their Sales Process Coach page.

**9** To define tasks that are automatically created when employees update the sales stage:

**a** In the Automated Tasks title bar, click New.

**b** On the Automated Tasks Edit page, enter the information.

The information you set up here serves as a template for each task. The newly-created task is linked to this opportunity, so it appears on the Opportunity Detail page as well as the appropriate activity lists.

**NOTE:** You must enter a number in the Due Date field to indicate how many days after the task is created that the task is due. For example, if the task is created on December 6 and you entered 10 here as the Due Date, the task appears on the employee's task lists as due on December 16.

For Owner, the following behavior applies:

- The task is created for every user having the role you select.
- If no user fulfills the account team role, the task is assigned to the opportunity owner.

**NOTE:** For information about how record ownership modes affect the ownership of automatically generated tasks, see [Record Ownership Modes and Automatically Generated Tasks](#) (on page 227).

**c** Save the record.

## Customizing Your Company's Industry List

Industry is a picklist field on account records. It is used to track the business type of the account. You can add and remove industries, or change the display name of industries on the list. This allows you to adjust the industry picklist to match the nomenclature familiar to your company.

**NOTE:** The number of industries that you can add to the list is not limited.

### *To customize your company's industry list*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Industry Definition section, click the Industry Definition link.
- 4 From the Translation Language drop-down list, select your company's primary language.  
If you do not select your company's primary language, the Mark for Translation check box does not appear, and the application does not indicate untranslated terms you add here.
- 5 On the Industry Edit page, fill in the information.  
**NOTE:** The Industry SIC Code is one of the fields on the Industry Edit page. The Standard Industrial Classification (SIC) system is a series of numeric codes that classify all businesses by the types of products or services they make available. Businesses engaged in the same activity, whatever their size or type of ownership, are assigned the same SIC code. The SIC codes were developed to facilitate the collection, tabulation, and analysis of data, and to promote comparability in statistical analyses.
- 6 To manually enter the translated equivalent of the new industry:
  - a From the Translation Language drop-down list, select the language.
  - b Enter the translated equivalent in the Display Name field and click Save.
- 7 Save the record.

## Data Management Tools

From the Data Management Tools section of the Admin Homepage, you can perform the following tasks:

- Import and export your company data. For more information, see [Import and Export Tools](#) (on page 351).
- View batch delete requests. For more information, see [Batch Delete Queue Page](#) (on page 562).
- View batch book assignment requests. For more information, see [Batch Assign Book Queue Page](#) (on page 562).
- Create and administer the integration event queues. For more information, see [About Integration Events](#) (on page 563).

## Import and Export Tools

Several utilities are available from the Import and Export Tools page, which augment the import and export facilities in Oracle CRM On Demand:

- **Import Assistant.** For more information, see [Import Assistant](#) (on page 532).
- **Oracle Data Loader On Demand.** For more information, see [Oracle Data Loader On Demand Client Utility](#) (on page 542).

■ **Oracle Migration Tool On Demand.** For more information, see [Oracle Migration Tool On Demand Client Utility](#) (on page 547).

■ **Oracle Web Services.** For more information, see [Web Services Integration](#) (on page 543).

For more information about choosing an appropriate import method, see 1089184.1 (Article ID) on My Oracle Support.

The import process consists of these steps:

■ [Preparing for Data Importing](#) (on page 394)

■ [Importing Your Data](#) (on page 533)

■ [Reviewing Import Results](#) (on page 537)

You can also export data from Oracle CRM On Demand to CSV files. For information about exporting, click a topic:

■ [Exporting Your Data](#) (on page 539)

■ [Reviewing Export Results](#) (on page 541)

### Before you begin:

■ To import data, your role must include either the Administration Import privilege or the Marketing Import privilege. The Administration Import privilege lets you import all record types, whereas the Marketing Import privilege lets you import only accounts, contacts, and leads.

■ If a user wants to import up to 2000 contacts, you must enable the Personal Import privilege for the user's role. The Personal Import privilege provides greater control over a user's data imports. For more information on roles, see [Adding Roles](#) (on page 210).

■ Review this entire section as well as the tutorial lessons on importing records, which provide additional information for performing imports (best practices).

**CAUTION:** You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5-10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on data importing or contact Customer Care. For information on those resources, click the Training and Support link at the top of each page within Oracle CRM On Demand.

■ To export data, your role must include the Administration Export privilege.

You can import data from comma-separated value (CSV) files to automatically create records in Oracle CRM On Demand. Each CSV file must be less than 20 MB in size. To reduce the file size, either divide the records into several files, or reduce the data by deleting the columns that you do not want to import. You can view a sample CSV file in Oracle Data Loader On Demand Guide.

This table describes what types of records you can create by importing data and how many records you can import each time that you run the import process.

Record Type	Record Limit for Each Import
Account	30000
Account Team	50000
Address	30000



Record Type	Record Limit for Each Import
Appointment	30000
Appointment Contact	50000
Appointment User	50000
Asset	80000
Contact (Admin)	30000
Contact Team	50000
Campaign	50000
Campaign Recipient	50000
Deal Registrations	30000
Lead	30000
Note	50000
Order	30000
Order Item	30000
Opportunity	30000
Opportunity Contact Role	50000
Opportunity Product	80000
Product	80000
Product Category	30000
Property	30000
Solution	50000
Service Request	30000
Task	30000
Task Contact	50000
Task User	50000
User	500
Vehicle Contact	50000

Depending on the industry-specific solutions you have implemented, the following records can be made available to import:

Record Type	Record Limit for Each Import
-------------	------------------------------

Record Type	Record Limit for Each Import
Allocation	30000
Application	30000
Business Plan	30000
Claim	30000
Contact State License	30000
Coverage	30000
Custom Objects	30000
Damage	30000
Dealer	80000
Deal Registration	30000
Financial Account	30000
Financial Account Holder	30000
Financial Account Holding	30000
Financial Plan	30000
Financial Product	30000
Financial Transaction	30000
Inventory Audit Report	30000
Inventory Period	30000
Involved Party	30000
Insurance Property	30000
MDF Request	30000
Messaging Plan	30000
Messaging Plan Item	30000
Messaging Plan Item Relation	30000
Message Response	30000
Objective	30000
Partner	30000
Plan Account	30000
Plan Contact	30000

Record Type	Record Limit for Each Import
Plan Opportunity	30000
Policy	30000
Policy Holder	30000
Portfolio	30000
Price List	30000
Price List Line Item	30000
Sample Disclaimer	30000
Sample Inventory	30000
Sample Lot	30000
Sample Transaction	30000
Signature	30000
Special Pricing Product	30000
Special Pricing Request	30000
Transaction Item	30000
Vehicle	80000

## About Countries and Address Mapping

The following table shows:

- Picklist values for the Country field in Oracle CRM On Demand

The picklist values for the Country field in Oracle CRM On Demand cannot be edited. To capture all the data when importing your files, make sure your countries match the permissible names exactly, including punctuation and capitalization. Otherwise, the information is not imported.

**NOTE:** Because the Country picklist values have a 30-character limit, some names that exceed that limit are truncated in the picklist.

- Mappings for addresses per country

When importing your data, you need to set up columns for each of the nine address fields that Oracle CRM On Demand uses. The following table shows how you want to map the address fields for each

## Administering Oracle CRM On Demand

country to the appropriate fields within Oracle CRM On Demand. Mapping correctly ensures that you capture all the data in your files under the correct fields in the application.

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box Sorting
USA	8	Number/ Street	Address 2	Address 3	City	County	US State	Zip		
Afghanistan	6	Address 1	Address 2		City			Post Code	Province	
Albania	6	Address 1	Address 2		City			Post Code	Province	
Algeria	5	Number/ Street	Address 2		City			Post Code		
American Samoa	6	Address 1	Address 2		City			Post Code	Province	
Andorra	5	Number/ Street	Address 2		City			Post Code		
Angola	4	Street/ Number	Address 2		City					
Anguilla	6	Address 1	Address 2		City			Post Code	Province	
Antigua and Barbuda	4				City				Island	PO Box
Argentina	5	Number/ Street	Address 2		City			Post Code	Province	
Armenia	5	Street/ Number	Address 2		City			Post Code		
Aruba	5	Number/ Street	Address 2	Floor	City					
Ascension Island	5	Address 1	Address 2		City			Post Code	Province	
Australia	6	Number/ Street	Address 2		City			Zip	State	
Austria	5	Street/ Number	Address 2		City			Post Code		
Azerbaijan	5	Street/ Number	Address 2		City			Post Code		
Bahamas	6	Address 1	Address 2		City			Island Code	Island	

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Bahrain	5	Number/ Street	Address 2		City			Post Code		
Bangladesh	5	Street/ Number	Address 2		City			Post Code		
Barbados	6	Address 1	Address 2		City			Post Code	Province	
Belarus	6	Street/ Number	Address 2		City			Post Code		Sorting C
Belgium	6	Street/ Number	Address 2		City			Post Code		Sorting C
Belize	5	Number/ Street	Address 2	Floor	City					
Benin	4				City			Boite Postale		Sorting C
Bermuda	5	Number/S treet	Address 2		City			Post Code		
Bhutan	6	Address 1	Address 2		City			Post Code	Province	
Bolivia	4	Street/ Number	Address 2		City					
Bosnia and Herzegovina	5	Street/ Number	Address 2		City			Post Code		
Botswana	3				City					PO Box
Bouvet Island	6	Address 1	Address 2		City			Post Code	Province	
Brazil	7	Street/ Number	Address 2	Floor	City			Post Code	Province	
British Indian Ocean Territory	6	Address 1	Address 2		City			Post Code	Province	
Brunei Darussalam	5	Number/ Street	Address 2		City			Post Code		
Bulgaria	5	Street/ Number	Address 2		City			Post Code		
Burkina Faso	4				City			Boite Postale		Sorting C
Burundi	3				City					PO Box

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Cambodia	6	Address 1	Address 2		City			Post Code	Province	
Cameroon	3				City					PO Box
Canada	6	Number/ Street	Address 2		City			Post Code	Province	
Cape Verde	4	Street/ Number	Address 2		City					
Cayman Island	6	Address 1	Address 2		City			Post Code	Province	
Central African Republic	3				City					PO Box
Chad	3				City					PO Box
Channel Islands	5	Address 1	Address 2		City			Post Code	Province	
Chile	6	Street/ Number	Address 2	Floor	City			Post Code	Province	
China	5	Number/ Street	Address 2		City			Post Code		
Christmas Island	6	Address 1	Address 2		City			Post Code	Province	
Cocos (Keeling) Islands	6	Address 1	Address 2		City			Post Code	Province	
Colombia	7	Street/ Number	Address 2	Floor	City				Province	Sorting C
Comoros	3				City					PO Box
Congo	3	Street/ Number			City					
Congo, The Democratic Republic	4				City			Boite Postale		Sorting C
Cook Islands	6	Address 1	Address 2		City			Post Code	Province	
Costa Rica	6	Street/ Number	Address 2	Floor	City			Post Code		
Croatia	4	Street/ Number	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Cuba	4	Street/ Number			City			Codiga Postal		
Curacao	5	Address 1	Address 2		City			Post Code	Province	
Cyprus	5	Number/ Street	Address 2		City			Post Code		
Czech Republic	6	Street/ Number	Address 2		City			Post Code		Sorting C
Denmark	6	Street/ Number	Address 2		City			Post Code		Sorting C
Djibouti	3				City					PO Box
Dominica	6	Address 1	Address 2		City			Post Code	Province	
Dominican Republic	5	Number/ Street	Address 2		City			Post Code		
East Timor	5	Street/ Number	Address 2		City			Post Code		
Ecuador	5	Address 1		Floor	City			Post Code	Province	
Egypt	6	Address 1		District	City			Post Code	Province	
El Salvador	5	Street/ Number			City			Post Code	Province	
Equatorial Guinea	3				City					PO Box
Eritrea	3	Street/ Number			City					
Estonia	5	Street/ Number	Address 2		City			Post Code		
Ethiopia	3				City					PO Box
Falkland Islands (Malvinas)	3	Street/ Number			City					
Faroe Islands	6	Address 1	Address 2		City			Post Code	Province	
Fiji	5	Number/ Street	Address 2	Floor	City					
Finland	6	Street/ Number	Address 2		City			Post Code		Sorting C

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
France	5	Number/ Street	Address 2		City			Post Code		
French Guiana	5	Number/ Street	Address 2		City			Post Code		
French Polynesia	5	Number/ Street	Address 2		City			Post Code		
French Southern Territories	5	Number/ Street	Address 2		City			Post Code		
Gabon	3				City					PO Box
Gambia	3	Street/ Number			City					
Georgia	5	Number/ Street	Address 2		City			Post Code		
Germany	5	Street/ Number	Address 2		City			Post Code		
Ghana	3				City					PO Box
Gibraltar	3	Street/ Number			City					
Greece	5	Street/ Number	Address 2		City			Post Code		
Greenland	5	Street/ Number	Address 2		City			Post Code		
Grenada	6	Address 1	Address 2		City			Post Code	Province	
Guadeloupe	6	Address 1	Address 2		City			Post Code	Province	
Guam	6	Address 1	Address 2		City			Post Code	Province	
Guatemala	4	Street/ Number			City			Codiga Postal		
Guinea	3				City					PO Box
Guinea-bissau	4	Street/ Number			City			Codiga Postal		
Guyana	6	Address 1	Address 2		City			Post Code	Province	
Haiti	6	Street/ Number	Address 2		City			Post Code		Sorting C



Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
		Number								
Heard and Mc Donald Islands	6	Address 1	Address 2		City			Post Code	Province	
Holy See (Vatican City State)	6	Street/ Number	Address 2		City			Post Code		Sorting C
Honduras	7	Street/ Number	Address 2	Floor	City			Post Code	Province	
Hong Kong	7	Number/ Street	Address 2	District	City				Part of Territory	Address 4
Hungary	5	Street/ Number	Address 2		City			Post Code		
Iceland	5	Street/ Number	Address 2		City			Post Code		
India	5	Number/ Street	Address 2		City			Post Code		
Indonesia	5	Street/ Number	Address 2		City			Post Code		
Iran (Islamic Republic of)	5	Number/ Street	Address 2		City			Post Code		
Iraq	6	Address 1	Address 2		City			Post Code	Province	
Ireland	6	Number/ Street	Address 2	Address 3	City					County
Israel	5	Number/ Street	Address 2		City			Post Code		
Italy	6	Street/ Number	Address 2		City			Post Code	Province	
Ivory Coast	4				City			Boite Postale		Sorting C
Jamaica	6	Number/ Street	Address 2		City				Parish	Sorting C
Japan	6	Chome	Ku		Chi/ Gun			Post Code	Prefecture	
Jordan	5	Number/ Street	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Kazakhstan	4	Address 1			City			Post Code		
Kenya	4				City			Post Code		PO Box
Kirbati	4	Address 1			City				Island	
Korea	6	Address 1	Address 2		City			Post Code	Province	
Kosovo	6	Street/Nu mber	Address 2	District	City			Post Code		
Korea, Democratic People's Rep	6	Address 1	Address 2		City			Post Code	Province	
Kuwait	5	Street/ Number	Address 2		City			Post Code		
Kyrgyzstan	6	Street/ Number	Address 2		City			Post Code		Sorting C
Laos	5	Number/ Street	2		City			Post Code	Province	
Latvia	5	Street/ Number			City			Post Code		Sorting C
Lebanon	6	Address 1	Address 2		City			Post Code	Province	
Lesotho	3				City					PO Box
Liberia	6	Street/ Number	Address 2		City			Post Code		Sorting C
Libyan Arab Jamahiriya	6	Address 1	Address 2		City			Post Code	Province	
Liechtenstein	5	Street/ Number	Address 2		City			Post Code		
Lithuania	4	Street/ Number			City			Codigo Postal		
Luxembourg	5	Number/ Street	Address 2		City			Post Code		
Macau	6	Address 1	Address 2		City			Post Code	Province	
Macedonia, The Former Yugoslav	6	Street/ Number	Address 2		City			Post Code		Sorting C

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Madagascar	5	Street/ Number	Address 2		City			Post Code		
Malawi	3				City					PO Box
Malaysia	5	Number/ Street	Address 2		City			Post Code		
Maldives	5	Number/ Street	Address 2		City			Post Code		
Mali	5	Number/ Street	Address 2	Floor	City					
Malta	6	Number/ Street	Address 2		City			Post Code	Island	
Marshall Islands	6	Number/ Street	Address 2		City			Zip	State	
Martinique	5	Number/ Street	Address 2		City			Post Code		
Mauritania	3				City					PO Box
Mauritius	3	Street/ Number			City					
Mayotte	5	Number/ Street	Address 2		City			Post Code		
Mexico	8	Street/ Number	Address 2	Floor	City			Post Code	State	Colonia/S n
Micronesia, Federated States of	6	Address 1	Address 2		City			Post Code	Province	
Moldova, Republic of	5	Street/ Number	Address 2		City			Post Code		
Monaco	5	Number/ Street	Address 2		City			Post Code		
Mongolia	5	Street/ Number	Address 2		City			Post Code		
Montenegro	5	Address 1	Address2		City			Post Code	Province	
Montserrat	6	Address 1	Address 2		City			Post Code	Province	
Morocco	5	Number/	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
		Street								
Mozambique	4	Street/ Number			City			Codigo Postal		
Myanmar	5	Address 1			City			Post Code		Township
Namibia	3				City					PO Box
Nauru	3			District						PO Box
Nepal	5	Street/ Number	Address 2		City			Post Code		
Netherlands	5	Street/ Number	Address 2		City			Post Code		
Netherlands Antilles	5	Address 1	Address 2		City				Island	
New Caledonia	5	Number/ Street	Address 2		City			Post Code		
New Zealand	5	Number/ Street	Address 2		City			Post Code		
Nicaragua	5	Street/ Number	Address 2		City			Post Code		
Niger	3				City					PO Box
Nigeria	6	Address 1	Address 2		City			Post Code	Province	
Niue	3				City					PO Box
Norfolk Island	6	Number/ Street	Address 2		City			Zip	State	
Northern Mariana Islands	6	Number/ Street	Address 2		City			Zip	State	
Norway	6	Street/ Number	Address 2		City			Post Code		Sorting C
Oman	4							Post Code	Region	PO Box
Pakistan	6	Number/ Street	Address 2	Address 3	City			Post Code		
Palau	6	Number/ Street	Address 2		City			Zip	State	

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Palestinian Authority	6	Address 1	Address 2		City			Post Code	Province	
Panama	5	Address 1			City				Province	Sorting C
Papua New Guinea	3				City				Province	
Paraguay	4	Street/ Number	Address 2		City					
Peru	5	Street/ Number	Address 2		City					Sorting C
Philippines	7	Street/ Number	Address 2	District	City			Post Code	Province	
Pitcairn	1									
Poland	4	Street/ Number			City			Codigo Postal		
Portugal	6	Street/ Number	Address 2	Floor	City			Post Code		
Puerto Rico	5	Address 1			City			Post Code		URB
Qatar	3				City					PO Box
Reunion	5	Number/ Street	Address 2		City			Post Code		
Romania	5	Street/ Number	Address 2		City			Post Code		
Russian Federation	6	Street/ Number	Address 2		City			Post Code		Sorting C
Rwanda	3				City					PO Box
Samoa	5	Number/ Street	Address 2		City			Zip	State	
San Marino	6	Street/ Number	Address 2		City			Post Code		Sorting C
Sao Tome and Principe	5	Number/ Street	Address 2	Floor	City					
Saudi Arabia	5	Number/ Street	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Senegal	3	Street/ Number			City					
Serbia	6	Address 1	Address 2		City			Post Code	Province	
Seychelles	4				City				Island	PO Box
Sierra Leone	5	Number/ Street	Address 2	Floor	City					
Singapore	5	Street/ Number	Address 2		City			Post Code		
Slovakia (Slovak Republic)	6	Street/ Number	Address 2		City			Post Code		Sorting C
Slovenia	5	Street/ Number	Address 2		City			Post Code		
Solomon Islands	5				City			Island Code	Island	PO Box
Somalia	6	Address 1	Address 2		City			Post Code	Province	
South Africa	5	Number/ Street	Address 2		City			Post Code		
South Georgia and the Sandwich Isles	6	Address 1	Address 2		City			Post Code	Province	
Spain	7	Street/ Number	Address 2	Floor	City			Post Code	Province	
Sri Lanka	5	Number/ Street	Address 2		City			Post Code		
St. Barts	5	Number/ Street	Address 2		City			Post Code		
St. Helena	6	Address 1	Address 2		City			Post Code	Province	
St. Kitts and Nevis	5	Address 1	Address 2		City				Island	
St. Lucia	5	Number/ Street	Address 2	Floor	City					
St. Martin	5	Number/ Street	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/Sorting
St. Pierre and Miquelon	5	Number/ Street	Address 2		City			Post Code		
St. Vincent and the Grenadines	4	Number/ Street	Address 2	Floor	City					
Sudan	4				City			Post Code		PO Box
Suriname	3	Street/ Number			City					
Svalbard and Jan Mayen Islands	6	Address 1	Address 2		City			Post Code	Province	
Swaziland	4				City			Post Code		PO Box
Sweden	5	Street/ Number	Address 2		City			Post Code		
Switzerland	5	Street/ Number	Address 2		City			Post Code		
Syrian Arab Republic	3	Street/ Number			City					
Taiwan	5	Number/ Street	Address 2		City			Post Code		
Tajikistan	5	Street/ Number	Address 2		City			Post Code		
Tanzania, United Republic of	3				City					PO Box
Thailand	7	Address 1	Address 2	Address 3	City			Post Code	Province	
Togo	3				City					PO Box
Tokelau	6	Address 1	Address 2		City			Post Code	Province	
Tonga	4				City				Island	PO Box
Trinidad and Tobago	5	Number/ Street	Address 2	Floor	City					
Tunisia	5	Street/ Number	Address 2		City			Post Code		
Turkey	5	Street/ Number	Address 2		City			Post Code		

Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/ Sorting
Turkmenistan	4	Number/ Street			City			Post Code		
Turks and Caicos Islands	6	Address 1	Address 2		City			Post Code	Province	
Tuvalu	4				City				Island	PO Box
Uganda	3				City					PO Box
Ukraine	5	Address 1	Address 2		City			Post Code		
United Arab Emirates	3								Emirate	PO Box
United Kingdom	7	Number/ Street	Address 2		City			Post Code		County
United States Minor Outlying I	6	Address 1	Address 2		City			Post Code	Province	
Uruguay	5	Number/ Street	Address 2		City			Post Code		
Uzbekistan	6	Address 1	Address 2		City			Post Code	Oblast	
Vanuatu	3				City					PO Box
Venezuela	6	Street/ Number	Address 2		City			Post Code	Province	
Vietnam	5	Number/ Street	Address 2		City			Post Code		
Virgin Islands (British)	6	Address 1	Address 2		City			Post Code	Province	
Virgin Islands (U.S.)	6	Number/ Street	Address 2		City			Zip	State	
Wallis and Futuna Islands	6	Address 1	Address 2		City			Post Code	Province	
Western Sahara	5	Number/ Street	Address 2		City			Post Code		
Yemen	3	Street/ Number			City					
Zambia	5	Number/ Street	Address 2		City			Post Code		



Country (Uneditable Values)	No. of Fields	Address 1	Address2	Address3	City	Count y	US State	Zip/Post Code	Province	PO Box/Sorting
Zimbabwe	5	Number/Street	Address 2	Floor	City					

## Valid State/Territory Abbreviations for USA

This table shows the picklist values for USA.

Abbreviations	Complete Names
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida
GA	Georgia
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland

Abbreviations	Complete Names
ME	Maine
MI	Michigan
MN	Minnesota
MO	Missouri
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia

Abbreviations	Complete Names
WY	Wyoming

## Valid Mailing Codes for USA

This table shows the three, official state-codes for U.S. military mail recipients.

Abbreviations	Description
AE (ZIP codes 09xxx)	Armed Forces Europe. This term includes Canada, Middle East, and Africa.
AK (ZIP codes 962xx - 966xx)	Armed Forces Pacific.
AA (ZIP codes 340xx)	Armed Forces Americas. This term includes Central and South America.

## Valid Province/Territory Abbreviations for Canada

This table shows the official abbreviations for Canadian provinces (text fields).

Abbreviations	Complete Names
AB	Alberta
BC	British Columbia
MB	Manitoba
NB	New Brunswick
NF	Newfoundland and Labrador
NS	Nova Scotia
NT	Northwest Territories
NU	Nunavut
ON	Ontario
PE	Prince Edward Island
QC	Quebec
SK	Saskatchewan
YT	Yukon

## About Record Duplicates and External IDs

When you import records, you can choose to handle duplicate records in these ways:

- By not importing the duplicate ones
- By overwriting the existing ones

**NOTE:** The overwriting option is not available when you import Tasks, Appointments, and Notes. New records are always created for these record types.

- By creating additional records for the duplicates (Contacts and Leads only)

If you choose to overwrite existing records when you import your data, Oracle CRM On Demand checks whether the record in your import file is a duplicate of an existing record in Oracle CRM On Demand by checking the values in the fields that are used to check for duplicate records. If your record is a duplicate, Oracle CRM On Demand updates the fields on the existing record in Oracle CRM On Demand with the values from the record that you import, with the exception of the fields that are used to check for duplicate records.

On many record types, you can use either the External ID field or a predefined set of fields to check if the record in your import file is a duplicate of an existing record in Oracle CRM On Demand. If you use the External ID as the field to check for duplicate records, then when a duplicate record is found, all of the fields on the record in Oracle CRM On Demand are updated, with the exception of the External ID field. Similarly, if you use the predefined set of fields to check for duplicate records, all fields other than the duplicate-checking fields are updated on the record in Oracle CRM On Demand.

For example, on the Account record type, you can use the External ID field, or a combination of the Account Name and Location fields to check for duplicate records. If the record in your file is a duplicate record, the existing record in Oracle CRM On Demand is updated with the data from your import file as follows:

- If you used the External ID field to check for duplicates, all fields other than the External ID field are updated on the record in Oracle CRM On Demand.
- If you used the Account Name and Location fields to check for duplicate records, all fields other than the Account Name and Location fields are updated on the record in Oracle CRM On Demand.

### To update records

- 1 Set up your import CSV file with a column for the External ID codes, or for all of the duplicate checking fields for the record type.
- 2 Make sure that the External ID codes or the duplicate checking field values are exactly the same as the values for the existing records. If you are using External ID codes, each one must be unique in the system for the update to work.
- 3 Include at least all required fields in your import CSV file.
- 4 Select the Overwrite Existing Records option in Step 1 of the import assistant.
- 5 Make sure that you map the External ID field or all of the duplicate checking fields in the Field Mapping step of the import assistant.

## 6 Complete all of the import assistant steps to import the data.

When you use the import assistant to update records, only fields that you map in the Field Mapping step are overwritten. Therefore, if you have fields that do not need to be updated, and they are not required for duplicate checking, you do not have to map those fields.

If External IDs exist and you have mapped them during the import process, the application uses them to determine if a record is a duplicate. When importing other record types, you can use those External IDs as references so that the associations are carried over to Oracle CRM On Demand.

For example, if you have an `account_id` column in your `account.csv` file, you want to map it to the External Unique ID. When importing contacts, if your `contacts.csv` file contains a `contact_id` column (the unique ID for the contact) and an `account_id` column (a reference to the IDs in the `account.csv` file), you should map the `contact_id` to External Unique ID and `account_id` to Account External ID. During the import process, the application checks the `account_id` field in each contact record to determine the existing account and link the account to the contact.

If no External IDs exist or you do not map External IDs in your file to the External ID fields in the application, the application determines duplicates by comparing certain fields. The following table lists the fields that are used to determine record duplicates.

Records of This Type	Are Duplicates If These Fields Match
Book User	<ul style="list-style-type: none"> <li>■ Book ID, Book External ID, or Book Name if you are identifying existing books</li> <li>■ User Sign In ID, User External ID, or User ID if you are identifying book users within the book:</li> </ul>
User	<ul style="list-style-type: none"> <li>■ User ID OR</li> <li>■ External ID (Created by another software system) OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Account	<ul style="list-style-type: none"> <li>■ Account Name and Location OR</li> <li>■ External ID (Created by another software system) OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Account Book	<ul style="list-style-type: none"> <li>■ Account: Name and Account: Location if you are identifying accounts OR</li> <li>■ Account: External ID if you are identifying accounts OR</li> <li>■ Account: Id if you are identifying accounts</li> <li>■ Name, Book External ID, or Book ID if you are identifying books</li> </ul>

Records of This Type	Are Duplicates If These Fields Match
Account Team	Account (Account Name or Account External ID) and User (User ID)
Contact	<ul style="list-style-type: none"> <li>■ First Name, Last Name, Work Phone #, and Email</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul> <p><b>NOTE:</b> Oracle CRM On Demand does not check for duplicate records when contacts are created through the user interface.</p>
Contact Book	<ul style="list-style-type: none"> <li>■ Contact:Id or Contact:External ID if you are identifying contacts</li> <li>■ Name, Book External ID, or Book ID if you are identifying books</li> </ul>
Contact Team	Contact (Contact Name or Contact External ID) and User (User ID)
Product Category	<ul style="list-style-type: none"> <li>■ Category Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Product	<ul style="list-style-type: none"> <li>■ Product Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>■ Opportunity Name and Account (Account Name or Account External ID)</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Opportunity Contact Role	Opportunity Name and Contact Full Name
Opportunity Product Revenue	<p>External ID (Created by another software system)</p> <p><b>NOTE:</b> Oracle CRM On Demand does not check for duplicate records when opportunity product revenue records are created through the user interface.</p>

Records of This Type	Are Duplicates If These Fields Match
Campaign	<ul style="list-style-type: none"> <li>■ Source Code</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Campaign Recipient	<p>Campaign (Campaign External ID or Campaign ID), Contact (Contact Full Name or Contact External ID), Source Code</p> <p><b>NOTE:</b> You must provide either Contact Full Name or Contact External ID, but not both.</p>
Lead	<ul style="list-style-type: none"> <li>■ First Name, Last Name, Company, Primary Phone #, and Email</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul> <p><b>NOTE:</b> Oracle CRM On Demand does not check for duplicate records when leads are created through the user interface.</p>
Service Request	<ul style="list-style-type: none"> <li>■ SR Number</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Solution	<ul style="list-style-type: none"> <li>■ Title</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Task	No duplicate checking (Always creates new records)
Task Contact	Task External ID, Contact (Contact External ID or Contact Full Name)
Task User	Task External ID, User (User Sign In ID or User External ID)
Appointment	No duplicate checking (Always creates new records)
Appointment Contact	Appointment External ID, Contact (Contact External ID or Contact Full Name)
Appointment User	Appointment External ID, User (User Sign In ID or User External ID)

Records of This Type	Are Duplicates If These Fields Match
Note	No duplicate checking (Always creates new records)
Asset	External ID (Created by another software system)
Custom Objects 01, 02, 03	External ID (Created by another software system) <b>NOTE:</b> Oracle CRM On Demand does not check for duplicate records when custom object records are created through the user interface.
Custom Objects 04 and higher	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul> <b>NOTE:</b> Oracle CRM On Demand does not check for duplicate records when custom object records are created through the user interface.
Portfolio	<ul style="list-style-type: none"> <li>■ Account Number and Product</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Dealer	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Vehicle	<ul style="list-style-type: none"> <li>■ VIN</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Vehicle Contact	Vehicle and Contact



Records of This Type	Are Duplicates If These Fields Match
Financial Account	<ul style="list-style-type: none"> <li>■ Financial Account</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Financial Account Holding	<ul style="list-style-type: none"> <li>■ Financial Account Holdings Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Financial Plan	<ul style="list-style-type: none"> <li>■ Financial Plan Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Financial Account Holder	<ul style="list-style-type: none"> <li>■ Financial Account Holder Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Insurance Property	<ul style="list-style-type: none"> <li>■ Type</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Financial Transaction	<ul style="list-style-type: none"> <li>■ Transaction ID</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>

Records of This Type	Are Duplicates If These Fields Match
Financial Product	<ul style="list-style-type: none"> <li>■ Financial Product Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Coverage	<ul style="list-style-type: none"> <li>■ Coverage Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Claim	<ul style="list-style-type: none"> <li>■ Claim Number</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Policy	<ul style="list-style-type: none"> <li>■ Policy Number</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Policy Holder	<ul style="list-style-type: none"> <li>■ Policy Holder Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Involved Party	<ul style="list-style-type: none"> <li>■ Involved Party Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>

Records of This Type	Are Duplicates If These Fields Match
Damage	<ul style="list-style-type: none"> <li>■ Damage Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Partner	<ul style="list-style-type: none"> <li>■ Partner Name and Location</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Partner Program	<ul style="list-style-type: none"> <li>■ Partner Program Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Special Pricing Request <b>NOTE:</b> In the import assistant, this record type is shown as SP Request.	<ul style="list-style-type: none"> <li>■ Request Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Application	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Deal Registration	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>

Records of This Type	Are Duplicates If These Fields Match
Price List	<ul style="list-style-type: none"> <li>■ Price List Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Allocation	<ul style="list-style-type: none"> <li>■ User Detail</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Broker Profile	<ul style="list-style-type: none"> <li>■ Broker Profile Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Accreditation	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Exam Registration	<ul style="list-style-type: none"> <li>■ Id</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
MDF Request	<ul style="list-style-type: none"> <li>■ Request Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>

Records of This Type	Are Duplicates If These Fields Match
Course	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Exam	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Messaging Plan Item	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Certification	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Course Enrollment	<ul style="list-style-type: none"> <li>■ Id</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Sample Inventory	<ul style="list-style-type: none"> <li>■ Relationship Code</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>

Records of This Type	Are Duplicates If These Fields Match
Inventory Period	<ul style="list-style-type: none"> <li>■ Start Date</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Plan Account	<ul style="list-style-type: none"> <li>■ Relationship Code</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Objective	<ul style="list-style-type: none"> <li>■ Objective Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Certification Request	<ul style="list-style-type: none"> <li>■ Id</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Sample Lot	<ul style="list-style-type: none"> <li>■ Lot #</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Transaction Item	<ul style="list-style-type: none"> <li>■ Sample</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>

Records of This Type	Are Duplicates If These Fields Match
Sample Transaction	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Contact State License	<ul style="list-style-type: none"> <li>■ License Number</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Business Plan	<ul style="list-style-type: none"> <li>■ Plan Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Inventory Audit Report	<ul style="list-style-type: none"> <li>■ Reported Date</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Special Pricing Product	<ul style="list-style-type: none"> <li>■ Item Number</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul> <p><b>NOTE:</b> Oracle CRM On Demand does not check for duplicate records when special pricing product records are created through the user interface.</p>

Records of This Type	Are Duplicates If These Fields Match
Plan Opportunity	<ul style="list-style-type: none"> <li>■ Opportunity</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Sample Disclaimer	<ul style="list-style-type: none"> <li>■ Relationship Code</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Accreditation Request	<ul style="list-style-type: none"> <li>■ Id</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Messaging Plan Item Relations	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Messaging Plan	<ul style="list-style-type: none"> <li>■ Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>
Plan Contact	<ul style="list-style-type: none"> <li>■ Contact Full Name</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>



Records of This Type	Are Duplicates If These Fields Match
Price List Line Item	<ul style="list-style-type: none"> <li>■ LineItem</li> <li>OR</li> <li>■ External ID (Created by another software system)</li> <li>OR</li> <li>■ Row ID (Oracle CRM On Demand internal ID)</li> </ul>

**CAUTION:** When updating files, it is recommended that you map either the External ID or the other set of fields for determining duplicates; if you map both of them, you risk overwriting fields used for duplicate checking that you might not want to overwrite. For example, if you map the External ID, Account Name, and Location when updating account records, and a duplicate is found based on the External ID, the Account Name and Location overwrite the existing values in the database. If no duplicates are found based on the External ID, the system checks for duplicates based on Account Name and Location, and if found, overwrites the External ID in the database.

## Account Import and External ID Summary

When importing accounts, you specify how you want the application to handle duplicate records:

- **Don't Import Duplicate Records**

If duplicates are found, the duplicate record is not imported.

- **Overwrite Existing Records**

If duplicates are found, the existing record is updated. If more than one duplicate is found, then no records are inserted or updated.

After selecting the behavior, you have the option of mapping fields, including these two external IDs available with account imports:

- **External Unique ID.** Refers to the external ID of the current record to be imported. The External Unique ID is directly involved in duplicate checking, as described in this section.

- **Parent Account External ID.** References the external ID of the parent record for the current record.

The behavior surrounding each of these external IDs is independent of each other.

### Scenarios for External Unique IDs

#### Scenario A - External Unique ID is not mapped

Duplicate checking is based on Account Name and Location. If a duplicate is found, the behavior is determined by the selected duplicate checking option.

#### Scenario B - External Unique ID is mapped

Import first tries to find a duplicate record using the External Unique ID.

- **Scenario B1 - Single Duplicate External ID Found**

Account Name and Location are checked for duplicates outside of the currently matched record, and if a duplicate is found, no records are updated or inserted.

If the duplicate checking option is set to Overwrite Existing Records, then the record is updated (including Account Name and Location).

If the duplicate checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- **Scenario B2 - Multiple Duplicate External IDs Found**

No Records are inserted or updated.

- **Scenario B3 - No Duplicate External ID Found**

Import now checks duplicates based on the Account Name and Location.

- **Scenario B3a - No Duplicate Account Name and Location Found.**  
Record is inserted.

- **Scenario B3b - Single Duplicate Account Name and Location Found**  
If the duplicate checking option is set to Overwrite Existing Records, the record is updated, *including the External Unique ID*. If the duplicate checking option is set to Don't Import Duplicate Records, no records are updated.

- **Scenario B3c - Multiple Duplicate Account Name and Locations Found**  
No records are inserted or updated.

### **Scenario C - External Unique ID is not Mapped**

The Account Name and Location are used to perform duplicate checking.

- **Scenario C1 - Single Duplicate Account Name and Location found**

If Duplicate Checking option is set to Overwrite Existing Records, then the record is updated.

If Duplicate Checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- **Scenario C2 - Multiple Duplicate Account Name and Location found.**

No records are updated or inserted.

- **Scenario C3 - No Duplicate Account Name and Location found**

Record is inserted.

### **Scenarios for Parent Account External IDs**

The Parent Account External ID is only used to set the associated Parent Account Record. It has no impact on duplicate checking or updates.

#### **Scenario A - Parent Account External ID is Mapped**

Import uses the Parent Account External ID *only* to determine the Parent Account.

- **Scenario A1- Multiple records match Parent Account External ID**

Parent Account is not set.

- **Scenario A2 - Single Record matches Parent Account External ID**

Parent Account is set.

- Scenario A3 - No records match the Parent Account External ID

Parent Account is not set.

### **Scenario B - Parent Account External ID is not Mapped**

Import uses the Parent Account Name and Parent Account Location to determine the Parent Account.

- Scenario B1 - Multiple records match Parent Account Name and Parent Location.

Parent Account is not set.

- Scenario B2 - Single Record matches Parent Account Name and Parent Location

Parent Account is set.

- Scenario B3 - No records match the Parent Account Name and Parent Location

Parent Account is not set.

## **Linking Records During Import**

When you import records, you may want to link them to existing records in the database. For example, you might link a contact record (John Smith) to an account record (Smith Auto Repair).

A record must already exist in the database before you can link another record to it during import. Therefore, when you have more than one type of record to import, it is best to import them in the order in which they appear on the Import and Export Tools page. For example, import account records before you import contact records.

You can link records during import in one of two ways:

- by indicating the name of the linked record or
- by indicating its external ID code.

In either case, you must make sure that your import CSV file includes a column containing the data.

## **Using the Name to Link Records**

To link records by indicating the name, include a column in your import file for the name of the linked record. For example, to import contact records that are linked to accounts:

- add an Account Name column to your import file
- fill in the name of the appropriate account for each contact record
- use the Import Assistant to map the Account Name column to the Account field in the contact record.

**NOTE:** If a contact record is imported with an associated account that does not yet exist in the database, one can be created during import. The system-created account record will use the contact's address for the account billing and shipping addresses. To enable this feature, select the Create Associated Record option in Step 1 of the Import Assistant.

## Using the External ID to Link Records

You can import a unique identifier code into the External ID field for each record in the application. Then, you can use the External ID field to create links between records in subsequent imports.

For example, an exported CSV file of contact records identifies an associated account for each contact. Each account is represented by a numeric code, rather than by a name, in a column called Account Code. When importing these records, first import the account records, mapping the Account Code column in the CSV file to the External ID field in the application. Next, import the contact records, mapping the Account Code column in the CSV file to the Account External ID field in the Oracle CRM On Demand contact record to create a link between the contact and account records.

## Data Checking Guidelines

Check the data in your CSV file before importing it into Oracle CRM On Demand:

- 1 Check the guidelines for the field type of the data. See [Field Type Guidelines for Importing Data](#) (on page 388).
- 2 Check the specific information pertaining to each record type you want to import. .

The drop-down list in the Import and Export Tools page shows the recommended sequence for importing records. The record types in the list depend on the industry-specific solutions you have implemented, however, you must import the record types in the sequence shown in the list.

**NOTE:** The data checking guidelines use examples relevant to the installations of Oracle CRM On Demand in the U.S and Canada. Other country-specific installations might change the default lists of valid values, so that they differ from the information shown in this topic. For example, the list of valid state or province values will probably be different for installations outside the U.S and Canada. Also, valid values might be different, depending on the languages that are supported.

Oracle CRM On Demand determines the field order in the export CSV file, and can change at any time. Therefore, do not rely on the fields in the export CSV file to be in a specific order. Renaming the iTAG or field name values has no impact on the order of the fields in the export file. If you want more control of field order, consider using Oracle Web services.

## Field Type Guidelines for Importing Data

Make sure the data you want to import meets the specifications for its field type. The field types described in this topic are:

- Text
- Picklist
- Number
- Integer
- Currency
- Percent
- Check box
- Email

- Phone
- Date/Time
- Date

### Text

Each text field in Oracle CRM On Demand has a maximum length. Excess characters are not imported. The Import Results email message warns you when this situation occurs.

**TIP:** Compare the length of the data you want to import against the allowed length. (Open the file in a spreadsheet application and use one of the spreadsheet functions to determine the longest value in a column.) When the data exceeds the limit, consider importing it into a custom field, splitting the data into two separate fields, or abbreviating some data so that it fits within the target length.

### Picklist

Picklist fields allow a user to select a value from a list of values for the field. During the import process, you can specify either to add new picklist values from your CSV file to the application or not to add them.

**NOTE:** If the user's language setting is the same as the company-level language setting, they will always see the picklist values option. If the user's language is different from the company's language setting, they don't see that option. For example, if the company language is French, a user with language set to French can see that option, but a user in the same company with language set to English does not see it.

If you choose not to add them, only picklist values that exactly match the ones in the application are imported. (Values are case-sensitive.) The Import Results email message warns you when this situation occurs.

The company administrator has the ability to change the picklist values for fields except for a few specific fields (for the exceptions, see the guidelines for the record type you want to import).

**NOTE:** If you select the option to add new picklist values when importing data, those new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during that time period.

### *To compare the data in your file to the valid values in the application*

- 1 Open your file in a spreadsheet application.

**TIP:** If you open the file in Microsoft Excel, you can use the AutoFilter feature to see which values appear for specific columns in your file.

- 2 Compare the values in your file against the valid values in Oracle CRM On Demand by doing one of the following:

- If you are an administrator, click the Admin global link in the application and go to the Field Setup page containing the field whose values you want to compare.
- In Oracle CRM On Demand, click the appropriate tab and select a record. On the Edit page, click the drop-down list for the field you want to check, and compare those values against your data.

**TIP:** If you decide to restrict the import data to *only* those values that match the existing ones, make sure every imported value matches an existing value. Case matters when determining if there is a match. You can

either change the data in the import file to match the valid values or add picklist values to the application (see [Changing Picklist Values](#) (on page 87)).

### Number

Import data can be any number between -2,147,483,648 and 2,147,483,647. Commas in your import data are ignored as well as digits after a decimal point (rounding does *not* occur). For example, all these valid values appear as 1,234 in the application:

1234  
1,234  
1234.9

During import, if a value with unexpected characters is found or the value is out of the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Number fields are represented in a common format in the application (for example: 1,234).

### Integer

Integers can be any whole numbers ranging in value from - 2147483648 to 2147483647.

### Currency

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Import data can be preceded by a \$ or other currency character. Negative numbers are valid.

During import, if a value with unexpected characters is found or the value contains too many digits, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Currency fields are represented in a common format in the application (for example: \$1,000,000.00).

### Percent

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Negative numbers are valid. Import data may be preceded or followed by a % character and any number of spaces between the number and the %. For example, all these valid values appear as 1,234.36% in the application:

1234.36  
1,234.36  
1234.35678  
1234.36%  
1,234.36 %

During import, if a value with unexpected characters is found or the value is out of the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Percent fields are represented in a common format in the application (for example: 1,234.36% (with commas and followed by a % sign)).

### Check box

A check box has only two settings: checked or unchecked. The following table shows you the values you can use when importing data. These values are not case-sensitive, so the application recognizes "true," "t," and so on.

Check box is selected	Check box is blank (deselected)
1	0
Y	N
Yes	No
T	F
True	False
Checked	Unchecked

All other values in the import data result in an unchecked setting for the check box field in the application. The Import Results email message does *not* warn you when this situation occurs.

You must use your translated equivalents of the values in the tables, if you are importing under a different language. However, the application will accept the values in the first two rows of the table, regardless of your language setting: Y, N, 1, 0.

**TIP:** Check for values that might be expected to result in the checked setting but that are not recognized as such during import. Convert those values to Y before importing.

During the import process, if a check box field for the record type being imported is not mapped to an import file field, its value is set to unchecked for each imported record.

### Email

If the import data does not match a certain format, the data for the field is not imported. The following criteria are considered invalid:

- Email data ending or beginning with the at sign (@) or period (.). Both symbols must be surrounded by alpha-numeric characters. For example, these values are not valid:  
a@.  
@a.  
@.a  
a@a.  
a@.a  
@a.a
- Empty string
- String too long
- No characters before the @ at sign, for example: @riqhtequip.com
- No @ at sign, for example: isampleriqhtequip.com
- No period (.), for example: isample@riqhtequipcom
- No domain, for example: isample@

- No domain suffix such as com, for example: isample@riqhtequip
- Multiple at signs (@), for example: isample@@riqhtequip.com
- Consecutive periods (.), for example: isample@riqhtequip..com
- Spaces in the string, for example: isa mple@riqhtequip
- Characters other than the following in the local part of an email address:
  - Uppercase and lowercase letters (case insensitive)
  - The digits 0 through 9
  - The characters ! # \$ % & ' \* + - / = ? ^ \_ ` { | } ~ .
- Any special characters in the domain name of an email address. Special characters include: ! # \$ % & ' \* + - / = ? ^ \_ ` { | } ~ ( )

The Import Results email message warns you when data for the field is not imported as a result of incorrect formatting.

### Phone

The same format rules for entering phone number data apply to importing phone number data. Data in a recognized phone number format is converted to a consistent format in the application.

The field length rules that apply to text fields also apply to phone number fields. In particular, if the import data exceeds the length of the application field, the excess characters are *not* imported. The Import Results email message warns you when this situation occurs.

### Date/Time

Import data can contain several different date/time representations. As part of the importing process, you select the format used in your CSV file.

Regardless of their imported format, Date/Time fields are represented in a common format in the application (for example: 01/19/1964 12:15 PM). The format used to display data is determined by the Locale setting of the user, which is shown on the Personal Detail page.

The date/time values are assumed to be correct for the time zone of the person doing the import, as specified on their Personal Detail page in the application. After the dates/times are imported, however, users viewing the data from a different time zone see the date/time adjusted for their time zone.

**TIP:** Make sure that the time zone of the person performing the import matches the time zone of the date/times in the import data file. For instance, if the date/times specified in the import data are relevant to Pacific Standard Time, and a user in the Eastern Standard Time zone imports that data, all times will be incorrect by three hours. The solution is for the user to temporarily set the time zone to Pacific Standard Time when doing the import, so the times are imported correctly. Be sure you know what time zone the date/times in your import file are relative to before you start an import. Note that it is very common for date/times in CSV data files to be in Greenwich Mean Time (GMT) format, so be sure to check this item prior to import.

#### ■ About Dates in Date/Time Field Type

When running the Import Assistant, you are required to specify whether import data has dates with month (MM) first, or day (DD) first. If you specify month first, the following formats are supported:



MM/DD/YY  
MM/DD/YYYY  
MM/DD (year defaults to current year)

If you specify day first, the following formats are supported:

DD/MM/YY  
DD/MM/YYYY  
DD/MM (year defaults to current year)

You may also specify that the import data format is: YYYY-MM-DD.

For all these formats, MM and DD can contain a leading 0 when the date or month is a single digit, but the 0 is not required.

**NOTE:** Dates in the format DD-MON-YY or DD-MON-YYYY are *not* currently supported.

#### ■ About Times in Date/Time Field Type

A time can be specified in the import data. To specify a time with a date, include a space after the date and then the time. If there is no time specified with a date, the time is set to 00:00:00 (midnight). The following time formats are supported:

HH24:MI:SS  
HH:MI:SS AM  
(where HH24 represents a 24-hour time, and AM represents either AM or PM if HH is a 12-hour value)

MI or SS can be omitted; and if omitted, they are set to 00 during import. HH, MI and SS can contain a leading 0 when the value is a single digit, but the 0 is not required.

**NOTE:** Regardless of the date/time format option you select during import, the import process accepts times in 24-hour format. For example, if you select the default Canada format, which is hh:mm:ss AM/PM, and your file shows a time of 15:00:00, the data is properly imported as 3:00:00 PM.

## Date

Date type fields in the application allow entry and display of only a date; they do not allow time to be specified. When importing into one of these fields, valid import data formats are the same as for Date/Time type fields. However, time should *not* be specified in the import data. If a time is specified, it is ignored during the import.

Regardless of their imported format, Date fields are represented in a common format in the application (for example: 12/18/2003).

## About Required Fields

If a field has been designated as required (either by default or by the administrator), the entire record is rejected if you don't map the required fields to columns in your CSV file. The Import Results email message warns you when this situation occurs.

**TIP:** Review the fields for the record type you are importing to determine which ones are required fields. Make sure the import data contains a valid value for all those fields.

## About Read-Only Fields

Read-only fields follow this behavior during an import:

- If a read-only field has a picklist, you must match the picklist values exactly to import them.
- If you have read-only access to a field, you are not able to import data into that field.

## Preparing for Data Importing

Before you start importing data in Oracle CRM On Demand, you must first determine what import method you want to use. For more information on selecting the appropriate import method, see [Import and Export Tools](#) (on page 351). For example, the Oracle Data Loader On Demand Utility supports only specific record types. For more information, see Oracle Data Loader On Demand Guide. It is also recommended that you read the following topic before you perform an import: Before You Import Data.

You might need to edit data in your CSV file or customize Oracle CRM On Demand to make sure all your file data is imported. To determine if that is necessary, do the following before you begin importing:

- Determine the record types you want to import.

You might want to import different record types, such as leads, accounts, contacts, and notes. You must import one record type at a time, and you should follow the recommended sequence for importing.

For example, if you have a file that contains a list of your contacts and another file with your accounts, you want to import accounts first and then contacts to maintain the relationships set up between those record types.

The sequence order is shown on the user interface itself on the Import and Export Tools page.

- Check the data in your file to make sure it:

- Has consistent capitalization, abbreviations, and spelling

Text values are imported exactly as they appear in your CSV file. Therefore, any differences in capitalization can result in additional records being created, when that is not desired. For example, all these values for Account Names would result in new records: ABC, abc, A.B.C.

Additionally, since two account records are recognized as identical if the account name *and* location are identical, addresses must be spelled, capitalized, and abbreviated identically to prevent additional records from being created. For example all these records would **not** be considered identical:

ABC, 111 10th Avenue

ABC, 111 10th Ave.

ABC, 111 10th Ave

ABC, 111 Tenth Avenue

- Does not exceed the maximum length allowed
- Conforms to the formatting requirements for that field

For more information, see [Data Checking Guidelines](#) (on page 388).

- Check the application for required fields for the record type you want to import.

You must map data in your CSV file to all required fields. If you don't, the record is rejected. To determine which fields are required, see the Edit page for the record type you want to import. Required fields are shown in red text.

- Add fields to the application if you want to import data that doesn't map to the default fields in the application.

During the import process, you must match every field in your file to an existing field in the application to capture that data. If your role includes the Customize Application privilege, you can create new (custom) fields in Oracle CRM On Demand to map to the existing fields. For instructions, see [Creating and Editing Fields](#) (on page 75).

- Set up picklist values, if necessary.

During the import process, you can specify how you want the application to handle picklist values in your CSV file that don't match existing picklist values in the application:

- Add them as new ones to the application

**NOTE:** To see the picklist value changes in the application, you might need to sign out and in again.

- Don't add them (capture only the values that match and leave the others blank)

If you want to use the picklist values that exist in the application and import only the data that matches them, verify that the picklist values match exactly, including their spelling and capitalization (values are case-sensitive).

Some picklist values cannot be changed, and a few don't follow this behavior. See [Data Checking Guidelines](#) (on page 388) and review the guidelines for the record type you want to import.

- Select the correct time format.

If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows:

- If the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM.
- If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

## Related Topics

See the following topics for related information:

- [Changing Picklist Values](#) (on page 87)
- [Import and Export Tools](#) (on page 351)

For more information about preparing data importing, see 565278.1 (Article ID) on My Oracle Support.

## Account Book Fields: Import Preparation

The following table contains information about setting up your CSV file before importing book accounts into Oracle CRM On Demand. This information supplements the guidelines in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine

the new name for the field. For more information on time-based book assignments, see [About Time-Based Book Assignments](#) (on page 232).

Default Book Accounts Field Name	Data Type	Maximum Length	Comments
Book	String	150	None
Book Id	String	15	None
Book External ID	String	30	None
Account: Id	String	15	Account identifier.
Account	String	100	None
Account Location	String	50	None
Account External ID	String	30	None
Start Date	Date	None	The date on which the record activation must take place.
End Date	Date	None	The date on which the record activation must end.
Future Primary Flag	String	1	If the future primary flag has a value of Y, then the book for the current record is set to primary for the data object when the book is activated. This is based on the Start Date field. The values for this field are: Y and N.

## Account Fields: Import Preparation

The following table contains specific information about setting up your records before importing accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Name	Text	100	This field is required by default. Therefore, make sure all records have values in this field before import.
Account Type	Picklist	30	Default valid values: Competitor, Customer, Partner, and Prospect
Annual Revenues	Currency	15	None
Billing Address	Picklist	100	The value in this field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Billing Address 2, 3	Text	100 each	This field is not available if shared addresses are set up for your company.
Billing Address1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Billing City	Text	50	This field is not available if shared addresses are set up for your company.
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 355)).  This field is not available if shared addresses are set up for your company.

Default Account Field Name	Data Type	Maximum Length	Comments
Billing PO Box/Sorting Code	Text	30	<p>If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Billing Province	Text	50	<p>If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Billing US State	Picklist	2	<p>Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.</p> <p>This field is not available if shared addresses are set up for your company.</p>
Billing Zip/Post Code	Text	30	<p>This field is not available if shared addresses are set up for your company.</p>
Bill To Address External ID	Text	30	<p>If shared addresses are enabled for your company, the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated Address record.</p>
Call Frequency	Picklist	30	<p>Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.</p>
Description	Text	16,350	<p>If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters and the remaining characters are added to linked Notes, each with a maximum limit of 16,350 characters.</p>
External Unique ID	Text	30	None

Default Account Field Name	Data Type	Maximum Length	Comments
Furigana Name	Text	100	The Furigana equivalent of the Kanji (for Japanese only).
HIN	Text		Health Industry Number. Specific to Oracle CRM On Demand Life Sciences Edition.
Industry	Picklist	50	<p>The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. Alternatively, your company's Oracle CRM On Demand administrator can create a custom Account field that contains the valid values that you expect in your import data. This would allow you to import your data into that custom field instead of this field.</p> <p>Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications</p>
Influence Type	Text	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Integration ID	Text	30	None
Last Call Date	UTC Date Time	7	Specific to Oracle CRM On Demand Life Sciences Edition.
Location	Text	50	<p>In most cases, this field is used to determine record duplication. For more information, see <a href="#">About Record Duplicates and External IDs</a> (on page 372).</p> <p>For example, to distinguish between headquarters and a branch office of Account XYZ, the application checks both the Account Name and the Location to determine if the record is a duplicate.</p>
Main Fax #	Phone	40	None
Main Phone #	Phone	40	None
Market Potential	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Segment	Text	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this text.
Market Share	Number	22	Specific to Oracle CRM On Demand Life Sciences Edition.

Default Account Field Name	Data Type	Maximum Length	Comments
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Number of Employees	Integer	Not applicable	None
Number of Physicians	Number	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Owner	Email	50	<p>File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Parent Account	Text	100	Must be a valid Account name.
Parent Account External ID	Text	30	None
Parent Account Location	Text	50	None
Partner	Check box	Not applicable	Indication that the account is a partner.
Priority	Picklist	30	Default valid values: Low, Medium, and High
Public Company	Check box	Not applicable	This field should be set to the checked state if this is a public (versus privately-owned) company.
Reassign Account	Check box	Not applicable	Indication that the account should be reassigned. When imported, triggers automatic assignment rules for this account record, if your company administrator or manager has set that feature up.
Reference	Check box	Not applicable	This field should be set to the checked state if this account agreed to be a reference that you can give out to prospects.
Reference as of	Date	Not applicable	None



Default Account Field Name	Data Type	Maximum Length	Comments
Region	Picklist	25	Default valid values: East, West, and Central
Route	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit the picklist.
Shipping Address	Picklist	100	<p>This field is only available if shared addresses are set up for your company.</p> <p>This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated Address record.</p>
Shipping Address 1	Text	200	<p>For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping Address 2, 3	Text	100 each	<p>For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.
Shipping Country	Picklist	30	<p>Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping PO Box/Sorting Code	Text	30	<p>If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>

Default Account Field Name	Data Type	Maximum Length	Comments
Shipping Province	Text	50	<p>If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping US State	Picklist	2	<p>Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Ship To Address External ID	Text	30	If shared addresses are enabled for your company, the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated Address record.
Source Campaign	Picklist	30	The campaign that generated the account.
Status	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit the picklist.
Territory	Text	255	None
Web Site	Text	100	No formatting checking (except length checking) is done on the imported data for this field.
YTD Revenue	Number	22	Specific to Oracle CRM On Demand Life Sciences Edition.

## Account Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing account teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type](#)

[Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Account Team Field Name	Field Type	Maximum Length	Comments
Account Access	Picklist	15	Default valid values: Full, Readonly, Edit, Owner.  You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Location	Text	50	None
Account Name	Text	100	None
Contact Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access.  You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Opportunity Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access.  You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Team Role	Text	20	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	None
Account External ID	Text	30	None
User External ID	Text	30	None

## Accreditation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing accreditation data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Accreditation Field Name	Field Type	Maximum Length	Comments
Accreditation Fee	Currency	22	None.
Accreditation ID	Text	50	It is recommended that the internal identifier for the accreditation be unique.
Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	50	None.
Contact	Picklist	15	Use this field if the accreditation contact is already present in Oracle CRM On Demand.
Description	Text	250	None.
Email	Text	40	The email address for the accreditation contact.
First Name	Text	50	Use this field to enter the accreditation contact's first name only if the contact is not present in Oracle CRM On Demand.
Last Name	Text	50	Use this field to enter the accreditation contact's last name only if the contact is not present in Oracle CRM On Demand.
Name	Text	50	It is recommended that the accreditation name be unique.
Objective	Picklist	50	None.
Owner	Picklist	15	None.
Payment Options	Picklist	30	The default valid values are as follows: Check, Credit Card, Cash, and Earned Funds.
Phone	Phone	50	The phone number for the accreditation contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Renewable	Check box	1	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Sales, Technical, Service, Installation, Upgrade, Design, and Security.

Validity (Months)	Number	22	None.
Website	Text	100	The URL for a page that contains additional accreditation information.

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Accreditation Fields

## Accreditation Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing request data for course accreditation into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Accreditation Request Field Name	Field Type	Maximum Length	Comments
Accreditation Date	Date	7	None.
Accreditation Name	Picklist	15	None.
Accreditation Number	Text	50	Accreditation numbers are usually unique.
Accreditation Status	Picklist	30	The default valid values are as follows: Requested, Granted, and Denied.
Description	Text	250	None.
Expiration Date	Date	7	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Partner Name	Picklist	15	None.
Plan	Picklist	15	None.
Renewable	Check box	1	None.
Request Date	Date	7	This field displays the current date during record creation by default, but you can modify it during and after record creation.

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Address Fields: Import Preparation

The following table contains information about setting up your records before importing addresses into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Address Field Name	Data Type	Maximum Length	Comments
Address Name	Text	100	This field is required and must be unique.
Country	Text	30	None
Address 1	Text	200	None
Address 2	Text	100	None
Address 3	Text	100	None
State	Text	30	None
City	Text	50	None
Province	Text	50	None
Postal Code	Text	30	None
Description	Text	100	None
Comments	Text	1999	None

## Allocation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing allocations into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Allocation Field Name	Data Type	Maximum Length	Comments
Allocation Type	Text	30	None
Allocation Qty	Number	22	The quantity of the product that is allocated to the sales representative from the administrator.
End Date	Date/Time	7	The last date on which the product can be disbursed.
Max Qty	Number	22	The quantity of the product that the sales representative can distribute at a given time to a customer.
Order By	Number	22	The order in which the user can see the products in the list.
Sample	Text	15	The product name associated with the allocation.
Start Date	Date/Time	7	The date on which the distribution starts.
Stop Sampling Flag	Boolean	1	When this field is selected, it indicates that the product can no longer be disbursed.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Application Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing application records into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Application Field Name	Data Type	Maximum Length	Comments
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Default Application Field Name	Data Type	Maximum Length	Comments
Address Address 1	Varchar	200	The number and street of the company's address from whom the application is made.
Address Address 2	Varchar	100	None
Address Address 3	Varchar	100	None
Address City	Varchar	50	None
Address Country	Varchar	30	None
Address PO Box/Sorting Code	Varchar	200	None
Address Province	Varchar	50	None
Address US State	Varchar	10	None
Address Zip/Post Code	Varchar	30	None
Annual Revenue	Number	22	The total annual revenue for the company.
Approval Status	Varchar	30	The current approval status for the application.
Approved Date	Date	7	The date and time that the application was approved.
Campaign	Varchar	15	This is the name of the campaign that attracted the partner to make the partner application.
Cellular Phone #	Varchar	40	The submitter's cellular phone number.
Current Approver	Varchar	15	The name of the current approver.
Email Address	Varchar	100	The submitter's email address.
Existing Partnerships	Varchar		The list of existing partnerships.
Expected Partnership Benefits	Varchar	500	The list of expected benefits from this partnership.
First Name	Varchar	50	The submitter's first name.
Industry	Varchar	50	The industry in which the company competes.
Job Title	Varchar	75	The submitter's job title.
Last Name	Varchar	50	The submitter's last name.



Default Application Field Name	Data Type	Maximum Length	Comments
Location	Varchar	50	The location of the company.
Main Fax #	Varchar	40	The primary fax number for the company.
Main Phone #	Varchar	40	The primary phone number used to reach the company.
Name	Varchar	50	The name of the company.
Number of Employees	Number	22	The total number of employees in the company.
Owner	Varchar	15	The owner of the record.
Partner	Varchar	15	The partner who is associated with this application.
Partner Program	Varchar	15	The name of the partner program associated with the application.
Partner Type	Varchar	30	The type of partner for which the application is being submitted.
Program Level	Varchar	30	The level of the partner program associated with the application.
Reject Reason	Varchar	30	The reason why the application was rejected.
Source	Varchar	30	The source from which this application comes, for example, Web site, direct mail, email, and so on.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	Date	7	The submission date and time of the application.
Web Site	Varchar	100	The URL address for the company.
Work Fax #	Varchar	40	The submitter's work fax number.
Work Phone #	Varchar	40	The submitter's work phone number.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Appointment Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and an appointment into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Appointment Contact Field Name	Data Type	Maximum Length	Comments
Contact Full Name	Text	255	None
Contact External ID	Text	30	None
Appointment External ID	Text	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Appointment User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and an appointment into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Appointment User Field Name	Data Type	Maximum Length	Comments
User ID	Text	30	None
Appointment External ID	Text	30	None

Default Appointment User Field Name	Data Type	Maximum Length	Comments
User External ID	Text	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Appointment, Task, and Call Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing appointments and tasks into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Select the correct time format. If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows: if the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM. If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Account Location	Text	50	None
Activity	Text	100	None
Activity Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Campaign	Text	50	None

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
Campaign External ID	Text	30	None
Contact	Text	255	None
Contact External ID	Text	30	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Due Date	Date	7	For tasks, required field by default.
End Time	Date/Time	7	For appointments, required field by default.
External Unique ID	Text	30	None
Fund Request	Picklist	30	Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition. Read-only.
Integration ID	Text	30	None
Lead	Text	255	None
Lead External ID	Text	30	None
Location	Text	100	For appointments only.
MedEd Event	Picklist	50	Specific to Oracle CRM On Demand Life Sciences Edition.
Opportunity	Text	100	None
Opportunity External ID	Text	30	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.  If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
			imported records.
Owner External ID	Text	30	None
Priority	Picklist	30	For tasks, required field by default. Default valid values: 1-High, 2-Medium, 3-Low
Private	Check box	Not applicable	None
Service Request	Text	64	None
Service Request External ID	Text	30	None
Start Time	Date/Time	7	For appointments, required field by default.
Status	Picklist	30	For tasks, the default valid values are: Completed, Deferred, In Progress, Waiting For Someone Else, Not Started
Subject	Text	100	For tasks and appointments, required field by default.
Task Currency	Text	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Type	Picklist	30	For tasks and appointments, the default valid values are: Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Other, Personal, Presentation, To Do

### Related Topics

See the following topics for related information:

- Activity Fields
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Asset Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing assets into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Asset Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Asset Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contract	Text	30	None
Customer Contact	Text	255	None
Description	Text	250	None
Expiration Date	Date	7	None
External Unique ID	Text	30	None
Install Date	Date	7	None
Integration ID	Text	30	None
Notify Date	Date	7	Specific to Oracle CRM On Demand High Tech Edition.
Operating Status	Text	30	None
Product External ID	Text	30	None
Product Name	Text	100	Required field by default.
Purchase Date	Date	7	None
Purchase Price	Currency	15	None
Quantity	Number	15	None
Serial #	Text	100	None
Ship Date	Date	7	None
Warranty	Text	30	None

## Related Topics

See the following topics for related information:

- [Tracking Assets](#)
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Book User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing book users into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. For more information on using books in Oracle CRM On Demand, see [Book Management](#) (on page 215).

Default Book Users Field Name	Data Type	Maximum Length	Comments
Access Profile	String	100	None
Book User Role	String	30	None
Users	String	50	This field is the value for the user alias.
Book Name	String	150	If you perform a new import, then it is recommended that you only specify a value for the Book Name field, or the Book Id, not both.
Book Id	String	15	If you perform a new import, then it is recommended that you only specify a value for the Book Name field, or the Book Id, not both.  If you update an existing record, then the Book Id field is mandatory.
User Identifier	String	15	If you update an existing record, then

Default Book Users Field Name	Data Type	Maximum Length	Comments
			the User Identifier field is mandatory.  If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User Identifier, or User External ID.
User External Id	String	30	If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User Identifier, or User External Id.
User Sign In ID	String	50	If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User Identifier, or User External Id.

## Book Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing books into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. For more information on using books in Oracle CRM On Demand, see [Book Management](#) (on page 215).

Default Books Field Name	Data Type	Maximum Length	Comments
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Default Books Field Name	Data Type	Maximum Length	Comments
Book Id	String	15	None
Parent Book	String	150	None
Book Type	String	30	None
Can Contain Data	String	1	None
Book Name	String	150	None
Description	String	255	None
Partner	String	100	If you want to import the Partner field, then it is recommended that you also import the Location field as well.
External Unique ID	String	30	None
Location	String	50	This field is the partner location.

## Broker Profile Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing broker profile data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Broker Profile Field Name	Field Type	Maximum Length	Comments
Broker Profile Name	Text	40	The name of the broker profile.
Broker Profile Year	Picklist	30	The year during which the broker profile is valid.
Company Historic and Future Growth	Text	250	The description of the company history and future growth for the broker.
Company	Text	250	Provides additional information about the broker.

Overview			
Created	Text	30	Oracle CRM On Demand generates this information: the name of the person who created the broker profile followed by the date.
Fax Number	Phone	35	The broker fax number
Modified	Text	30	Oracle CRM On Demand generates this information: the name of the person who last modified the broker profile followed by the date.
Partner	Picklist	30	The broker name.
Phone Number	Phone	35	The broker phone number.
Primary Address	Text	50	The broker primary address.
Sub Channel	Picklist	30	The broker coverage. The default valid values are as follows: Globals, Locals, Nationals, Regionals, and Wholesalers.
Segmentation	Picklist	30	The broker segmentation. The default valid values are as follows: Commercial, Growth, and Retail.
Territory/Regional Structure	Text	250	The broker territory or regional structure.
Website	Text	100	The URL for a page that contains additional broker profile information.

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Broker Profile Fields

## Business Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing business plan fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Business Plan Fields Name	Data Type	Maximum Length	Comments
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Default Business Plan Fields Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Currency	Picklist	20	None
Description	Note	250	None
Exchange Date	Date	7	None
Notes	Text	250	None
Opportunities	Text	250	None
Parent Plan Name	Text	15	The reference field for holding the Business Plan Object ID.
Period	Text	15	The reference field for holding the Period Object ID.
Plan Revenue	Currency	22	None
Product Name	Text	15	The reference field for holding the Product Object ID.
Status	Picklist	30	None
Strengths	Text	250	None
Threats	Text	250	None
Type	Picklist	30	None
Weaknesses	Text	250	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Campaign Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing campaigns into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Campaign Field Name	Data Type	Maximum Length	Comments
Actual Cost	Currency	15	None
Audience	Text	2000	None
Budgeted Cost	Currency	15	None
Campaign Currency	Picklist	15	None
Campaign Email	Text	50	None
Campaign Name	Text	50	Required field by default.
Campaign Phone #	Phone	40	None
Campaign Type	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, Other
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
End Date	Date	7	None
External Unique ID	Text	30	None
Leads Targeted (#)	Integer	Not applicable	None
Objective	Text	2000	None
Offer	Text	255	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.  If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.

Default Campaign Field Name	Data Type	Maximum Length	Comments
Owner External ID	Text	30	None
Revenue Target	Currency	15	None
Source Code	Text	30	Required field by default.
Start Date	Date	7	None
Status	Picklist	30	Default valid values: Planned, Active, Completed

### Related Topics

See the following topics for related information:

- [Campaign Fields: Import Preparation](#) (on page 419)
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Campaign Recipient Fields: Import Preparation

The following table contains specific information about setting up your CSV file before campaign recipients into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. To import Campaign Recipient fields, the minimum information required is the Contact External ID and Campaign Name.

Default Product Category Field Name	Data Type	Maximum Length
Delivery Status	Text	30
Response Status	Text	30
Campaign Name	Text	100
Contact Full Name	Text	255
Campaign External ID	Text	30
Contact External ID	Text	30
Description	Text	250

## Certification Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing certification data into Oracle CRM On Demand. This information supplements the guidelines given in the topic, [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Certification Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Certification Fee	Currency	22	None.
Certification ID	Text	50	It is recommended that the internal identifier for the certification be unique.
Company	Text	50	None.
Contact	Picklist	15	Use this field if the certification contact is already present in Oracle CRM On Demand.
Description	Text	250	None.
Email	Text	50	The email address for the certification contact.
First Name	Text	50	Use this field to enter the certification contact's first name only if the contact is not present in Oracle CRM On Demand.
Last Name	Text	50	Use this field to enter the certification contact's last name only if the contact is not present in Oracle CRM On Demand.
Name	Text	50	The name of the certification.
Objective	Picklist	15	None.
Owner	Picklist	30	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the certification contact.
Primary Product	Picklist	15	None.

Primary Product Category	Picklist	15	None.
Renewable	Check box	1	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Pre-Sales, Post-Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Validity (Months)	Number	22	None.
Website	Text	100	The URL to a page that contains additional certification information.

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Certification Fields

## Certification Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing certification request data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Certification Request Field Name	Field Type	Maximum Length	Comments
Candidate Name	Picklist	15	None.
Candidate Date	Date	7	None.
Certification Name	Picklist	15	None.
Certification Number	Text	50	Certification numbers are usually unique.
Certification Status	Picklist	30	The default valid values are as follows: Requested, Granted, and Denied.

Description	Text	250	None.
Expiration Date	Date	7	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Plan	Picklist	15	None.
Request Date	Date	7	This field displays the current date during record creation by default, but you can it modify during and after record creation.
Renewable	Check box	1	None.

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Certification Fields

## Claim Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing claims data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for claims data only.

Claim Field Name	Data Type	Maximum Length	Comments
Ability to Work	Picklist	30	None
Address	Text	200	None
Address Line 1	Text	100	None
Address Line 2	Text	100	None
Amount of Liability	Currency	22	None
Amount of Loss	Currency	22	None
At Fault	Picklist	30	None



Claim Field Name	Data Type	Maximum Length	Comments
Business Account	Text	15	The held away institution (business account) linked to this record.
Business Account: External System ID	Text	30	None
Category of Loss	Picklist	30	None
City	Text	50	None
Claim Number	Text	50	The predefined field for the matching record.
Class of Employee	Picklist	30	None
Closed Date	Date	Not applicable	None
Comments	Text	250	None
Company: External System ID	Text	30	Also known as the external unique ID.
Conditions	Text	50	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Country	Text	30	None
County	Text	50	None
Currency Code	Picklist	20	None
Date of Employer Aware of Claim	Date	Not applicable	None
Date of Employer Aware of Injury	Date	Not applicable	None
Employee Injured Number	Number	22	None
Event Number	Text	50	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Hospital Name	Text	50	None
Household	Text	15	None

Claim Field Name	Data Type	Maximum Length	Comments
Household: External System ID	Text	30	None
Injured During Working Hours	Picklist	30	None
Kind of Loss	Picklist	30	None
Liability Source	Picklist	30	None
Line of Business	Picklist	30	None
Location of Loss	Picklist	30	None
Loss Code	Picklist	30	None
Loss Date and Time	Date/Time	Not applicable	None
Loss Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Loss Type	Picklist	30	None
Medical Injury Code	Picklist	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Part of Body Injured	Picklist	30	None
People Injured Number	Number	22	None
Place of Injury	Picklist	30	None
Police Department	Text	50	None
Police Report Number	Text	50	None
Policy	Text	50	The predefined field for the matching record.
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record.
Postal Code	Text	30	None
Province	Text	50	None
Relationship to Insured	Picklist	30	None
Report Date	Date	Not applicable	None

Claim Field Name	Data Type	Maximum Length	Comments
Report Number	Text	50	None
Reported by	Picklist	30	None
Reporter Contact Info	Text	50	None
State	Text	10	None
Status	Picklist	30	None
Time of Death	Date/Time	Not applicable	None
Type of Injury	Picklist	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Contact Book Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing book contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. For more information on time-based book assignments, see [About Time-Based Book Assignments](#) (on page 232)

Default Book Contacts Field Name	Data Type	Maximum Length	Comments
Name	String	150	<p>If you perform a new import, then it is recommended that you specify a value for the Name field, or the Book Id, not both.</p> <p>If you update an existing record, the Name field is optional.</p>

Default Book Contacts Field Name	Data Type	Maximum Length	Comments
Book Id	String	15	<p>If you perform a new import, then it is recommended that you specify a value for the Name field, or the Book Id, not both.</p> <p>If you update an existing record, the Book Id field is mandatory.</p>
Book External ID	String	30	None
Contact: Id	String	15	The Object Id field refers to a contact, and is mandatory for all imports.
Contact External ID	String	30	None
Start Date	Date	None	The date on which the record activation must take place.
End Date	Date	None	The date on which the record activation must end.
Future Primary Flag	String	1	<p>If the future primary flag has a value of Y, then the book for the current record is set as primary for the data object when the book is activated. This is based on the Start Date field. The values for this field are: Y and N.</p>

## Contact Fields: Import Preparation

If you have separate files to import for accounts and contacts, import the accounts first, and then the contacts. Be sure that your Contacts import file contains valid account names from the Accounts import file.

If you only have a Contacts import file, account records are created based on the account name data found in the Account Name field in the Contacts import file. If the contact record contains alternate address data, Oracle CRM On Demand creates a new account and populates the shipping address with the alternative address. The Billing address remains blank.

If multiple contacts are associated with the same account, the account's address fields are set to the Alternate address values associated with the first contact imported for that account. If the first contact imported does not contain alternate address data-but subsequent records *do*, the account's address fields are blank, since only the first imported contact is considered when setting the values of the account address fields. Therefore, if you are importing only from a Contacts import file, before importing, sort the data by Account Name, then make sure that the first contact for each different Account Name contains the address you want to use for the account.

The following table contains specific information about setting up your CSV file before importing contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Contact Field Name	Data Type	Maximum Length	Comments
Account	Text	100	The text for this field is one of several fields used to match an existing Account record. If no match is found, it is the Account Name for a new Account that gets created as part of the Contact import process. For more information, see <a href="#">About Record Duplicates and External IDs</a> (on page 372).
Account External ID	Text	30	None
Account Location	Text	50	The text for this field is one of several fields used to match an existing Account record. For more information, see <a href="#">About Record Duplicates and External IDs</a> (on page 372).
Assistant Name	Text	50	None
Assistant Phone #	Phone	40	None
Best Time to Call	Picklist	30	Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning, and Saturday. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.

Default Contact Field Name	Data Type	Maximum Length	Comments
Call Frequency	Picklist	30	Default values are No See, 1-2 Times/Year, 3-4 Times/Year, and >5 Time/Year. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Cellular Phone #	Phone	40	None
Client Since Date	Date	Not applicable	This field is automatically populated with current date once the Client value is selected in the Contact Type drop-down menu.
Contact Address	Picklist	100	This field is available only if shared addresses are set up for your company.  This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated address record.
Contact Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Contact Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Contact City	Text	50	This field is not available if shared addresses are set up for your company.
Contact Country	Picklist	30	Default values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 355)).  This field is not available if shared

Default Contact Field Name	Data Type	Maximum Length	Comments
			addresses are set up for your company.
Contact Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contact PO Box/Sorting Code	Text	50	<p>If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Contact Province	Text	50	<p>If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Contact Type	Picklist	30	Default valid values: Prospect, Customer, Partner, and Competitor
Contact US State	Picklist	2	<p>Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.</p> <p>This field is not available if shared addresses are set up for your company.</p>
Contact Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.

Default Contact Field Name	Data Type	Maximum Length	Comments
Credit Score	Number	22	Specific to Oracle CRM On Demand Financial Services Edition.
Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Current Investment Mix	Picklist	30	Default values are Aggressive, Moderate, and Conservative. Specific to Oracle CRM On Demand Financial Services Edition. You can edit this picklist.
Customer ID	Text	11	Specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	Date	7	Specific to Oracle CRM On Demand Financial Services Edition.
Degree	Picklist	30	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN, and Master of Public Health. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Department	Text	75	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Email	Text	100	None
Experience Level	Picklist	30	Default values are None, Limited, Good, and Extensive. Specific to Oracle CRM On Demand Financial Services Edition. You can edit this picklist.
External Unique ID	Text	30	None
First Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji



Default Contact Field Name	Data Type	Maximum Length	Comments
			(for Japanese only).
Gender	Picklist	1	Default values are F and M. You can edit this picklist. Specific to Oracle CRM On Demand Financial Services Edition.
Home Phone #	Phone	40	None
Home Value	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Integration ID	Text	30	None
Investment Horizon	Picklist	30	Default values are Short term, Medium term, and Long term. You can edit this picklist. Specific to Oracle CRM On Demand Financial Services Edition.
Job Title	Text	75	None
Last Call Date	Date/Time		Specific to Oracle CRM On Demand Life Sciences Edition.
Last Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Lead Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, and Other.
Life Event	Picklist	30	Default values are Marriage, Birth of Child, Retirement, Divorce, and Other. Specific to Oracle CRM On Demand Financial Services Edition.
Manager	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Contact Edit page).
Manager External ID	Text	30	None
Marital Status	Picklist	30	Default values are Single, Divorced, Married, Partner, Separated, Widowed, and Widower. Specific to Oracle CRM On Demand Financial Services Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Market Potential	Picklist	30	Default values are High, Medium, and Low. Specific to Oracle CRM On Demand Life Sciences Edition.
Middle Name	Text	50	None
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr./Ms.	Picklist	15	Default valid values: Miss., Mr., Ms., Mrs., and Dr.
Never Email	Check box	Not applicable	None
Objective	Picklist	30	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth, and International Diversification. Specific to Oracle CRM On Demand Financial Services Edition.
Opt In	Check box	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Opt Out	Check box	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Own or Rent	Picklist	30	Default values are Own or Rent. Specific to Oracle CRM On Demand Financial Services Edition.
Owner	Email	50	<p>File data must match the User Sign In ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On email ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On email ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None

Default Contact Field Name	Data Type	Maximum Length	Comments
Personal Address External System ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated address record.
Primary Goal	Picklist	30	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets, and Retirement. Specific to Oracle CRM On Demand Financial Services Edition.
Private	Check box	Not applicable	This field should be set to the checked state if you want this contact to be visible only to the account owner.
Profession	Text	50	None.
Qualified Date	Date/Time	Not applicable	None.
Risk Profile	Picklist	30	Default values are Risk Averse, Risk Taker, Conservative, Moderate, and Aggressive. Oracle CRM On Demand Financial Services Edition.
Referred by	Picklist	101	None.
Route	Picklist	30	Default values are Route 1, Route 2, Route 3, and Route 4. Specific to Oracle CRM On Demand Life Sciences Edition.
Segment	Picklist	30	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth. Specific to Oracle CRM On Demand Financial Services Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Self-Employed	Check box	Not applicable	Specific to Oracle CRM On Demand Financial Services Edition.
Source Campaign	Picklist	100	The campaign that generated the contact.
Status	Picklist	30	This column stores the status of a client or contact. The following values are allowed: Active, Quiet Filed, and Dead Filed.
Tax Bracket	Number	22	Specific to Oracle CRM On Demand Financial Services Edition.
Tier	Picklist	30	Default values are Gold, Silver, Bronze, Top 100, Top, Medium, and Low. Specific to Oracle CRM On Demand Financial Services Edition.
Time Zone	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the standard valid values.
Total Assets	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Expenses	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Income	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Liabilities	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Net Worth	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Type	Picklist	30	Default values are Prospect, Customer, Partner, and Competitor.
Work Fax #	Phone	40	None
Work Phone #	Phone	40	None
YTD Sales	Currency	15	Specific to Oracle CRM On Demand Life Sciences Edition.

### Related Topics

See the following topics for related information:

- Contact Fields
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Contact State License Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact state licenses into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Contact State License Field Name	Data Type	Maximum Length	Comments
Contact	Text	15	None
Expiration Date	Text	7	The date on which the medical license for this contact will expire, if known.
License Number	Text	30	The required license number for the contact in the designated state.
State	Text	30	A state in the United States or a province in Canada (optional).
Status	Text	30	The default values for the status of the license are: Blank, Active, or Expired.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Contact State Licenses

## Contact Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Contact Team Field Name	Data Type	Maximum Length	Comments
Contact Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access.  You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contact Full Name	Text	60	None
Team Role	Text	20	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	None
Contact External ID	Text	30	None
User External ID	Text	30	None

### Related Topics

See the following topics for related information:

- [Sharing Records \(Teams\)](#)
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Course Enrollment Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing course enrollment data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Course Enrollment Field Name	Field Type	Maximum Length	Comments
Candidate Name	Picklist	15	None.
Completion Date	Date	22	None.
Course Name	Picklist	15	It is recommended that the course name be unique.

Description	Text	250	None.
Enrollment Date	Date	22	This field displays the current date during record creation by default, but you can modify it during and after record creation.
Enrollment Number	Text	100	None.
Enrollment Status	Picklist	30	The default valid values are as follows: Enrolled, Completed, and Incomplete.
Objective	Picklist	15	None.
Offering Partner	Picklist	15	The third-party company that the candidate is enrolling with for the course. The entry is usually from the list of offering partners for the course.
Owner	Picklist	15	None.

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- [Course Fields](#)

## Course Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing course data into Oracle CRM On Demand. This information supplements the guidelines given in the topic, [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Course Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	100	The company where the course contact works.
Contact	Picklist	15	Use this field if the course contact is already present in Oracle CRM On Demand.
Course Fee	Currency	22	None.

Course ID	Text	30	It is recommended that the internal identifier for the course be unique. Oracle CRM On Demand does not enforce uniqueness.
Course Length (Days)	Number	22	None.
Description	Text	255	None.
Duration (Hours)	Number	22	None.
Email	Text	100	The email address for the course contact.
Exam	Picklist	15	None.
First Name	Text	50	Use this field to enter the course contact's first name only if the contact is not present in Oracle CRM On Demand.
Format	Picklist	30	The default valid values are as follows: Instructor Led, CBT, and Self-Paced.
Hands-on Lab	Check box	1	None.
Last Name	Text	50	Use this field to enter the course contact's last name only if the contact is not present in Oracle CRM On Demand.
Medium	Picklist	30	The default valid values are as follows: Classroom, Online, and CD/DVD.
Name	Text	100	It is recommended that the course name be unique.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the course contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Pre-Sales, Post-Sales, Technical, Service, Installation, Upgrade, Design, and Security.



Website	Text	100	The URL to a page that contains additional course information.
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## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Course Fields

## Coverage Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing coverage data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for coverage data only.

Coverage Field Name	Data Type	Maximum Length	Comments
Begin	Date	Not applicable	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Coverage	Picklist	30	The predefined field for the matching record
Coverage Name	Text	100	None
Coverage Product	Text	15	None
Coverage Product: External System ID	Text	50	Also known as the external unique ID
Coverage Status	Picklist	30	None
Currency Code	Picklist	20	None
Deductible	Currency	22	None
End	Date	Not applicable	None

Coverage Field Name	Data Type	Maximum Length	Comments
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Individual Limit	Currency	22	None
Insured Amount	Currency	22	None
Insured Property	Text	30	None
Insured Property: External System ID	Text	50	Also known as the external unique ID.
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Policy	Text	15	The predefined field for the matching record.
Policy: External System ID	Text	50	None
Status	Picklist	30	None
Total Limit	Currency	22	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Custom Object Field: Import Preparation

The following tables contain specific information about setting up your CSV file before importing custom object fields for custom objects into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

## Custom Object 01, Custom Object 02, and Custom Object 03

The information in the following table is valid for Custom Object 01, Custom Object 02, and Custom Object 03 only.

Default Custom Object Field Name	Data Type	Maximum Length
Name	Text	50
Account Location	Text	50
Description	Text	16,350
Custom Objects 04-15	Text	50
Custom Objects 04-15 External Unique ID	Text	30
Integration ID	Text	30
External Unique ID	Text	30
Owner	Email	50
Currency	Text	20
Quick Search 1	Text	50
Quick Search 2	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Number	Number	16
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Checkbox	Boolean	1
Type	Text	30
Account	Text	100
Campaign	Text	100
Contact	Text	255
Custom Object 01	Text	50
Custom Object 02	Text	50

Default Custom Object Field Name	Data Type	Maximum Length
Custom Object 03	Text	50
Dealer	Text	100
Fund	Text	50
Household	Text	50
Lead	Text	255
MedEd Event	Text	50
Opportunity	Text	100
Portfolio	Text	100
Product	Text	100
Service Request	Text	64
Solution	Text	100
Vehicle	Text	100
Account External ID	Text	30
Campaign External ID	Text	30
Contact External ID	Text	30
Custom Object 01 External ID	Text	30
Custom Object 02 External ID	Text	30
Custom Object 03 External ID	Text	30
Lead External ID	Text	30
Opportunity External ID	Text	30
Owner External ID	Text	30
Portfolio External ID	Text	30
Product External ID	Text	30
Service Request External ID	Text	30
Solution External ID	Text	30

## Custom Objects 04 and higher

The information in the following table is valid for custom objects 04 and higher only.

Default Custom Object Field Name	Data Type	Maximum Length
Account	Text	100
Activity	Text	100
Campaign	Text	100
Custom Objects 01-15	Text	50
Dealer	Text	100
Description	Text	16,350
Exchange Date	Date	30
External Unique ID	Text	30
Fund	Text	50
Fund Request	Text	50
Household	Text	1
Indexed Checkbox	Boolean	1
Indexed Currency	Currency	25
Indexed Date	DateTime	32
Indexed Number	Number	16
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Integration ID	Text	30
Lead	Text	225
MedEd Event	Text	50
Name	Text	50
Opportunity	Text	100
Owner	Email	50
Portfolio	Text	100
Product	Text	100
Quick Search 1	Text	50

Default Custom Object Field Name	Data Type	Maximum Length
Quick Search 2	Text	50
Service Request	Text	64
Type	Text	30
Vehicle	Text	100
Account External Unique ID	Text	30
Activity External Unique ID	Text	30
Asset External System ID	Text	30
Campaign External Unique ID	Text	30
Company External System ID	Text	30
Contact External Unique ID	Text	30
Custom Objects 01-15 External Unique IDs	Text	30
Dealer External Unique ID	Text	30
Fund Request External Unique ID	Text	30
Household External Unique ID	Text	30
Opportunity External Unique ID	Text	30
Owner External Unique ID	Text	30
Portfolio External Unique ID	Text	30
Product External Unique ID	Text	30
Service Request External Unique ID	Text	30
Solution Request External Unique ID	Text	30
Vehicle External Unique ID	Text	30

## Damage Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing damage data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for damage data only.

Damage Field Name	Data Type	Maximum Length	Comments
Claim	Text	15	The predefined field for the matching record.
Claim: External System ID	Text	50	None
Currency Code	Picklist	20	None
Damage Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Damage Name	Text	50	The predefined field for the matching record.
Damaged Property Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Damaged Property Type	Text	50	None
Estimate Amount	Currency	22	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Integration Id	Text	30	None
Insurance Property	Text	15	The predefined field for the matching record.
Insurance Property: External System ID	Text	50	None
Owner	Text	15	None
Property #	Number	22	None

Damage Field Name	Data Type	Maximum Length	Comments
Owner: External Unique ID	Text	30	None

### Related Topics

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Deal Registration Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing deal registrations into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Approval Status	Picklist	30	The valid values for this field are: Pending Approval, Approved, Rejected, Returned, Canceled, and Expired.
Approved Date	Date	Not applicable	None
Associated Contact	Picklist	100	None
Associated Customer	Picklist	100	None
Associated Lead	Text	100	None
Associated Lead: External Unique ID	Text	30	None
Associated Lead: First Name	Text	50	None
Associated Lead: Last Name	Text	50	None
Associated Lead: Integration ID	Text	30	None
Associated Lead: Last Name	Text	50	None
Associated Opportunity	Picklist	100	None



Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Cell Phone	Text	40	None
City	Text	50	None
Close Date	Date	Not applicable	None
Company Name	Text	50	None
Converted to Opportunity	Checkbox	Not applicable	None
Country	Picklist	50	None
Current Approver	Picklist	100	None
Created: Date	DateTime	Not applicable	None
Currency	Picklist	Not applicable	You cannot edit this picklist. Therefore, the values you import must match the valid values.
Deal Size	Currency	15	None
Description	Text	255	None
Email	Text	50	None
Exchange Rate	Date	Not applicable	None
Expiration Date	Date	Not applicable	None
External ID	Text	40	None
Fax	Text	40	None
Final Approver	Picklist	100	None
First Name	Text	50	None
Job Title	Text	75	None
Last Name	Text	50	None
Middle Name	Text	50	None
Modified: Date	DateTime	Not applicable	None
Mr./Ms.	Picklist	30	None
Name	Text	100	This field is required by default. Ensure that all records contain values

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
			in this field before you perform an import.
New Contact	Checkbox	Not applicable	None
New Customer	Checkbox	Not applicable	None
New Opportunity	Checkbox	Not applicable	This field indicates if the opportunity associated with the deal registration is a new one.
Next Step	Text	250	None
Objective	Text	100	None
Objective: External Unique ID	Text	50	None
Owner	Picklist	30	<p>The data in this field must match the user ID of an existing user of Oracle CRM On Demand. If a record does not contain a valid value for this field (including no value), its value is set to the user ID of the user performing the import.</p> <p>If this field is not mapped to a valid import field when running the Import Assistant, the owner is set to the user ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Owner Partner Account	Picklist	100	This field automatically displays the partner company of the owner of the deal registration by default. This field is read-only. The upload process in Oracle CRM On Demand cannot update this field.
Originating Partner Account	Picklist	100	The partner who originally discovered the opportunity. This partner is typically the same as the principal partner, but can be different. This field is optional.
Partner Program	Picklist	50	None
Postal Code	Text	30	None

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Principal Partner	Picklist	100	The primary partner is responsible for the deal registration. This field together with the Principal Partner Location field uniquely identifies a partner. This field cannot be null.
Principal Partner Location	Text	50	The location of the primary partner mentioned in the previous cell. This field together with the Principal Partner field uniquely identifies a partner. This field can be null.
Product Interest	Text	100	None
Reject Reason	Picklist	30	None
Special Price Req.	Checkbox	Not applicable	None
State	Picklist	30	None
Street	Text	100	None
Submission Status	Picklist	30	The valid values for this field are: Not Submitted, Submitted, and Recalled.
Submitted Date	DateTime	Not applicable	None
Support Req.	Checkbox	Not applicable	None
Telephone#	Text	40	None
Type	Picklist	30	The default valid values for this field are: Standard and Nonstandard.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Dealer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing dealer fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

**NOTE:** This section is specific to Oracle CRM On Demand Automotive Edition.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Name	Text	100	None
Site	Text	50	None
Site	Text	50	None
Parent Dealer	Text	100	None
Status	Text	255	None
Parent Site	Text	50	None
Phone Number	Phone	40	None
E-mail	Text	50	None
URL	Text	100	None
Status	Text	30	None
Fax Number	Phone	40	None
Currency	Text	20	None
Stage	Text	30	None
Ranking	Number	16	None
Billing Address	Picklist	100	This field is available only if shared addresses are set up for your company.  This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Billing Address 2, 3	Text	100 each	This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Billing City	Text	50	This field is not available if shared addresses are set up for your company.
Billing Country	Picklist	30	<p>The default valid values are the names of all the countries in the world. The valid value for the U.S. is <i>USA</i>. Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Billing PO Box/Sorting Code	Text	30	<p>If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Billing Province	Text	50	<p>If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Billing US State	Picklist	2	<p>The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data.</p> <p>This field is not available if shared addresses are set up for your company.</p>
Billing Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Bill to Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Shipping Address	Text	30	This field is available only if shared addresses are set up for your company.  This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Shipping Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.
Shipping Country	Picklist	30	The default valid values are the names of all the countries in the world. The valid value for the U.S. is <i>USA</i> . Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data (see <a href="#">About Countries and Address Mapping</a> (on page 355)).  This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Shipping PO Box/Sorting Code	Text	30	<p>If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping Province	Text	50	<p>If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping US State	Picklist	2	<p>The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before importing data.</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping Zip/Post Code	Text	30	<p>This field is not available if shared addresses are set up for your company.</p>
Shipping to Address External ID	Text	30	<p>If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.</p>
External Unique ID	Text	30	None
Parent Dealer External ID	Text	30	None
Primary Owner Id	Id	15	None
Dealer Type	Text	30	None

Default Dealer Field Name	Data Type	Maximum Length	Comments
Modified: Date External	Date/Time	32	None
Owner	Email	50	None
Modified By	Text	255	None
Row Id	Id	15	None
Integration ID	Text	30	None
Custom Object <i>N</i>	Text	50	None
Indexed Picklist 1	Text	30	None
Indexed Picklist 2	Text	30	None
Indexed Picklist 3	Text	30	None
Indexed Picklist 4	Text	30	None
Indexed Picklist 5	Text	30	None
Indexed Picklist 6	Text	30	None
Indexed Number	Number	16	None
Indexed Date	Date/Time	32	None
Indexed Currency	Currency	25	None
Indexed Long Text	Text	255	None
Indexed Short Text 1	Text	100	None
Indexed Short Text 2	Text	100	None
Indexed Checkbox	Boolean	1	None

## Exam Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing exam data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Exam Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.



Available To	Date	7	None.
Company	Text	100	None.
Contact	Picklist	15	Use this field if the exam contact is already present in Oracle CRM On Demand.
Description	Text	255	None.
Email	Text	100	The email address for the exam contact.
Exam Fee	Currency	22	None.
Exam ID	Text	100	It is recommended that the internal identifier for the course be unique.
First Name	Text	50	Use this field to enter the exam contact's first name only if the contact is not present in Oracle CRM On Demand.
Format	Picklist	30	The default valid values are as follows: Multiple Choice, Q&A, and Blended.
Grading Method	Picklist	30	The default valid values are as follows: Grades, Points, and Scores.
Last Name	Text	50	Use this field to enter the exam contact's last name only if the contact is not present in Oracle CRM On Demand.
Maximum Score	Number	22	None.
Medium	Picklist	30	The default valid values are as follows: Computer-Based, Paper-Based, and Blended.
Name	Text	100	It is recommended that the exam name be unique.
Number of Questions	Number	22	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Passing Score	Number	22	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the exam contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.

Time Allowed (Minutes)	Number	22	None.
Type	Picklist	30	The default valid values are as follows: Proctored and Online. An exam is considered to be <i>proctored</i> when the candidates are supervised during the exam.
Validity (Months)	Number	22	None.
Website	Text	100	The URL to a page that contains additional exam information.

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Exam Fields

## Exam Registration Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing exam registration data into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Exam Registration Field Name	Field Type	Maximum Length	Comments
Administering Partner	Picklist	15	The third-party company administering the exam. The entry is usually from the list of administering partners for the exam.
Candidate Name	Picklist	15	None.
Completion Date	Date	7	None.
Description	Text	255	None.
Exam Name	Picklist	15	None.
Grade Achieved	Text	50	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.

Score Achieved	Number	22	None.
Score Expires On	Date	7	None.
Registration Date	Date	7	This field displays the current date during record creation, but you can modify it during and after record creation.
Registration Number	Text	50	Exam registration numbers are usually unique.
Registration Status	Picklist	30	The default valid values are as follows: Registered, Passed, and Failed.

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Exam Fields

## Financial Account Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial accounts in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial account data only.

Financial Account Field Name	Data Type	Maximum Length	Comments
Account Holder	Text	15	None
Account Holder: External System ID	Text	30	None
Balance	Currency	22	None
Balance as of	Date/Time	Not applicable	None
Branch	Text	15	None
Branch: External System ID	Text	30	None
Business Account	Text	15	None

Financial Account Field Name	Data Type	Maximum Length	Comments
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Exchange Date	Date/Time	Not applicable	None
External ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	50	The predefined field for the matching record.
Financial Account Number	Text	50	None
Financial Advisor	Text	15	None
Financial Advisor: External System ID	Text	30	None
Held Away	Boolean	1	None
Held Away Institution	Text	15	None
Held Away Institution: External System ID	Text	30	The external unique ID of the held away institution (business account) linked to this record.
Home Branch	Picklist	30	None
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Joint	Boolean	1	None

Financial Account Field Name	Data Type	Maximum Length	Comments
Open Date	Date	Not applicable	None
Owner: External System ID	Text	30	None
Parent Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Portfolio: External System ID	Text	30	None
Primary Account	Boolean	1	None
Type	Picklist	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Financial Account Holders Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial account holders into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial-account-holder data only.

Financial Account Holder Field Name	Data Type	Maximum Length	Comments
Business Account	Text	15	The predefined field for the matching record
Business Account: External System ID	Text	30	None
Currency Code	Picklist	20	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None

Financial Account Holder Field Name	Data Type	Maximum Length	Comments
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record
Financial Account Holder	Text	15	None
Financial Account Holder: External System ID	Text	30	None
Financial Account Holders Name	Text	50	The predefined field for the matching record
Household	Text	15	None
Household: External System ID	Text	30	None
Joined Date	Date	Not applicable	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Primary Contact	Boolean	1	None
Role	Picklist	30	The predefined field for the matching record

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Financial Account Holdings Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial account holdings into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial-account-holdings data only.

Financial Account Holdings Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record
Financial Account Holdings Name	Text	50	The predefined field for the matching record
Financial Product	Text	15	The predefined field for the matching record
Financial Product: External System ID	Text	50	The external unique ID of the financial product linked to this record
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Performance	Text	22	None
Purchase Date	Date/Time	Not applicable	None
Purchase Price	Currency	22	None
Quantity	Number	22	None
Value	Currency	22	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)

■ [Importing Your Data](#) (on page 533)

## Financial Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial plans in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

### Financial Plan

The information in the following table is valid for Financial Plan only.

Financial Plan Field Name	Data Type	Maximum Length	Comments
Approved by Contact	Boolean	1	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record.
Financial Account: External	Text	50	The external unique ID of the financial account linked to this



Financial Plan Field Name	Data Type	Maximum Length	Comments
System ID			record.
Financial Plan Name	Text	50	The predefined field for the matching record.
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Portfolio	Text	15	None
Portfolio: External System ID	Text	30	None
Sent to Contact	Boolean	1	None
Status	Picklist	30	None
Type	Picklist	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Financial Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial products in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial product only.

Financial Product Field Name	Data Type	Maximum Length	Comments
Category	Picklist	30	None
Class	Picklist	30	None

Financial Product Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Current Price	Currency	20	None
Current Price Last Updated	Date/Time	Not applicable.	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Product ID	Text	50	None
Financial Product Name	Text	50	The predefined field for the matching record.
Financial Product Overview	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Integration ID	Text	30	None
MDM Product Hub ID	Text	50	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Parent Financial Product	Text	15	None
Parent Financial Product: External System ID	Text	50	The external unique ID of the parent financial product linked to this record.
Parent Financial Product: System ID	Text	50	Also known as the external unique ID.
Price Source	Text	50	Also known as the current price source.
Product Catalogue	Text	250	None
Product URL	Text	250	None
Sub-Class	Picklist	30	None
Type	Picklist	30	None

## Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Financial Transactions Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial transactions in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial transactions only.

Financial Transactions Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record.
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Financial Product	Text	15	The predefined field for the matching record.
Financial Product: External System ID	Text	50	The external unique ID of the financial product linked to this record.
Financial Transaction Parent	Text	15	None

Financial Transactions Field Name	Data Type	Maximum Length	Comments
Financial Transaction Parent: External System ID	Text	50	The external unique ID of the financial product linked to this record.
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External Unique ID	Text	30	None
Quantity	Number	22	None
Transaction Date Time	Date/Time		None
Transaction ID	Text	50	The predefined field for the matching record.
Transaction Period	Text	50	None
Transaction Price	Currency	22	None
Transaction Source	Text	50	None
Transaction Type	Picklist	30	None
Value	Currency	22	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Insurance Property Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing insurance property data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for insurance property data only.

Insurance Property Field Name	Data Type	Maximum Length	Comments
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Insurance Property Field Name	Data Type	Maximum Length	Comments
Amount	Currency	22	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Policy	Text	15	The predefined field for the matching record.
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record.
Sequence	Number	22	The predefined field for the matching record.
Type	Picklist	30	The predefined field for the matching record.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Inventory Audit Report Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing inventory audit reports into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Inventory Audit Report Field Name	Data Type	Maximum Length	Comments
Comments	Note	255	None
Completed Date	Date/Time	7	None
Inventory Period	Text	15	The reference field for holding the Inventory Period Object ID.
Reason	Picklist	30	None
Reported Date	Date/Time	7	None
Status	Picklist	30	None
Type	Picklist	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Inventory Period Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing inventory periods into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Inventory Period Field Name	Data Type	Maximum Length	Comments
Active	Boolean	1	This field indicates whether the inventory period is active or inactive.
End Date	Date/Time	7	This field is empty if the inventory period is active.
Reconciled	Boolean	1	This field indicates whether the inventory period has been reconciled or not.
Start Date	Date/Time	7	The starting date of the inventory

Default Inventory Period Field Name	Data Type	Maximum Length	Comments
			period.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Involved Party Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing involved party data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for involved party data only.

Involved Party Field Name	Data Type	Maximum Length	Comments
Claim	Text	15	The predefined field for the matching record.
Claim: External System ID	Text	50	None
Contact	Text	15	The predefined field for the matching record. The Contact field is a concatenation of the last name and first name of the contact.
Contact: External System ID	Text	30	None
Currency Code	Picklist	20	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Injury Description	Text	16350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes,

Involved Party Field Name	Data Type	Maximum Length	Comments
			each with a maximum limit of 16,350 characters.
Injury Summary	Text	250	None
Integration ID	Text	30	None
Involved Party Name	Text	50	None
Location	Picklist	30	None
Owner	Text	15	The owner of the record.
Owner: External System ID	Text	30	None
Role	Picklist	30	The predefined field for the matching record.
Role in Accident	Picklist	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Lead Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing leads into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Lead Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Alias	Text	50	None
Annual Revenues	Currency	15	None
Approximate Income	Currency	15	This is the amount of the approximate annual income.



Default Lead Field Name	Data Type	Maximum Length	Comments
Associated Account	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Lead Edit page).
Associated Contact	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Lead Edit page).
Associated Deal Registration	Text	100	None
Associated Deal Registration: External ID	Text	50	None
Associated Opportunity	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Lead Edit page).
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).
Billing Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).
Billing City	Text	50	None
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 355)).
Billing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 355)).
Billing Province	Text	30	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S.

Default Lead Field Name	Data Type	Maximum Length	Comments
			State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast.
Billing US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Billing Zip/Post Code	Text	50	None
Campaign	Not applicable	Not applicable	This value is specified when using the Oracle CRM On Demand Lead Import Assistant. It is not possible to directly set values for the Campaign field in the import data.
Campaign External ID	Text	30	None
Cellular Phone #	Phone	40	None
Company	Text	100	None
Contact External ID	Text	30	None
Created By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Date of Birth	Date	Not applicable	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Email	Text	100	None
Estimated Close Date	Date	7	None
External Unique ID	Text	30	None
First Name	Text	50	This field is required by default. Make sure all records have values in this

Default Lead Field Name	Data Type	Maximum Length	Comments
			field before import.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Industry	Picklist	50	<p>Oracle CRM On Demand does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. Alternatively, your company's Oracle CRM On Demand Administrator can create a custom Lead field that contains the valid values that you expect in your import data. This allows you to import your data into that custom field instead of this field.</p> <p>Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications</p>
Integration ID	Text	30	None
Job Title	Text	75	None
Last Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Lead Currency	Text	20	None
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr./Ms.	Picklist	15	Default valid values: Miss., Mr., Ms., Mrs., and Dr.
Never Email	Check box	Not applicable	None
Next Step	Text	250	None
Number of Employees	Integer	15	None
Opportunity External ID	Text	30	None

Default Lead Field Name	Data Type	Maximum Length	Comments
Owner	Email	50	<p>File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>
Potential Revenue	Currency	15	None
Primary Phone #	Phone	40	None
Product Interest	Text	100	None
Profession	Text	50	This is the specified profession or occupation.
Rating	Picklist	30	Default valid values: A, B, C, and D
Reassign Lead Owner	Not applicable	Not applicable	This value is specified for all leads in a specific import when using the Oracle CRM On Demand Lead Import Assistant. It determines whether the imported leads are assigned to new owners based on Lead Assignment Rules defined for your company.
Referred By	Picklist	101	None
Sales Person	Picklist	30	None
Sales Person External ID	Text	30	None
Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, and Other
Status	Not applicable	Not applicable	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values and they must match the business logic.

Default Lead Field Name	Data Type	Maximum Length	Comments
Web Site	Text	100	None
Work Fax #	Phone	40	None

### Related Topics

See the following topics for related information:

- [Leads Fields](#)
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### MDF Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing market development fund (MDF) requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Amount PreApproved	Number	22	The total amount that the brand owner approved for the marketing activity.
Amount Requested	Number	22	The total amount that the partner is requesting for the marketing activity.
Approval Status	Varchar	30	The current approval status for the MDF request.
Approver	Varchar	15	The name of the current approver.
Campaign	Varchar	15	The campaign with which the MDF is associated.
Category	Varchar	30	The category to which the MDF request belongs.
Claim Decision Date	Date	7	The date on which a decision was made for the claim.
Claim Status	Varchar	30	Indicates the status of the MDF claim.
Description	Varchar	250	None

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Due Date	Date	7	The date by which the request must be processed.
End Date	UTC Date Time	7	The date and time by which the marketing activity ends.
Expiration Date	UTC Date Time	7	The date after which the MDF request is no longer valid.
Fund	Varchar	15	The name of the fund associated with the MDF request.
Last Approved By	Varchar	15	The name of the person who most recently approved the request.
MDF Request Currency	Varchar	20	None
Marketing Purpose	Varchar	30	The marketing reason for the MDF request.
Owner	Varchar	15	The owner of the record.
Owner Partner Account	Varchar	15	The partner account for which the owner works.
Partner Program	Varchar	15	The partner program with which the request is associated.
Pre-Approval Date	Date	7	The date and time that the MDF request was preapproved.
Principal Partner Account	Varchar	15	The partner company that is leading the effort on the MDF request.
Reason Code	Varchar	30	The reason why a special pricing request was returned or rejected.
Region	Varchar	30	The region for which the MDF request is being made.
Request Date	Date	7	The date and time that the MDF request was created.
Request Name	Varchar	50	The name of the MDF request.
Start Date	UTC Date Time	7	The date and time when the marketing activity starts.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	UTC Date	7	The date and time when the request was submitted.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Total Claim Amount Approved	Number	22	The total claim amount that was approved for the partner.
Total Claim Amount Requested	Number	22	The total claim amount that was requested by the partner.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### MedEd Invitee Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing MedEd Invitee fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. If you do not see a specific field when you try to import your data, then check with your company administrator to determine the new name for the field.

MedEd Invitee Field Name	Data Type	Maximum Length	Comments
Invitee Status	Text	30	The default value is Pending. The other values are: Attended, Cancelled, Confirmed, Declined, and Wait List.
Contact Name	Text	30	Select a contact from the associated applet.
Job Title	Text	30	The job title for the contact.
Type	Text	30	The type of contact.
Email	Text	30	None
Phone#	Text	30	None
Session Detail	Text	30	None
Comments	Text	30	None

**Related Topics**

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

**Message Response Fields: Import Preparation**

The following table contains specific information about setting up your CSV file before importing message responses into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Message Response Field Name	Data Type	Maximum Length	Comments
Account	Text	15	None
Activity	Text	15	None
Comments	Text	250	None
Contact	Text	15	None
Enable Followup	Boolean	1	None
End Time	Date/Time	7	None
External Unique ID	Text	30	None
Plan	Text	15	None
Plan Item	Text	15	None
Response	Text	30	None
Section	Text	100	None
Sequence Number	Numeric	22	None
Start Time	Date/Time	7	None

**Related Topics**

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)



- [Importing Your Data](#) (on page 533)
- Adjusting Message Responses

## Messaging Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plans into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	This field describes the targeted audience for this message plan, for example, cardiac surgeons.
Code	Text	50	This field tracks messaging plans in different Row IDs. For example, if you revise a messaging plan, this field creates a copy of the messaging plan with an incremented version number.
Disclosure Mandatory	Boolean	1	When this field is selected, a disclosure message is displayed.
Enable Followup	Boolean	1	None
Expiration Date	DateTime	7	The date on which the messaging plan ends.
External Unique ID	Text	30	None
Lock Sequence	Boolean	1	This field locks the messaging plan, which prevents users from changing the sequence, or removing messages from a messaging plan.
Name	Text	200	The name of the messaging plan or the personalized messaging plan.
Priority	Number	22	None
Release Date	DateTime	7	The release date of the messaging plan.

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments
Segment	Text	50	This field describes the market segment; that is, the group of accounts, to which the message plan is targeted, for example, tertiary care hospitals. It shows the recommended messaging plans to sales representatives when they are planning calls.
Skin	Text	30	When the messaging planner is opened for editing or previewing, the layout of the messaging plan is also displayed.
Start Date	DateTime	7	None
Status	Picklist	30	The default, valid values for this field are: Approved, In Progress, Rejected, Released, Submitted.
Type	Text	30	The default, valid values for this field are: Product Launch and Targeted Messaging.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Messaging Plans

## Messaging Plan Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plan items into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Messaging Plan Item Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	None

Default Messaging Plan Item Field Name	Data Type	Maximum Length	Comments
Description	Text	255	None
Disclosure Message	Boolean	1	None
Display Name	Text	100	None
Name	Text	100	None
Parent Messaging Plan	Text	30	A messaging plan is made up of a number of messaging plan items. The Parent Messaging Plan field is the messaging plan to which a messaging plan item belongs. The Parent Messaging Plan field links to the name field of a messaging plan record.
Rating	Picklist	30	None
Sequence Number	Number	22	None
Solution Name	Text	30	None
Speaker Notes	Text	2000	None
Status	Picklist	30	None
Synopsis	Text	2000	None
Type	Picklist	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Messaging Plan Items

### Messaging Plan Item Relation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plan item relations into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Messaging Plan Item Relation Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	None
Description	Text	255	None
Display Name	Text	100	None
Name	Text	100	None
Parent Messaging Plan	Text	15	None
Rating	Picklist	30	None
Sequence Number	Number	22	None
Solution Name	Text	30	None
Status	Picklist	30	None
Synopsis	Text	2000	None
Type	Picklist	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Messaging Plan Item Relations

### Note Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing notes into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Note Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Account Name	Text	255	None

Default Note Field Name	Data Type	Maximum Length	Comments
Campaign External ID	Text	30	None
Campaign Name	Text	255	None
Contact External ID	Text	30	None
Contact Name	Text	255	None
Description	Text	16, 035	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Opportunity External ID	Text	30	None
Opportunity Name	Text	100	None
Private	Check box	Not applicable	None
Service Request External ID	Text	30	None
Service Request Number	Number	15	None
Subject	Text	30	Required field by default.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Objective Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing objectives into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Objective Field Name	Data Type	Maximum Length	Comments
Account Name	Text	15	The account name associated with the defined objective.

Default Objective Field Name	Data Type	Maximum Length	Comments
Contact Name	Text	15	The contact name associated with the defined objective.
Currency	Text	20	The currency used for the monetary values of the objective.
Description	Text	2000	The description field for the defined objective.
Exchange Date	Date/Time	7	The date on which the exchange rate applies to the currency.
Objective Name	Text	30	None
Objective Revenue	Text	22	Target revenue for the objective.
Objective Target	Number	22	The Objective Target field is a quantity of sales units, prescriptions, sales calls, and so on. This quantity is defined by the Objective Units field.
Objective Units	Picklist	30	The Objective Units field defines the quantity in the Objective Targets field.
Parent Objective	Text	15	If the defined objective is associated with a parent objective, this field enables both objectives to be combined.
Period	Text	15	This period value corresponds to the criteria that the user enters when setting up forecasts in Oracle CRM On Demand.
Plan Name	Text	15	The business plan name associated with this particular objective (optional).
Product Name	Text	15	The product name associated with the objective.
Status	Picklist	30	The status of the objective.
Target Audience	Text	2000	This is the group of individuals to which the objective is applied.
Type	Picklist	30	The type of objective. The customer sets the values.

### Related Topics

See the following topics for related information:

■ [Field Type Guidelines for Importing Data](#) (on page 388)

- [Importing Your Data](#) (on page 533)
- Objectives

## Opportunity Contact Role Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing roles for contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Contact Role Field Name	Data Type	Maximum Length	Comments
Buying Role	Picklist	39	Default valid values: User, Evaluator, Approver, Decision Maker, User and Evaluator, User and Approver, User and Decision Maker, Evaluator and Approver, Evaluator and Decision Maker, Unknown
Contact External ID	Text	30	None
Contact Name	Text	255	None
Opportunity External ID	Text	30	None
Opportunity Name	Text	100	None
Primary	Check box	Not applicable	None

### Related Topics

See the following topics for related information:

- Contact Fields
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunities into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Account	Text	100	Required field by default.
Account External ID	Text	30	None
Account Location	Text	50	None
Close Date	Date	7	Required field by default.
Dealer	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Expected Revenue	Currency	15	Cannot be imported. Value that is calculated based on potential revenue field multiplied by value in Probability field.
External Unique ID	Text	30	None
Forecast	Check box	Not applicable	None
Integration ID	Text	30	None
Lead Source	Picklist	30	None
Make	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Name	Text	100	None
Next Step	Text	250	None
Opportunity Currency	Picklist	15	Read-only.



Default Opportunity Field Name	Data Type	Maximum Length	Comments
Opportunity Currency	Text	20	None
Opportunity Name	Text	100	Required field by default.
Owner	Email	50	<p>File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	None
Priority	Picklist	30	Default valid values: Low, Medium, High
Probability %	Picklist	3	<p>Default valid values: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100</p> <p><b>NOTE:</b> This field should always be exposed in the layout. If it is hidden, unexpected results occur.</p>
Product Interest	Text	100	Specific to Oracle CRM On Demand Financial Services Edition.
Reason Won/Lost	Picklist	30	Default valid values: Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision, Other
Reassign Opportunity	Check box	Not applicable	None
Revenue	Currency	15	None
Sales Stage	Picklist	50	<p>Required field by default.</p> <p>This field behaves differently from most fields; it will not add picklist values that do not match even if you specify that during the import process. The import data must match the valid values for this field. If you want to capture picklist values from your CSV file that do not match the default picklist values, add them to the application before importing your data. Otherwise, the entire record is rejected. Default valid values are: Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won,</p>

Default Opportunity Field Name	Data Type	Maximum Length	Comments
			Closed/Lost.
Source Campaign	Picklist	30	The campaign that generated the opportunity.
Status	Picklist	30	Default valid values are Pending, Lost, and Won.
Territory	Text	50	None
Total Asset Value	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Premium	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Type	Picklist	30	None
Year	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.

## Opportunity Product Revenue Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunity product records into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
# of Periods	Integer	3	Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency specified (in the

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
			Frequency field. For example, if you have weekly recurring revenue you can track revenue for up to five years.
Asset Value	Currency	15	None
Contact Full Name	Text	255	None
Contract	Picklist	30	None
Description	Text	250	Limitation is 250 characters.
External Unique ID	Text	30	None
Forecast	Check box	Not applicable	None
Frequency	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Integration ID	Text	30	None
Opportunity External ID	Text	30	None
Opportunity Name	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner External ID	Text	30	None
Premium	Currency	15	None
Probability %	Picklist	22	None
Product External ID	Text	30	None
Product Name	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Purchase Date	Date	7	None
Purchase Price	Currency	15	None

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
Quantity	Number	15	None
Serial #	Text	100	None
Ship Date	Date	7	None
Start/Close Date	Date	7	None
Status	Text	30	None
Type	Picklist	30	None
Warranty	Picklist	30	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Order Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing orders into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Order Field Name	Data Type	Maximum Length	Comments
Order ID	Text	30	The primary key to the order object. This field is read-only.
Order Number	Text	50	This field contains the order ID by default.
Description	Text	255	This field is the order description.
Owner	Varchar	15	The record owner.
Price List	Picklist	50	This picklist is read-only. The default values for this picklist are the names of the price lists.
Opportunity	Text	15	None.

Default Order Field Name	Data Type	Maximum Length	Comments
Account	Text	15	None.
Final Account	Text	15	<p>This field is used when the Ebiz PIP Integration value is selected for the Order Usage setting in the company profile.</p> <p>Ebiz PIP Integration is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution, and therefore this field is not available to Oracle CRM On Demand Order Management. For more information on Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, contact Customer Care.</p>
Activity	Text	15	None.
Contact	Text	15	None.
Shipping Address	Text	15	The address to which the order is shipped.
Billing Address	Text	15	The address to which the order is billed.
Order Creation Status	Picklist	30	The status code for the order. For more information on this field, see Order Fields.
Order Integration Message	Text	255	<p>This field is populated only when the Ebiz PIP Integration value is selected for the Order Usage setting in the company profile.</p> <p>Ebiz PIP Integration is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution, and therefore this field is not available to Oracle CRM On Demand Order Management. For more information on Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, contact Customer Care.</p>

## Order Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing order items into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Order Item Field Name	Data Type	Maximum Length	Comments
Product	Text	15	This field contains the foreign key for the product ID. It is a required field.
Order	Text	15	This field contains the foreign key for the order ID. It is a required field.
Order Item Number	Text	15	This field contains the object's primary key by default.
Quantity	Number	22	This field contains the quantity of products ordered. It is a required field.
Item Price	Number	22	None.
Discount Amount	Number	22	None.
Discount Percentage	Number	22	None.
Price After Discount	Number	22	None.

## Partner Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing partners into Oracle CRM On Demand. This information supplements the guidelines in the topic, [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following information before importing partners.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Partner Field Name	Data Type	Maximum Length	Comments
# Physicians	Number	22	This is specific to Oracle CRM On Demand Life Sciences Edition.
Account Partner	Check box	1	None
Annual Revenues	Currency	15	None
Billing Address	Picklist	100	This field is available only if shared addresses are set up for your company.  This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated

Default Partner Field Name	Data Type	Maximum Length	Comments
			address record.
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Billing Address 2	Text	100	This field is not available if shared addresses are set up for your company.
Billing Address 3	Text	100	This field is not available if shared addresses are set up for your company.
Billing City	Text	50	This field is not available if shared addresses are set up for your company.
Billing Country	Picklist	30	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Billing PO /Sorting Code	Text	30	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).  This field is not available if shared addresses are set up for your company.
Billing Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. State to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 355)).

Default Partner Field Name	Data Type	Maximum Length	Comments
Billing US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data.  This field is not available if shared addresses are set up for your company.
Billing ZIP/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Bill To Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Call Frequency	Picklist	30	This field is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Channel Account Manager	Text	50	None
Compliance Review Date	UTC Date Time	7	This is the date that the Compliance Status is due for review.
Compliance Status	Picklist	30	You can edit this picklist.
Description	Text	255	None
Expertise	Text	30	You can edit this picklist.
External Unique ID	Text	30	None.
Furigana Name	Text	100	None.
HIN	Text	30	Health Industry Number (HIN).
Industry	Picklist	50	This picklist is read-only. The default values for this picklist are: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications.



Default Partner Field Name	Data Type	Maximum Length	Comments
Influence Type	Picklist	30	You can edit this picklist.
Last Assignment Completion Date	UTC Date Time	7	None
Last Assignment Submission Date	UTC Date Time	7	None
Last Call Date	UTC Date Time	7	None
Location	Text	50	None
Main Fax #	Phone	40	None
Main Phone #	Phone	40	None
Market Potential	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Segment	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Share	Number	Not applicable	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist. This number is between zero (0) and 100.
Maximum Number of Users	Integer	Not applicable	None
Number of Employees	Integer	22	None
Originating Partner Account	Picklist	100	This picklist is read-only. This picklist contains the value of the valid partner.
Owner	Text	50	This field contains the name of the current owner of this record.
Owner Partner Account	Picklist	100	This picklist is read-only.
Partner Currency	Picklist	15	This picklist is read-only. This value must match the existing value for the current partner currency.
Partner Level	Picklist	30	You can edit this picklist.
Partner Name	Text	100	This is the partner's name.
Partner Organization Status	Picklist	30	This field indicates if the partner is an active or an inactive Partner Relationship Partner (PRM) organization. When this is set to active, a book is automatically created for the partner organization.

Default Partner Field Name	Data Type	Maximum Length	Comments
			Their users are automatically added to the book. This book is only used when relating partners to each other in the Partner Relationship Related Item under the Partner Record field. You can edit this picklist.
Price List	Picklist	50	This picklist is read-only. The default values for this picklist are the names of the price lists.
Primary Partner Type	Picklist	30	This picklist is read-only. The default values in this picklist are the partner types associated with the partner.
Principal Partner Account	Picklist	100	This picklist is read-only. The default value for this picklist is the value of the partner.
Priority	Picklist	30	You can edit this picklist.
Public Company	Check Box	Not applicable	None.
Ranking	Number	22	None.
Reassign Account	Check box	Not applicable	This field indicates that the account should be reassigned. When imported, triggers automatic assignment rules for this account record, if your company administrator or manager has set that feature up.
Reference	Check Box	Not applicable	This field should be set to the checked state if this account agreed to be a reference that you can give out to prospects.
Reference as of	Date	Not applicable	None
Region	Picklist	25	You can edit this picklist. The default valid values are East, West, and Central.
Route	Picklist	30	You can edit this picklist.
Shipping Address	Picklist	100	This field is available only if shared addresses are set up for your company.  This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this

Default Partner Field Name	Data Type	Maximum Length	Comments
			value must match an existing validated address record.
Shipping Address 1	Text	200	<p>For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping Address 2	Text	100	<p>For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping Address 3	Text	50	<p>For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.
Shipping Country	Picklist	30	<p>The default valid values are the names of all the countries in the world. The valid value for the U.S. is <i>USA</i>. Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping PO Box/Sorting Code	Text	30	<p>If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>

Default Partner Field Name	Data Type	Maximum Length	Comments
Shipping Province	Text	50	<p>If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 355)).</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping US State	Picklist	2	<p>The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data.</p> <p>This field is not available if shared addresses are set up for your company.</p>
Shipping ZIP/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Shipping To Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Source Campaign	Picklist	100	This picklist is read-only. The default value for this picklist is the name of the source campaign that generated the account.
Status	Picklist	30	You can edit this picklist.
Territory	Picklist	50	This picklist is read-only. The default field in this picklist is the name of the territory.
Web Site	Text	100	None.
YTD Revenue	Currency	22	This is specific to Oracle CRM On Demand Life Sciences Edition. This

Default Partner Field Name	Data Type	Maximum Length	Comments
			stands for Year To Date.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Plan Account Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Plan Account Field Name	Data Type	Maximum Length	Comments
Account	Picklist	15	The reference field for holding the Account Object ID.
Business Plan	Picklist	15	The reference field for holding the Business Plan Object ID.
Primary Plan Account	Boolean	1	Indicates whether the account is a primary account.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Plan Accounts

## Plan Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Plan Contacts Field Name	Data Type	Maximum Length	Comments
Business Plan	Picklist	15	The reference field holding the Business Plan Object ID.
Contact	Picklist	15	The reference field holding the Contact Object ID.
Primary Plan Contact	Boolean	1	Indicates whether the contact is the primary contact.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Plan Contacts

## Plan Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan opportunities into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Plan Opportunity Field Name	Data Type	Maximum Length	Comments
Opportunity	Text	15	The reference field for holding the Opportunity Object ID.
Business Plan	Text	15	The reference field for holding the Business Plan Object ID.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)

- [Importing Your Data](#) (on page 533)
- Plan Opportunities

## Policy Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing policies in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for policy data only.

Policy Field Name	Data Type	Maximum Length	Comments
Billing Status	Picklist	30	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Cancelled Date	Date	Not applicable	None
Company: External System ID	Text	30	None
Currency Code	Picklist	20	None
Effective Date	Date	Not applicable	None
Expiration Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Face Amount	Currency	22	None
Financial Account	Text	15	None

Policy Field Name	Data Type	Maximum Length	Comments
Financial Account: External System ID	Text	30	None
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Invoice Due Date	Date	Not applicable	None
Owner: External System ID	Text	30	None
Parent Policy	Text	15	None
Parent Policy: External System ID	Text	50	The external unique ID of the parent policy linked to this record.
Policy Number	Text	50	The predefined field for the matching record. This field is also known as the policy number field.
Policy Pay Method	Picklist	30	None
Policy Type	Picklist	30	None
Primary Agency	Text	15	None
Primary Agency: External System ID	Text	30	The external unique ID of the primary agency (business account is set to partner) linked to this record.
Primary Agent	Text	15	None
Primary Agent: External System ID	Text	30	The external unique ID of the primary agent (contact) linked to this record.
Producer Code	Text	50	None



Policy Field Name	Data Type	Maximum Length	Comments
Rate Plan	Picklist	30	None
Rate State	Picklist	30	None
Referral Source	Picklist	30	None
Status	Picklist	30	None
Sub Status	Picklist	30	None
Term	Text	50	None
Total Premium	Currency	22	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Policy Holder Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing policy holders in to Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for policy holder data only.

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Business Account Holder	Text	15	None
Business Account Holder: External System ID	Text	30	None
Company: External System ID	Text	50	None
Contact Holder	Text	15	None
Contact Holder: External Unique ID	Text	50	None
Currency Code	Picklist	20	None

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Household Holder	Text	15	None
Household Holder: External System ID	Text	30	None
Holder Percentage	Percent	22	None
Insured Type	Picklist	30	None
Integration ID	Text	30	None
Owner: External System ID	Text	30	None
Policy	Text	15	The predefined fields for the matching record
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record
Policy Holder Name	Text	250	The predefined fields for the matching record
Role	Picklist	30	The predefined fields for the matching record

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Portfolio Fields: Import Preparation

**NOTE:** This feature might not be available in your version of the application since it is not part of the standard application.

The following table contains specific information about setting up your CSV file before importing the portfolio accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Number	Text	100	None
Account Type	Picklist	30	Default valid values: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings, and Other.
Annual % Rate	Number	15	None
Cancelled/Sold Date	Date	7	None
Credit Limit	Currency	20	None
Effective Date	Date	7	None
Expiration Date	Date	7	None
External Unique ID	Text	30	None
Face Value	Currency	20	None

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Institution	Text	100	None
Institution Location	Text	50	None
Loan Amount	Currency	20	None
Maturity	Date	7	None
Premium	Currency	20	None
Primary Owner ID	Text	50	None
Product	Text	50	None
Purchase Date	Date	7	None
Revenue	Currency	20	None
Risk Class	Text	50	None
Status	Picklist	30	Default valid values: Active, Pending, Quote, Terminated, and Closed.
Term	Number	20	None
Term Unit	Picklist	20	Default valid values: Day, Week, Month, and

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
			Year.
Total Asset Value	Currency	20	None
Valuation Date	Date	7	None
Institution External ID	Text	30	Institution links to account.
Product External ID	Text	30	None

### Related Topics

See the following topics for related information:

- Portfolios
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Price List Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing price lists into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Price List Field Name	Data Type	Maximum Length	Comments
Currency	Varchar	20	The currency of the price list.
Description	Varchar	255	None
Effective From	UTC DateTime	7	The date from which the price list is effective.

Default Price List Field Name	Data Type	Maximum Length	Comments
Effective To	UTC DateTime	7	The date to which the price list is effective.
Owner	Varchar	15	The owner of the record.
Price List Name	Varchar	50	None
Status	Varchar	30	The current status of the price list, for example, In Progress, Published, and so on.
Type	Varchar	30	The type of price list.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Price List Line Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing price list line items into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Price List Line Item Field Name	Data Type	Maximum Length	Comments
Description	Varchar	255	None
Effective From	UTC DateTime	7	The date from which the price list is effective.
Effective To	UTC DateTime	7	The date to which the price list is effective.
List Price	Number	22	The price of the product.
Owner	Varchar	15	The owner of the record.
Price List	Varchar	15	The name of the price list with which this line item is associated.

Default Price List Line Item Field Name	Data Type	Maximum Length	Comments
Price Type	Varchar	30	The type of price on the line item, for example, standard.
Product	Varchar	15	The product of the price line item.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Product Category Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing product category fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Campaign Recipients Field Name	Data Type	Maximum Length
Category Name	Text	100
Parent Category	Text	100
External Unique ID	Text	30
Parent Product Category External ID	Text	30
Description	Text	16,350

## Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Product Field Name	Data Type	Maximum Length	Comments
Body	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.  Default valid values: Coupe, Salon, Cabriolet, Hatchback, Wagon, Sedan
Category	Picklist	30	Default valid values: Clothing, Tractor, SUV, Interior, Heavy Truck, Exterior, Electrical, DriveTrain, Light Truck, Passenger Car
Controlled	Check box	Not applicable	None
Dealer Invoice Price	Currency	15	Specific to Oracle CRM On Demand Automotive Edition.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Door	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.  Default valid values: 3 Door, 2 Door, 4 Door
Engine	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Lot # Tracking	Check box	Not applicable	None
Make	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Orderable	Check box	Not applicable	None
Parent Product	Text	100	None
Part #	Text	50	None
Price Type	Picklist	30	None
Product Category	Text	100	None



Default Product Field Name	Data Type	Maximum Length	Comments
Product Currency	Currency	15	None
Product Name	Text	100	Required field by default.
Product Type	Picklist	30	None
Revision	Picklist	30	None
Serialized	Check box	Not applicable	None
Status	Picklist	30	None
Sub Type	Picklist	30	None
Therapeutic Class	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition.
Transmission	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Trim	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Type	Picklist	30	None
Year	Number	50	Specific to Oracle CRM On Demand Automotive Edition.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Sample Disclaimer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample disclaimers into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Sample Disclaimer Field Name	Data Type	Maximum Length	Comments
--------------------------------------	-----------	----------------	----------

Default Sample Disclaimer Field Name	Data Type	Maximum Length	Comments
Comments	Text	255	This field provides supplementary information on the disclaimer field.
Number	Text	15	None
Disclaimer Text	Text	500	This is the disclaimer text.
End Date	Date/Time	7	The disclaimer expiration date.
Start Date	Date/Time	7	The disclaimer activation date.
Status	Picklist	30	The values for this field are: Active, Inactive, and Expired.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Sample Inventory Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample inventories into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Sample Inventory Field Name	Data Type	Maximum Length	Comments
Audit ReportID	Text	15	None
Inventory Period	Text	15	The reference field pointing to the Inventory Period Object ID.
Last Physical Count	Number	22	None
Lot#	Text	15	None
Opening Balance	Number	22	None
Physical Count	Number	22	None
Sample	Text	15	The reference field pointing to the sample product of this inventory.

Default Sample Inventory Field Name	Data Type	Maximum Length	Comments
System Count	Number	22	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Sample Inventory

## Sample Lot Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample lots into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Sample Lot Field Name	Data Type	Maximum Length	Comments
Cutoff Date	Date	7	This date is calculated. The calculation is based on the expiration date minus the value provide in the Short Days field. of the short days. For example, if the expiration date is January 31 and the value in the Short Days field is 30, Cutoff Date is January 1. This indicates that the sample lot must be used in the immediate future or to return them to the head office.
Description	Text	255	The lot description.
Expiration Date	Date	7	The expiration date of the sample lot.
Inventory By Lot	Boolean	1	This field indicates whether the inventory is tracked at the lot level or product level.
Lot#	Text	100	The lot name.
Orderable	Boolean	1	This field indicates whether the lot can be ordered.

Default Sample Lot Field Name	Data Type	Maximum Length	Comments
Product Level	Number	22	None
Sample	Text	15	The product name.
Short Days	Number	22	The number of lead days.
Start Date	Date	7	The sample lot start date.
UoM	Text	30	The unit of measure.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- Sample Lots

## Sample Transaction Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample transactions into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Sample Transaction Field Name	Data Type	Maximum Length	Comments
# of Packages Sent	Number	22	The number of packages being sent when sample transactions are transferred out.
# of Packages Received	Number	22	The number of packages that were received when sample transactions were transferred in.
Adjustment Reason	Picklist	30	The default values for this field are: Human Error, Theft, Initial Count, Lost, Found and Request.
Comments	Text	255	The description field.

Default Sample Transaction Field Name	Data Type	Maximum Length	Comments
Date	Date/Time	7	The date of the transaction.
Expected Arrival Date	Date/Time	7	None
Expected Delivery Date	Date/Time	7	None
From Transaction	Text	15	None
Inventory Period: Start Date	Date/Time	7	None
Inventory Period: End Date	Date/Time	7	None
Invoice #	Text	15	None
Name	Text	50	None
ParentTxn	Text	15	None
Received Date	Date/Time	7	None
Root Transaction	Text	15	None
Status	Picklist	30	The default values are: In Progress, In Transit, Adjusted, Processed, and Processed with Discrepancies.
Sent Date	Date/Time	7	None
Tracking #	Text	15	None
Transfer To	Text	15	None
Type	Picklist	30	The default values are: Transfer In, Transfer Out, Sample Lost, Inventory Adjustment, and Disbursement.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Service Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing service requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Service Request Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Area	Picklist	30	Default valid values: Product, Installation, Maintenance, Training, and Other
Cause	Picklist	30	Default valid values: Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Closed	Time	Date/Time	None
Contact	Text	255	None
Contact External ID	Text	30	None
Dealer	Picklist	100	Oracle CRM On Demand Automotive Edition
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
External Unique ID	Text	30	None
Opened Time	Date/Time	7	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.  If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to

Default Service Request Field Name	Data Type	Maximum Length	Comments
			the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Principal Partner Account	Varchar	15	None
Priority	Picklist	30	Default valid values: 1-ASAP, 2-High, 3-Medium, 4-Low
Product	Picklist	100	None
Reassign Owner	Check box	Not applicable	None
Servicing Dealer	Text	70	Oracle CRM On Demand Automotive Edition
Source	Picklist	30	Default valid values: Phone, Web, Email, Fax
SR Currency	Text	20	None
SR Number	Text	64	None
Status	Picklist	30	Default valid values: Open, Pending, Closed, Open - Escalated, Cancelled
Subject	Text	250	None
Type	Picklist	30	Default valid values: Question, Issue, Enhancement Request, Other
Vehicle	Text	100	None

### Related Topics

See the following topics for related information:

- [Service Request Fields](#)
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Signature Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing signatures into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Signature Field Name	Data Type	Maximum Length	Comments
Activity ID	Text	15	None
Contact First Name	Text	50	None
Contact Last Name	Text	50	None
Disclaimer Text	Text	500	None
Header Text	Text	800	None
Sales Rep First Name	Text	50	None
Sales Rep Last Name	Text	50	None
Signature Control	Text	16000	This field holds the signature x and y coordinates.
Signature Date	Date	7	None

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Solution Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing solutions into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Solution Field Name	Data Type	Maximum Length	Comments
External Unique ID	Text	30	None
FAQ	Text	250	None
Integration ID	Text	30	None



Default Solution Field Name	Data Type	Maximum Length	Comments
Product Category	Picklist	100	None
Published	Picklist	1	Default valid values are Y and N. These values must be in English, regardless of your language settings.
Service Request Count	Integer	22	None
Solution Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Solution Details	Text	16,000	None
Solution Rating	Number	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Status	Picklist	30	Default valid values: Draft, Approved, Obsolete
Title	Text	100	Required field by default.

### Related Topics

See the following topics for related information:

- Solution Fields
- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

### Special Pricing Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing special pricing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Special Pricing Product Field Name	Data Type	Maximum Length	Comments
Authorized Cost	Number	22	The partner's price that is under negotiation for the special pricing request.

Default Special Pricing Product Field Name	Data Type	Maximum Length	Comments
Competitor Name	Varchar	100	The name of the competitor for the request.
Competitor Partner	Varchar	100	The name of the competing partner.
Competitor Product	Varchar	100	The name of the competitor's product.
Competitor Product Price	Number	22	The price of the competitor's product.
Currency	Varchar	20	None
Description	Varchar	250	None
MSRP	Number	22	The manufacturer's suggested retail price (MSRP) in the currency used.
Other Competitive Information	Varchar	250	Any other information regarding competitive product offerings, for example, special price justification, and so on.
Product	Varchar	15	The name of the product for the special pricing request.
Purchase Cost	Number	22	The price that the partner originally paid to purchase the product.
Quantity	Number	22	The expected quantity of products that will be sold under this request.
Requested Cost	Number	22	The reduced price that the partner requested.
Requested Resale Price	Number	22	The resale price at which the partner wanted to sell the product.
SP Request	Varchar	15	The special pricing request that this special pricing product is associated with.
Suggested Resale Price	Number	22	The resale price suggested by the brand owner.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Special Pricing Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing special pricing requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Approval Status	Varchar	30	The approval status for the special pricing request.
Approver	Varchar	15	The name of the approver.
Authorized Date	UTC Date Time	7	The date and time when the special pricing request was approved.
Claim Decision Date	Date	7	The date on which a decision was made for the claim.
Claim Status	Date	7	The status of the special pricing claim.
Currency	Varchar	20	The currency of the special pricing request.
Deal Registration	Varchar	15	The deal registration that is associated with the special pricing request.
Description	Varchar	15	None
Due Date	Date	7	The date by which the request must be processed.
End Customer	Varchar	15	The customer for the request. If the request is associated with an opportunity, then you can select opportunity account.
End Date	UTC Date	7	The date and time after which the special pricing is no longer effective.
Fund	Varchar	15	The name of the fund associated with the special pricing request.
Last Approved By	Varchar	15	The name of the person who most recently approved the request.
Opportunity	Varchar	15	The opportunity to which the request is related.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Originating Partner Account	Varchar	15	The partner who originated the special pricing request.
Owner	Varchar	15	The record owner.
Owner Partner Account	Varchar	15	The partner account for which the owner works.
Partner Program	Varchar	15	The partner program with which the request is associated.
Principal Partner Account	Varchar	15	The partner company that is leading the effort on the special pricing request.
Reason Code	Varchar	30	The reason why a special pricing request was returned or rejected.
Request Date	Date	7	The date and time that the special pricing request was created.
Request Name	Varchar	50	The name of the request.
Start Date	UTC Date Time	7	The date and time from which the special pricing starts.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	UTC Date Time	7	The date and time that the request was submitted.
Total Amount Authorized	Number	22	The total amount that is being authorized.
Total Amount Requested	Number	22	The total amount that was requested by the partner.
Total Claim Amount Approved	Number	22	The total claim amount that was approved for the partner.
Total Claim Amount Req.	Number	22	The total claim amount that is requested by the partner.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Task Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and a task into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Task Contact Field Name	Data Type	Maximum Length
Contact Full Name	Text	60
Contact External ID	Text	30
Task External ID	Text	30

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Task User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and a task into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Task User Field Name	Data Type	Maximum Length
User ID	Text	50
Task External ID	Text	30
User External ID	Text	30

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## Transaction Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing transaction items into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Transaction Item Field Name	Data Type	Maximum Length	Comments
Description	Text	250	The transaction item description.
Inventory Period	Text	15	None
Line Number	Number	22	The unique number associated with the transaction header record.
Lot#	Text	15	The reference field for holding the Sample Lot ID.
Quantity	Number	22	The number of samples associated with the transaction item.
Sample	Text	15	The name of the sample that is provided with the transaction item. You must document all samples.
Shipped Quantity	Number	22	The number of samples that were shipped as a transaction item.
Transaction#	Text	15	The reference field for holding the Sample Transaction ID.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)

## User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing users into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines](#)

for [Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default User Field Name	Data Type	Maximum Length	Comments
Alias	Text	50	Required field by default.
User Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).
User Address 2, 3	Text	100	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 355).
User City	Text	50	None
User Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 355)).
User PO Box/Sorting Code	Text	30	None
User Province	Text	50	For Canada, see <a href="#">About Countries and Address Mapping</a> (on page 355). However, this is not a picklist field.
User US State	Picklist	2	For the list of valid US state values, see <a href="#">About Countries and Address Mapping</a> (on page 355).
User Zip/Post Code	Text	30	None
Cellular Phone #	Phone	40	None
Currency	Text	50	This field is set at the company level, and, consequently, you cannot import this field or edit its picklist values.
Department	Text	75	None
Division	Text	75	None

Default User Field Name	Data Type	Maximum Length	Comments
Email	Text	50	Required field by default.
Email Temporary Password When I Click Save	Check box	Not applicable	If you select this check box and save, an email with a temporary password is sent to the user.
Employee Number	Number	30	None
External Unique ID	Text	30	Contains the External ID of the imported record.
First Name	Text	50	Required field by default.
Fund Approval Limit	Number	22	Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition.
Integration ID	Text	30	Identifier used for integrating with external systems.
Language	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the standard valid values.
Last Name	Text	50	Required field by default.
Locale	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Middle Name	Text	50	None
Mr./Ms.	Picklist	15	None
Reports To	Text	Not applicable	This is a calculated field, based on the manager's first and last name.
Reports To External ID	Text	30	None
Role	Picklist	50	Required field by default. Default valid values: Administrator, Executive, Field Sales Rep, Inside Sales Rep, Sales & Marketing Manager, Service Manager, Service Rep.
Status	Picklist	30	Required field by default. Default valid values: Active, Inactive.
Time Zone	Text and number	100	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.



Default User Field Name	Data Type	Maximum Length	Comments
Work Fax #	Phone	40	None
Work Phone #	Phone	40	Required field by default.

### Related Topics

See the following topics for related information:

- [Field Type Guidelines for Importing Data](#) (on page 388)
- [Importing Your Data](#) (on page 533)
- [User Fields](#) (on page 145)

## Vehicle Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle contact fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Product Category Field Name	Data Type	Maximum Length
Serial Number	Text	100
Product Name	Text	100
Contact Full Name	Text	60
Contact External ID	Text	30
Vehicle External ID	Text	30
Primary	Check box	Not applicable

## Vehicle Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic [Field Type Guidelines for Importing Data](#) (on page 388). First, you must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

**NOTE:** This section is specific to Oracle CRM On Demand Automotive Edition.

Default Vehicle Field Name	Data Type	Maximum Length
VIN	Text	100
Make	Text	30
Model	Text	30
Year	Text	22
Trim	Text	30
Door	Text	30
Exterior Color	Text	30
External Unique ID	Text	30
Owner External ID	Text	30
Account External ID	Text	30
Product External ID	Text	30
Selling Dealer External ID	Text	30
Service Dealer External ID	Text	30
Product Type	Text	30
Selling Dealer	Text	100
Status	Text	255
Account	Text	100
Account Type	Text	255
Contact	Text	255
License Number	Text	30
License State	Text	10
License Expiry	Date	32
Transmission	Text	30
Account Site	Text	50
Status	Text	30

Default Vehicle Field Name	Data Type	Maximum Length
Location	Text	30
Used/New	Text	30
Engine	Text	30
MSRP	Currency	25
Dealer Invoice Price	Currency	25
Owned By	Text	30
Modified: Date External	Date/Time	32
Modified By	Text	255
Vehicle Currency	Text	30
Interior Color	Text	30
Warranty Type	Text	30
Warranty Start Date	Date	32
Warranty End Date	Date	32
Current Mileage	Number	16
Mileage Reading Date	Date	32
Product Name	Text	100
Type	Text	255
Body	Text	30
Description	Text	250
Owner	Email	50
Created: Date External	Date/Time	32
Row Id	Id	15
Integration ID	Text	30
Account Id	Id	15
Account Integration Id	Text	30
Custom Object <i>N</i>	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30

Default Vehicle Field Name	Data Type	Maximum Length
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Picklist 6	Text	30
Indexed Number	Number	16
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Long Text	Text	255
Indexed Short Text 1	Text	100
Indexed Short Text 2	Text	100
Indexed Checkbox	Boolean	1
Product Category	Text	100
Part #	Text	50
Purchase Date	Date	32
Purchase Price	Currency	25
Quantity	Number	16
Ship Date	Date	32
Install Date	Date	32
Expiration Date	Date	32
Notify Date	Date	32
Contract	Text	30

## Import Assistant

The following topics describe how to use the Import Assistant to import your company data into Oracle CRM On Demand:

- [Importing Your Data](#) (on page 533)
- [Reviewing Import Results](#) (on page 537)
- [Example of Import Results Email and Log File](#) (on page 538)

## Importing Your Data

**Before you begin.** Prepare your CSV files and add any necessary fields or picklist values to the application. For more information, see [Preparing for Data Importing](#) (on page 394). Before importing data, you can determine which method of data importing best suits your requirements by reviewing the supporting documentation on My Oracle Support.

After you have prepared your data for importing, access the Import Assistant, and perform the import. To ensure that the Import Assistant processes all import requests equally, each import request is split into one or more child requests of 100 records. Child requests from different import requests are processed simultaneously, so that no import request is waiting for another request to complete before it is picked up in the queue. The processing time for an import request is updated continuously and reflects the progress of the child requests in the queue.

**TIP:** Make sure that your import CSV file is set up correctly by doing a test import of five records. It is much easier to correct mistakes for five imported records than for the full number in your import file.

### To import records

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section, click the Import and Export Tools link.
- 3 In the Import Data section, select the record type you want to import from the drop-down menu.
- 4 Click the Launch button.

This starts the Import Assistant.

- 5 For Step 1:

**NOTE:** The following options are available depending on the record you wish to import.

- a Select how you want the Import Assistant to identify matching records.

The Import Assistant uses an external unique ID, which is a unique external ID field that is imported from another system, Oracle CRM On Demand row ID, and Oracle CRM On Demand pre-defined fields. These pre-defined fields, such as Account Name and Location, do not have IDs.

For information on how duplicate records are defined, see [About Record Duplicates and External IDs](#) (on page 372).

- b Select what you want the Import Assistant to do if it finds a duplicate unique record identifier in Oracle CRM On Demand. Your choices are to not import duplicate records, to overwrite existing records or to create additional records.

**NOTE:** This option is not available in Task, Appointments, Notes, Account Teams, Contact Teams and Opportunity Contact Roles.

- c Select the action you want the Import Assistant to follow if the imported record's unique record identifier does not match an existing record in Oracle CRM On Demand.

**NOTE:** This option is not available in Task, Appointments and Notes. If you select Overwrite Records and Don't Create New Record in the previous option, this results in the record being updated.

- d** Select how you want to handle picklist values in your CSV file that do not match the values in the application.

The Import Assistant can either add the new value to the picklist or will not import the field value.

**NOTE:** This is not available when importing Notes or if the user's language is different than the company's default language. This is also not applicable to multi-select picklists. The multi-select picklists can only be imported if the value in the CSV file exists in the application.

- e** Decide if the Import Assistant should create a new record for missing associations (related records) in your data file.

**NOTE:** This option is only available when importing Accounts or Contacts.

- f** Select the date/time format used in the CSV file.

For more information, see [Field Type Guidelines for Importing Data](#) (on page 388).

- g** Verify that the file encoding selection is Western.

**NOTE:** Do not change this setting unless you are certain another encoding method is used. The default, Western, applies to most encoding systems in Europe and North America.

- h** Select the type of CSV delimiter used in your file: comma or semi-colon.

- i** In the Error Logging drop-down list, select what you want Oracle CRM On Demand to log: All messages, Errors and Warnings, or Errors Only.

- j** Select the CSV file whose data you want to import.

- k** Select the check box if you want data files to be processed sequentially.

**NOTE:** Choosing to process data files sequentially ensures that when an import request is submitted, the child import requests are always processed in sequence. It also ensures that CSV file dependencies are maintained.

- l** Select the check box if you want to disable auditing while importing data and if you do not want to generate any audit trail records while importing data.

**NOTE:** You cannot disable this auditing setting if you are importing the User record type. This option is available only if the Manage Record Auditing for Imports privilege is enabled for your role. Selecting this check box might improve import performance, depending on the record types that you want to import and the number of audited fields that you would otherwise decide to audit for those record types.

### 6 For Step 2:

- a** Follow the instructions for validating your file, if necessary.
- b** Select a field mapping file, if available.

- c Field mapping files (.map) contain the pairing of fields in your CSV file with existing Oracle CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.
- 7 For Step 3, map the fields in your file to Oracle CRM On Demand fields. At a minimum, you need to map all required fields to column headers in the CSV file.

The Import Assistant lists the column headers from your import CSV file next to a drop-down list showing all the fields in that area in Oracle CRM On Demand, including custom fields you added.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

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

If you selected a .map file, verify that the fields map correctly. Custom fields created since you ran the previous import might need to be mapped.

For information about external IDs, see [About Record Duplicates and External IDs](#) (on page 372).

**CAUTION:** If you have selected the wrong file to import, click **Cancel** to change selections. At this point, using the **Back** button does not clear the cache, so the import file you originally selected appears in the field mapping step.

**CAUTION:** External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with

Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

**8** For Step 4, follow the onscreen instructions, if necessary.

**9** For Step 5, click Finish.

### *To view the queue for your import requests*

**1** In the upper right corner of any page, click the Admin global link.

**2** In the Import and Export Queues section, click the Import Request Queue link.

The Import Request Queue page appears with information about your requests, including the estimated time of completion.

The following table describes the import status.

Status	Description
Queued	The import has not been processed yet.
In Progress	The import is being processed.  <b>NOTE:</b> You can delete the request in this state. However, you must review any data that is partially imported into Oracle CRM On Demand.
Completed	No errors during import.
Completed with errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.
Cancelled	The import was cancelled.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every 20 seconds, or as set by a system process.
# Successfully Imported	The number of records that were imported without



Import Record Information	Description
	any problems.
# Partially Imported	The number that was imported but not all the fields for the record were imported.
# Not imported	The number of records that were not imported at all.
#Cancelled	The number of records imported before the import was cancelled.

### ***To import multi-select picklist values***

- 1 Separate the multivalue picklists by a semicolon in the CSV file.  
For example, if you have a multivalue picklist containing first names and you want to import four names into this field, separate each name with a semicolon.
- 2 Click Add New Value To Picklist.  
Oracle CRM On Demand imports your multivalue picklist.

## **Reviewing Import Results**

You can track the progress of the import by reviewing the queue page in Oracle CRM On Demand. When the import request is completed, you can navigate to the import queue, and drill down on the completed import job. Each import request contains the submitted data file, generated map file, and a log file. This log file provides basic, log file information, including errors, the status of the import, and so on. If an error occurs during the import, it is recommended that you review the log file attached to the import request.

Additionally, when the import request is completed, you receive an email message outlining the specifics of the import. The email message summarizes the import and contains a log file, which lists the records and fields that were not imported.

You can then correct the data in your CSV file and import the information again. The second time, you should direct the system to overwrite existing records when it encounters duplicate records.

### ***To view your import request queue***

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Import and Export Tools section, click the Import and Export Tools link.
- 3 In the Import and Export Queues section, click the Import Request Queue link.

The Import Request Queue page appears, showing the time the import was completed or estimating the completion time.

### ***To review the email message with import results***

- Go to your email application and open the email message from Oracle CRM On Demand.

The message lists any errors that occur on a record-by-record basis along with action you should take, if you want to capture the complete data for that record.

### **Related Topics**

See the following topic for related information:

- [Example of Import Results Email and Log File](#) (on page 538)

## **Example of Import Results Email and Log File**

When your import request is completed, you receive an email message summarizing the import results:

Dear Mike,

Your import request completed at 3/30/2007 7:10:06 AM. Here is a summary of the results:

User: qa/mjones

Import Type: Account

Import File Name: Accounts.csv

Time Completed: 3/30/2007 7:10:06 AM

Total Records: 496

Successfully Imported: 495

Partially Imported: 1

Duplicate Records Ignored: 0

Failed: 0

For more details on your import, please review the log file. If you require further assistance, refer to the online help.

Thank you for using Oracle CRM On Demand,

Oracle CRM On Demand Customer Care

Attached to the email is a log file listing each error that occurs during the import process, such as the following:

Record Specific Error   EXTERNAL\_SYSTEM\_ID: 46552 No matching record is found for import field 'CURRENCY' with value 'INR'. The Oracle CRM On Demand field 'Account Currency' was not updated, but other field values were imported for this record.

## Export Assistant

The following topics describe how to use the Export Assistant to export your Oracle CRM On Demand data:

- [Exporting Your Data](#) (on page 539)
- [Reviewing Export Results](#) (on page 541)

## Exporting Your Data

You can fully or partially export your company's data from Oracle CRM On Demand to an external file. The export generates one or more zip files that contain individual CSV files for each record type you select to export. The generated export files are 1.5 GB each or smaller.

**NOTE:** If your company uses an industry-specific edition of the application, those record types specific to your industry (such as Households, Vehicles, MedEd Events, and Funds) along with their linked activities and notes are excluded from the export. Also, if you export records for *recurring* opportunity products, the application populates the Parent\_ID column for that row. For non-recurring records, the Parent\_ID cell is empty.

**Before you begin.** To perform this procedure, your role must include the Administration Export privilege.

### *To export your company's data*

**NOTE:** There is a limit to the number of exports (both full and partial) that can be done on a weekly basis. A company can perform one full export every 7 days. A user can export up to 1000 records, regardless of the record type, every 7 days.

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section of the Admin Homepage, click the Import and Export Tools link.
- 3 On the Import and Export Tools page, click the Export Data link.  
This starts the Data Export Assistant.
- 4 For Step 1:
  - a Do one of the following:
    - If you wish to perform a full export, select the Export All Record Types radio button.

- If you wish to perform a partial export, select the Export Selected Record Types radio button and the record types you wish to export. You can export all data for a record type or data for individual child records.

**b** Click Next.

The data for parent and child record types is exported to a separate CSV file within the zip file.

**CAUTION:** If you are exporting Notes data in Oracle CRM On Demand, the CSV file contains all the public Notes created in Oracle CRM On Demand as well as the private Notes belonging to the user exporting the data.

**5** For Step 2:

- a** Select the time zone used in the exported CSV file.
- b** Select the date/time format used in the exported CSV file.
- c** Select the type of CSV delimiter used in your file: comma or semi-colon.
- d** Select the filter criteria to limit the data in your export.

**NOTE:** The first time you export your data, you might not want to filter on dates. After that, however, consider setting up incremental exports by filtering the data on dates since the previous export.

**e** Click Next.

**6** For Step 3, review the summary, and click Finish to submit the export request.

**7** On the Export Requested page, click the Export Request Queue link to check the status of your request.

The following table describes the possible export status values.

Status	Description
Queued	The export has not been processed yet.
Re-queued	The export request has been resubmitted to the queue.
In Progress	The export is being processed. <b>NOTE:</b> The request cannot be deleted in this state.
Completed	The export completed with no errors.
Completed with errors	The export completed but there were some errors with some of the records.
Failed	The export completed but none of the records were imported.
Error	The export did not complete because an error occurred.

For more information about the Export Request Queue page, see [Reviewing Export Results](#) (on page 541).

## Reviewing Export Results

The Export Request Queue page displays all pending and completed export requests. If a request is in the Pending Requests section, then you can click Refresh to see if the request has completed. When the request has completed, you can drill down on a request to retrieve the output file.

### To view export requests

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section, click the Import and Export Tools link.
- 3 On the Import and Export Tools page, click the Export Request Queue link.

The Export Request Queue page appears, showing the details of the export requests. The following table describes the export request information.

Export Record Information	Description
Export Type	The type of export: <ul style="list-style-type: none"> <li>■ <b>Full.</b> A full export of your company's data.</li> <li>■ <b>Partial.</b> A partial export of your company's data.</li> </ul>
Record Type	The record type. For partial requests that include child records, the child record is indicated in the format <i>Parent:Child</i> , for example, Account:Contact.
Status	The status, for example, In Progress or Completed.
Requested By	The user who submitted the request.
Submitted	The time and date when the export request was submitted.
Completed	The time and date when the export was finished.

### To retrieve the ZIP file for a request

- 1 In the Completed Requests section, click the Export Type or Record Type link to open the Export Request Details page.  
The page displays the export properties, including the number of records exported (# Exported) and the number of record types successfully exported without any problems (# Completed Objects).
- 2 In the Export Request Attachment section of the page, in the row that contains the ZIP file, you can do the following:

- Select Download from the record-level menu to open or save the ZIP file.

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

- Click Delete to delete the file.

## Oracle Data Loader On Demand Client Utility

The following topics describe how to use the Oracle Data Loader On Demand client to import your Oracle CRM On Demand data:

- [About the Oracle Data Loader On Demand Client Utility](#) (on page 542)
- [Downloading the Oracle Data Loader On Demand Client Utility](#) (on page 542)

### About the Oracle Data Loader On Demand Client Utility

The Oracle Data Loader On Demand client is a command-line utility, which provides a means of importing data into Oracle CRM On Demand from external data sources. It has two functions:

- **Insert function.** This function takes records from a file and adds them to Oracle CRM On Demand.
- **Update function.** This function modifies existing records in Oracle CRM On Demand, using records from an external data source.

For more information, see Oracle Data Loader On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

### Downloading the Oracle Data Loader On Demand Client Utility

Complete the following procedure to download this utility. To install and use this utility, see Oracle Data Loader On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

#### *To download the Oracle Data Loader On Demand utility*

- 1 Sign in to Oracle CRM On Demand, and click Admin.
- 2 Under Data Management Tools, click Import and Export Tools.
- 3 Under Oracle Data Loader On Demand, click Oracle Data Loader On Demand.
- 4 Save the ZIP file to your computer.

## Web Services Integration

Oracle CRM On Demand allows you to:

- Access and change your Oracle CRM On Demand data from a Web services-enabled application
- Create your own applications that integrate with Oracle CRM On Demand

You can:

- Download Web Services Description Language (WSDL) files to help you develop applications that access Oracle CRM On Demand using the Web services interface, see [Downloading WSDL and Schema Files](#) (on page 543).
- Download WSDL and Schema files for using the methods of the Integration Events Web service to access the integration queues, and track changes for particular record types. You can also download Schema files to track custom and renamed fields for the supported record types.
- View a summary of Web services used by your company, see [Reviewing Web Services Utilization](#) (on page 545).

## CTI Integration API

One of the WSDL files available from the Web Services Administration page is for the CTI Activity Web service, which is part of the computer telephony integration (CTI) Integration application programming interfaces (API). The CTI Integration API provides the ability to integrate Oracle CRM On Demand directly with third-party CTI software by using Web service integration. For more information about the CTI Integration API, see Oracle CRM On Demand CTI Developer's Guide.

## Downloading WSDL and Schema Files

The Web services provided by Oracle CRM On Demand allow users of client applications to interact with Oracle CRM On Demand, for example, to insert, update, delete, and query records and to perform a number of administrative tasks.

The Web services are available through:

- **Web Services v1.0.** Used to interact with Custom Objects 01-03, as well as preconfigured objects.
- **Web Services v2.0.** Used to interact with all Oracle CRM On Demand custom objects, as well as preconfigured objects. Compared to Web Services version 1.0, the Web Services version 2.0 API also offers additional options for issuing queries, using the QueryPage method.
- **Service APIs.** Used to manage administrative tasks through Web services. For example, service APIs allow the administration of users in Oracle CRM On Demand, and provide the ability to issue queries for system and usage information in relation to Oracle CRM On Demand.
- **Administrative Services.** Used to interact with Oracle CRM On Demand metadata through Web services. Administrative Services provides the capability of reading and loading Oracle CRM On Demand metadata in an XML format.

From the Web Services Administration page you can:

- Download the Web Services Description Language (WSDL) files used by applications that access the Web services
- Download schema files

- Access the Web services documentation

### Downloading WSDL Files

You can download WSDL files for each record type, and for each of the service APIs.

#### *To download a WSDL file*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Web Service Integration section, click Web Services Administration.
- 3 From the Select Service list, select Web Services v1.0, Web Services v2.0, Service APIs, or Administrative Services as required.
- 4 From the WSDL Object list, select the required record type, for example, Account, or the name of the service API.

The objects displayed in the WSDL Object list depend on the record types that are set up for your company.

- 5 Click one of the following buttons:

- Download Custom WSDL
- Download Generic WSDL

A page containing the WSDL is displayed.

Depending on whether you select Download Custom WSDL, or Download Generic WSDL, custom fields are displayed differently in the WSDL. For Custom WSDL, the XML tags for the custom fields are based on the Integration tags from Field Setup, see [Setting Up Custom Field Integration Tags](#) (on page 80). Custom WSDL allows you to generate WSDL that is specific to your company and that uses your company's field-naming conventions.

For Generic WSDL, the custom fields are based on generic XML tags: CustomNumber0, CustomCurrency0, and so on. Using these placeholders, together with the Mapping Service allows applications to map to the field names that your company uses.

- 6 Save the WSDL file to your computer.

### Downloading Schema Files

The Integration Events Web service uses Schema (XSD) files in its WSDL, which you download in addition to the integrationevents.wsdl file. The WSDL file contains placeholders for the XSD schema files of all record types for which your company currently has active integration event actions defined. Generic WSDL files are available. However, if you create custom fields or rename fields for a record type, then you cannot use the Download Generic Schema button. Instead, you must download an XSD file, using the Download Custom Schema button in the Web Services Administration page. For more information about the Integration Events Web service, see *Oracle Web Services On Demand Guide*.



**To download a schema file**

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Web Service Integration section, click Web Services Administration.
- 3 From the Select Service list, select Web Services v1.0 or Web Services v2.0.
- 4 From the WSDL Object list, select the required record type, for example, Account.  
The objects displayed in the WSDL Object list depend on the record types that are set up for your company.
- 5 Click one of the following buttons:
  - Download Custom Schema
  - Download Generic Schema

A page containing the schema file is displayed.

Depending on whether you select Download Custom Schema, or Download Generic Schema, custom fields are displayed differently in the schema. For Custom Schema, the XML tags for the custom fields are based on the integration tags from Field Setup. For Generic Schema, the custom fields are based on generic XML tags.

- 6 Save the Schema file to your computer.

**Accessing the Web Services Documentation**

To access the Web services documentation, click Download Documentation in the title bar on the Web Services Administration page. The Oracle CRM On Demand Documentation page is displayed from which you can access the Web services and other documentation for different Oracle CRM On Demand releases.

**Reviewing Web Services Utilization**

From the Web Services Utilization Page, you can review a summary of the Web services used by your company. By default, the Web service requests are listed by session ID. The Web Service client Name, Web Service name, operation, number of operations, start time, end time, and user alias for the session are displayed. The following table describes what you can do from the Web Services Utilization page.

To do this	Follow these steps
Create a new list of Web Service requests	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in Creating and Refining Lists.
Display details of a Web service request	Click the session ID to display a detail page for the Web service request.
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists.
Find a Web Service request	Select the required filter criteria in the drop-down lists next to Show results where.

To do this	Follow these steps
Manage all the Web Service request lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in Creating and Refining Lists.
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page.
Sort the Web service requests in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to see at one time.
View a subset of Web services operations	Click the drop-down list in the title bar and change the selection as required: <ul style="list-style-type: none"> <li>■ <b>All.</b> Displays a list of all Web services operations</li> <li>■ <b>All Operations Today.</b> Displays a list of all Web services operations for today</li> </ul>

## About Creating a Web Services List

The process for creating or refining a Web services list is similar to that described in Creating and Refining Lists. However, the Web Service List pages do not have the Search In section that is provided on the corresponding pages for other record types.

The fields that you can use for filtering a Web services list, and which you can select for display in the search results are as follows:

Field	Description
End Time	The end time of the Web service request.
Entry Type	Possible values are: Login, Logout, and Dispatch.  Every Web service call, apart from login and logout, is set to Dispatch for this field because the calls go through the Inbound Web service Dispatcher business service.
Input Message Size (Bytes)	The size of the input message in bytes.
Operation	The operation for the Web service request.
# of Operations	The number of operations in the Web service request.

Field	Description
Output Message Size (Bytes)	The size of the output message in bytes.
Session ID	The session identifier of the Web service request.  This is actually the foreign key for the corresponding session in the login history table, and not the actual session ID used in the Web service request.
Start Time	The start time of the Web service request.
User Alias	The user alias of the user who executed the Web service request.
Web Service Client Name	The name of the Web service client from which the request was made.
Web Service Name	The name of the Web service to which the request was made.
Web Service Space	The namespace used in the request.

## Oracle Migration Tool On Demand Client Utility

The following topics describe how to use the Oracle Migration Tool On Demand client to export your Oracle CRM On Demand data:

- [About the Oracle Migration Tool On Demand Client Utility](#) (on page 547)
- [Downloading the Oracle Migration Tool On Demand Client Utility](#) (on page 548)

### About the Oracle Migration Tool On Demand Client Utility

The Oracle Migration Tool On Demand client is a command-line utility, which eliminates the need to copy customized configurations manually from Oracle CRM On Demand environment to another environment. For example, you might want to copy customized configurations from a customer test environment to a production environment. You can use this client utility with the Administration Services, which is a set of administration Web services, to automate the administration of your company's configurations. This client utility enables you to extract and import specific configuration information directly to and from your computer. You can import the configurations immediately or in batch mode. The Administration Services enable client applications to access the configurations. You can import the following configurations:

- Access profiles
- Field management definitions
- Custom record types
- Custom Web tabs
- Picklists
- Cascading picklists
- Custom Web links

- Action bars
- Homepage layouts
- Page layouts
- Roles

### Downloading the Oracle Migration Tool On Demand Client Utility

Complete the following procedure to download the client utility, and follow the steps in Oracle Migration Tool On Demand Guide to install, configure, and use this client utility. Oracle Migration Tool On Demand Guide is available from the [Oracle CRM On Demand documentation library](http://www.oracle.com/technology/documentation/siebelcrmod.html) (see Oracle CRM On Demand documentation library - <http://www.oracle.com/technology/documentation/siebelcrmod.html>) on Oracle Technology Network. For information on downloading the Web Services Description Language (WSDL) that you require to access the Administrative Services, see [Downloading WSDL and Schema Files](#) (on page 543). For information about the APIs provided by the Administrative Services, see Oracle Web Services On Demand Guide, which is available from the [Oracle CRM On Demand documentation library](http://www.oracle.com/technology/documentation/siebelcrmod.html) (see Oracle CRM On Demand documentation library - <http://www.oracle.com/technology/documentation/siebelcrmod.html>) on Oracle Technology Network.

#### *To download the Oracle Migration Tool On Demand client utility*

- 1 Create a directory on your computer in which to extract the Oracle Migration Tool On Demand files, for example, C:\Oracle Migration Tool On Demand.
- 2 Sign in to Oracle CRM On Demand, and click Admin.
- 3 Under Data Management Tools, click Import and Export Tools.
- 4 Under Metadata Import and Export Tools, click Oracle Migration Tool On Demand.
- 5 Save the ZIP file to your computer.

### Administering Personal Extract Definitions

Personal extract definitions enable a company administrator to specify the set of data from Oracle CRM On Demand to synchronize with a specific client application. You can create, edit, and delete personal extract definitions for your company. For more information about personal extract definitions, see the following:

- [About Personal Extract Definitions](#) (on page 549)
- [Managing Personal Extract Definitions](#) (on page 560)

To create a personal extract request based on a personal extract definition, a client application can make a Web services call, see [Creating Personal Extract Requests](#) (on page 561). Web services calls can also be made to retrieve the data in a personal extract request. Users with the necessary privilege can also download the files from the Personal Export Request Queue page, see [Viewing Personal Extract Requests](#) (on page 561).

## About Personal Extract Definitions

A *personal extract definition* is an XML file that defines a set of data that Oracle CRM On Demand synchronizes with a client application. The personal extract definition specifies a list of record types, the list of fields for each record type, and the filter criteria used to determine which data is synchronized. The two types of personal extract definition are as follows:

- **Role-specific.** It is used for all users with the specified role.
- **Default.** It is used for all users who do not have a role-specific personal extract definition defined.

On the Personal Extract Definition List page, you can upload multiple personal extract definitions for a single client application. Each client application can have one active default personal extract definition and one active personal extract definition for each role. For more information about uploading personal extract definitions, see [Managing Personal Extract Definitions](#) (on page 560).

When a personal export request is created through a Web services call, the data defined in the personal extract definition is exported to one or more CSV files. The personal extract definition used is either a role-specific personal extract definition or the default personal extract definition for the client. The default definition is used if no role-specific personal extract definition has been created.

## Example of a Personal Extract Definition XML File

The following example illustrates the structure of a personal extract definition XML file. In this example, the Account Name and Location fields for the Account record type and the AccountId and ContactId fields for the Account Contact child record type are specified.

```
<?xml version="1.0" encoding="utf-8"?>
<PersonalExtract>
  <ClientName>Mobile Client</ClientName>
  <Description>PED for Mobile Client</Description>
  <DateTimeFormat></DateTimeFormat>
  <TimeZone></TimeZone>
  <Delimiter></Delimiter>
  <ListOfRecordType>
    <RecordType>
      <Name>Account</Name>
      <ViewMode>Personal</ViewMode>
      <BookId></BookId>
      <IncludeSubBooks></IncludeSubBooks>
      <ListOfField>
        <Field>
          <FieldName>AccountName</FieldName>
        </Field>
        <Field>
```

```

        <FieldName>Location</FieldName>
    </Field>
</ListOfField>
</RecordType>
<RecordType>
    <Name>Acct Contact</Name>
    <ListOfField>
        <Field>
            <FieldName>AccountId</FieldName>
        </Field>
        <Field>
            <FieldName>ContactId</FieldName>
        </Field>
    </ListOfField>
</RecordType>
</ListOfRecordType>
</PersonalExtract>

```

For sample personal extract definition XML files that you can use, see [Examples of Personal Extract Definition XML Files](#) (on page 552).

## XML Elements of the Personal Extract Definition File

The following table describes each of the elements in the personal extract definition XML file.

XML Element	Required	Default Value	Element Contents
<PersonalExtract>	Yes	Not applicable	The root element of the personal extract definition.
<ClientName>	Yes	Not applicable	The name of the client. This name is displayed in the UI when a personal extract definition is saved.
<Description>	No	Not applicable	A description of the client. The description is displayed in the Personal Extract Definition List page.
<DateTimeFormat>	No	USA	The DateTime format for values in the exported CSV files. All values supported by the export functionality are allowed: USA, CAN, UK, EUR, and Other.
<TimeZone>	No	User Default	The time zone used for Date, Time, or DateTime values in the exported CSV files. The values are: User Default, Company Default, or any time zone

			value that Oracle CRM On Demand supports.
<Delimiter>	No	Comma	The delimiter value used in the exported CSV files. The values are: Comma or Semi-Colon.
<ListOfRecordType>	Yes	Not applicable	Contains the list of record types to be exported for a client.
<RecordType>	Yes	Not applicable	Contains the definition of the records to be exported for a record type.
searchspec (attribute of <RecordType>)	No	All visible	The filter criteria for a record type. The syntax is the same as that used in the searchspec argument in the Web Services v2.0 QueryPage method. The fields are specified using the Web Services v2.0 integration tag. All operations of the Web Services v2.0 call are supported in the searchspec attribute. For more information, see Oracle Web Services On Demand Guide.
<Name>	Yes	Not applicable	The name of the record type. It can be a parent or a child record type. For child record types, the name is the child access object ID. For more information, see Oracle Migration Tool On Demand Guide. In that guide, record type names are listed under the Object Name in the XML File column in the table of object names and their corresponding display names in the UI. For more information, see <a href="#">Specifying Record Types in Personal Extract Definitions</a> (on page 557).  All record types and fields supported by the Web Services v2.0 API are supported.
<ViewMode>	No	See section about using <ViewMode> and <BookId>	The level of access to be applied. For more information about the values of ViewMode, see Oracle Web Services On Demand Guide.
<BookId>	No	Not applicable	A book to which records are assigned.
<IncludeSubBooks>	No	Y	Whether to include subbooks. The values are: Y and N.
<ListOfField>	Yes	Not applicable	Contains the list of fields to be exported for a record type.
<Field>	Yes	Not applicable	Contains a field to include in the export.

<FieldName>	Yes	Not applicable	<p>The name of the field. The names are the internal names that are used in the Web Services v2.0 WSDL file for the record type.</p> <p>For custom fields, you can specify either the custom or generic integration tag for the field. For example, a custom field of type Text (Short) might have a custom integration tag of stCustomTextSample and a generic integration tag of customtext01. For more information about integration tags, see <a href="#">Setting Up Custom Field Integration Tags</a> (on page 80) and <a href="#">Specifying Record Types in Personal Extract Definitions</a> (on page 557).</p>
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## About Using <ViewMode> and <BookId>

In personal extract definitions, you can use <ViewMode> and <BookId> to restrict the records exported for a record type to a particular access level or book. When using <ViewMode> and <BookId> the following rules are applied by Oracle CRM On Demand:

- If neither a ViewMode nor BookId value is specified, then ViewMode is set to Broadcast.
- If a ViewMode value is not specified but a BookId is specified, then the record type is exported with the BookId applied, and the ViewMode is set to Context.
- If both ViewMode and BookId values are specified and ViewMode does not have the value Context, then the BookId is used, and the ViewMode is set to Context.

## Examples of Personal Extract Definition XML Files

You can paste the examples of personal extract definitions in this topic into an XML file and upload them to Oracle CRM On Demand with minimal changes. For more information about adding personal extract definitions, see [Managing Personal Extract Definitions](#) (on page 560).

**NOTE:** To use these sample personal extract definition files, any personal extract API requests must specify a client name value that matches the personal extract definition uploaded to Oracle CRM On Demand.

### Sample 1

The following example specifies all account records with an AccountName value, a blank Location field, and where ViewMode is set to Sales Rep visibility:

```
<?xml version="1.0" encoding="utf-8"?>
```

```
<PersonalExtract>
```

```
  <ClientName>Sample #1</ClientName>
```

```
  <Description>Extract all Accounts with an AccountName value and a blank Location using Sales Rep visibility.</Description>
```

```
  <ListOfRecordType>
```



```
<RecordType searchspec="[AccountName] IS NOT NULL AND [Location] IS NULL">
  <Name>Account</Name>
  <ViewMode>Sales Rep</ViewMode>
  <ListOfField>
    <Field>
      <FieldName>AccountName</FieldName>
    </Field>
    <Field>
      <FieldName>Location</FieldName>
    </Field>
    <Field>
      <FieldName>ExternalSystemId</FieldName>
    </Field>
  </ListOfField>
</RecordType>
</ListOfRecordType>
</PersonalExtract>
```

## Sample 2

The following example specifies all account records with an AccountName value and a blank Location field assigned to a particular book:

```
<?xml version="1.0" encoding="UTF-8"?>
<PersonalExtract>
  <ClientName>Sample #2</ClientName>
  <Description>Extract all Accounts with an AccountName value and a blank Location using a BookId value.</Description>
  <ListOfRecordType>
    <RecordType searchspec="[AccountName] IS NOT NULL AND [Location] IS NULL">
      <Name>Account</Name>
      <BookId>1234-ABCDE</BookId>
      <ListOfField>
        <Field>
          <FieldName>AccountName</FieldName>
        </Field>
      </ListOfField>
    </RecordType>
  </ListOfRecordType>
</PersonalExtract>
```

```

        <Field>
        <FieldName>Location</FieldName>
    </Field>
    <Field>
    <FieldName>ExternalSystemId</FieldName>
    </Field>
</ListOfField>
</RecordType>
</ListOfRecordType>
</PersonalExtract>

```

### Sample 3

The following example specifies all account records with an AccountName value, a blank Location field, and all the associated child account contact records assigned to a particular book:

```

<?xml version="1.0" encoding="UTF-8"?>
<PersonalExtract>
    <ClientName>Sample #3</ClientName>
    <Description>Extract all Accounts with an AccountName value and a blank Location using a BookId
value.</Description>
    <ListOfRecordType>
        <RecordType searchspec ="[AccountName] IS NOT NULL AND [Location] IS NULL">
            <Name>Account</Name>
            <BookId>1234-ABCDE</BookId>
            <ListOfField>
                <Field>
                    <FieldName>AccountName</FieldName>
                </Field>
                <Field>
                    <FieldName>Location</FieldName>
                </Field>
                <Field>
                    <FieldName>ExternalSystemId</FieldName>
                </Field>
            </ListOfField>
        </RecordType>
    </ListOfRecordType>

```

```

</RecordType>
  <RecordType searchspec ="[AccountName] IS NOT NULL AND [Location] IS NULL">
    <Name>Acct Contact</Name>
    <BookId>1234-ABCDE</BookId>
    <ListOfField>
      <Field>
        <FieldName>Id</FieldName>
      </Field>
      <Field>
        <FieldName>AccountName</FieldName>
      </Field>
      <Field>
        <FieldName>ContactFirstName</FieldName>
      </Field>
      <Field>
        <FieldName>ContactLastName</FieldName>
      </Field>
    </ListOfField>
  </RecordType>
</ListOfRecordType>
</PersonalExtract>

```

## Sample 4

The following example specifies all account records with an AccountName value, a blank Location field, and all the associated child account contact records assigned to a particular book. It also specifies all Custom Object 03 records and all associated child contact records assigned to a particular book:

```

<?xml version="1.0" encoding="utf-8"?>
<PersonalExtract>
  <ClientName>Sample #4</ClientName>
  <Description>Extract all Accounts with an AccountName value and a blank Location and all
associated Account Contact records using a BookId value. Extract all C03 records and associated
Contact records using a BookId value.</Description>
  <ListOfRecordType>
    <RecordType searchspec ="[AccountName] IS NOT NULL AND [Location] IS NULL">
      <Name>Account</Name>

```

```
<BookId>1QA2-RX9XX</BookId>
<ListOfField>
  <Field>
    <FieldName>AccountName</FieldName>
  </Field>
  <Field>
    <FieldName>Location</FieldName>
  </Field>
  <Field>
    <FieldName>ExternalSystemId</FieldName>
  </Field>
</ListOfField>
</RecordType>
<RecordType>
  <Name>Acct Contact</Name>
  <BookId>1QA2-RX9XX</BookId>
  <ListOfField>
    <Field>
      <FieldName>Id</FieldName>
    </Field>
    <Field>
      <FieldName>AccountName</FieldName>
    </Field>
    <Field>
      <FieldName>ContactFirstName</FieldName>
    </Field>
    <Field>
      <FieldName>ContactLastName</FieldName>
    </Field>
  </ListOfField>
</RecordType>
<RecordType>
  <Name>CustomObject4</Name>
  <BookId>1QA2-RX9XX</BookId>
```

```
<ListOfField>
  <Field>
    <FieldName>Name</FieldName>
  </Field>
  <Field>
    <FieldName>Id</FieldName>
  </Field>
  <Field>
    <FieldName>ExternalSystemId</FieldName>
  </Field>
</ListOfField>
</RecordType>
<RecordType>
  <Name>CustomObject4 Contact ( CustomObject4 Id )</Name>
  <BookId>1QA2-RX9XX</BookId>
  <ListOfField>
    <Field>
      <FieldName>Id</FieldName>
    </Field>
    <Field>
      <FieldName>ContactFirstName</FieldName>
    </Field>
    <Field>
      <FieldName>ContactLastName</FieldName>
    </Field>
  </ListOfField>
</RecordType>
</ListOfRecordType>
</PersonalExtract>
```

## Specifying Record Types in Personal Extract Definitions

When creating a personal extract definition file, you must specify the record types that you want to extract in the definition file. For example:

```
<RecordType>
```

```
<Name>Acct Contact</Name>
```

...

```
<RecordType>
```

The record type name value that is specified in the personal extract definition file uses a name from the column, Object Name in the Access Profile XML File, in a table in an appendix of Oracle Migration Tool On Demand Guide. This value does not appear in the Oracle CRM On Demand UI. The field name values that are specified in the personal extract definition file are the Web Service v2.0 integration tag values for the specified record types. Administrators can retrieve the necessary information from Oracle CRM On Demand to populate correctly the personal extract definition file in two ways, as described in the following procedures.

### Specifying the Record Type and Fields Manually

You can find the required record type name in Oracle Migration Tool On Demand Guide and then find the field names in the WSDL file for that record type.

#### *To specify the record type and fields manually*

- 1 Using the default Display Name value for the record type, identify the corresponding value from the Object Name in the Access Profile XML File column.

For information on the Display Name value, see Oracle Migration Tool On Demand Guide.

- 2 Add the value to your personal extract definition file:

```
<RecordType>
```

```
<Name>Object Name in the Access Profile XML File</Name>
```

...

```
<RecordType>
```

- 3 Download the Web Services v2.0 Custom WSDL file for the top-level or child record type that you want to extract.

- 4 Find the `<ListOfObject>` element for the record type in the WSDL file.

In most cases, *Object* is equivalent to the default display name of the record type in Oracle CRM On Demand.

- 5 Add the set of fields that you want to extract to the `<RecordType>` element in the personal extract definition file.

The field names correspond to tags within the `<ListOfObject>` element:

```
<RecordType>
```

```
<Name>Object Name in the Access Profile XML File</Name>
```

```
<ListOfField>
```

```
<Field>
```

```
<FieldName>Integration Tag from WS v2.0 WSDL</FieldName>
```

```

    </Field>
    <Field>
      <FieldName>Integration Tag from WS v2.0 WSDL</FieldName>
    </Field>
    ...
  <RecordType>

```

## Specifying the Record Type and Fields by Using the Field Management Web Service

You can retrieve the required record type name and the field names by using the Field Management Web service, which is part of the Administrative Services API.

The elements returned in the SOAP response for the `FieldManagementRead` and `FieldManagementReadAll` methods include the following:

- **<ObjectName>**. The name of the record type.
- **<Name>**. The internal name of the field used by Oracle CRM On Demand.
- **<DisplayName>**. The name of the field used in the UI.
- **<IntegrationTag>**. The custom integration tag name of the field.
- **<GenericIntegrationTag>**. The default integration tag name of the field that Oracle CRM On Demand assigns.

For more information about the Field Management Web service, see Oracle Web Services On Demand Guide.

### To specify the record type and fields by using the Field Management Web service

- 1 Make a call to the Field Management Web service for each record type that you want to extract.
- 2 In the SOAP response, identify the `<ObjectName>` for the record type.
- 3 Add the `<ObjectName>` value to your personal extract definition file:

```

<RecordType>
  <Name>ObjectName value from Field Management API</Name>
  ...
</RecordType>

```

- 4 Add the set of fields that you want to extract to the `<RecordType>` element in the personal extract definition file.

The field names correspond to the `<IntegrationTag>` or `<GenericIntegrationTag>` value:

```

<RecordType>
  <Name>ObjectName value from Field Management API</Name>
  ...
  <Field>
    <Name>IntegrationTag value from Field Management API</Name>
  </Field>
  ...
</RecordType>

```

```
<ListOfField>
  <Field>
    <FieldName>Integration Tag value from Field Management API</FieldName>
  </Field>
  <Field>
    <FieldName>Integration Tag value from Field Management API</FieldName>
  </Field>
  ...
</RecordType>
```

## Managing Personal Extract Definitions

You can create, edit, or delete personal extract definitions. You can also download personal extract definitions from the Personal Extract Definition List page.

**Before you begin.** To perform these procedures, your user role must include the Manage Personal Extract privilege. You must have a valid personal extract definition XML file, see [About Personal Extract Definitions](#) (on page 549).

### *To add a personal extract definition*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section of the Admin Homepage, click the Import and Export Tools link.
- 3 On the Import and Export Tools page, click the Manage Personal Extract Definition link.
- 4 On the Personal Extract Definition List page, click New.
- 5 Select the type of personal extract definition: Default or Role.
- 6 If you selected Role for the type, select a role.
- 7 Select the Active checkbox.
- 8 In the File field, browse and add the personal extract definition file.
- 9 Click Save.

The personal extract definition file is validated to determine the following:

- Whether it is a well-formed XML file
- Whether the cardinality of the elements and attributes is correct
- That only valid XML tags are provided

If the PED is invalid, then an error message is displayed. If the personal extract definition file is valid, then the file is uploaded, and the name of the client application appears in the Client Name field, and



the file information is displayed in the File Extension, File Name, and File Size field in the Personal Extract Definition edit page.

The following procedure describes how to delete a personal extract definition.

#### ***To delete a personal extract definition***

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Data Management Tools section of the Admin Homepage, click the Import and Export Tools link.
- 3** On the Import and Export Tools page, click the Manage Personal Extract Definition link.
- 4** On the Personal Extract Definition List page, click Delete for the personal extract definitions that you want to delete, and then click OK.

## **Creating Personal Extract Requests**

To synchronize with Oracle CRM On Demand, a client application issues Web service calls to create a personal extract request based on a personal extract definition, and retrieve the data files generated from the request. The call to create a personal extract request can be made:

- By a user to create a personal extract request for themselves for a particular client,
- By an administrator to create a personal extract request for a particular user for a particular client.

For more information about these Web services, see Oracle Web Services On Demand Guide.

A user can have only one personal export request for a particular client application in process; that is, the request is queued, requeued, or processing. If a second request is received while the first request is being processed, then an error message is sent to the client application. A user can submit multiple personal extract requests but only if the specified client name value is different for each request. However, an administrator can request a personal extract for a user even if the user has submitted a request for the same client name value. When a personal data extract request is completed, an email message is sent to the user for whom the extract was requested.

## **Viewing Personal Extract Requests**

For users with either the Manage Personal Extract or Personal Export privilege, the pending and completed personal export requests are visible in the Personal Export Request Queue page. For the completed requests, you can drill down on a request to retrieve the CSV files. For each record type (parent or child) specified in the personal extract definition, there is a separate CSV file. For more information about the Personal Export Request Queue page, see Viewing Your Export Requests.

In the CSV files for personal export requests, the names of the record types and fields are the same as those used in the personal extract definition. In personal extract definitions, the field names are specified with the Web services v2.0 integration tags, and so the field names are used as the column headers in the CSV files. Custom fields have two integration tags:

- **Generic tag.** This tag is used in the Generic WSDL file.

■ **Custom tag.** This tag is used in the Custom WSDL file.

The integration tag that is used in the CSV file depends on whether the custom or generic tag is used for the field in the personal extract definition. Personal extract request files are purged after 7 days. For each client, only the latest files are retained for a user. If a user requests a new personal extract for a client, then any existing personal extract request files are purged.

## Batch Delete Queue Page

The Batch Delete Queue page displays all the active and completed delete record requests submitted by your company. From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps
Cancel an active request	When you delete the list of records from the record Lists page, you receive a confirmation email stating that the batch delete request has loaded successfully on the batch delete queue page. You can click the Cancel link to cancel the request until the Proceed link appears beside the request.
Proceed the active request	Click the Proceed link next to the request to finalize the batch delete request. You receive a confirmation email stating that the batch delete request has completed successfully and that the list of records is deleted.
Display the number of records	In the Number of Records Displayed drop-down list, select a number of requests to see at one time.
Delete the processed request	Click the Delete button to delete the batch delete request from the Processed Requests queue.
Log the processed request	Click the Log button to save the batch delete request as a log file.

## Batch Assign Book Queue Page

The Batch Assign Book Queue page displays all the active and completed book assignment requests submitted by your company. From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps
Cancel	Click the Cancel link next to the request. You can cancel a request until its status changes to 'In Progress'.
Display details of a request	Drill down on the list name for the request. On the request Detail page, you can view the request properties and request parameters.
Show more or fewer requests	In the Number of Records Displayed drop-down list, select the number of requests to see at one time.
Delete the processed request	Click the Delete link to delete the request from the Processed Requests queue.
Log	Click the Log link to save the request as a log file.

When the request has completed, you receive an email notification.

For information on creating batch assignment requests, see [Assigning Records to Books](#) (on page 253).

## About Integration Events

An *integration event* is a mechanism for triggering external processes based on specific changes (create, update, delete, associate, dissociate) to the records in Oracle CRM On Demand. Integration events contain information about the data that was changed by the user. This information is stored in one or more integration event queues as an XML file, which allows the details of events in Oracle CRM On Demand to be accessed by external applications. For example, an external application might need to track Account changes in Oracle CRM On Demand and trigger local updates accordingly.

For customers who require multiple applications to integrate with Oracle CRM On Demand independently, the company administrator can define multiple integration event queues. Using the integration event functionality, the same event can be generated for multiple queues, and the external applications are guaranteed queue integrity, because the external applications can be configured to request only the events from a specific queue.

## About Setting Up Integration Event Administration

If you are a new customer, the integration event functionality is automatically enabled. However, if you are an existing customer, the Oracle CRM On Demand integration event functionality must be configured by Customer Care and by your company administrator. Contact Customer Care to request support for Integration Event Administration and to specify the maximum total size of the integration event queues.

**Note:** The maximum size of the integration queues is not displayed on your Company Profile page.

When Customer Care has set up the integration event functionality, the Integration Event Administration link is visible in the Data Management Tools section of the Admin Homepage. Also, the Administrator user role has the Enable Integration Event Access privilege enabled. For more information about user roles, see [Adding Roles](#) (on page 210).

## About Creating, Storing, and Accessing Integration Events

To trigger the creation of integration events, you must create workflow rules with Create Integration Event actions. For each such action, you can specify which fields on a record are to be tracked. When the value changes in a tracked field, the change is recorded in an integration event. You can also specify to which queues the integration events are written. For more information about workflow rules, see [About Workflow Rules](#) (on page 277).

Integration events are stored in one or more queues, the maximum total size of which is specified for your company by the Customer Care representative. A default integration event queue is provided, and you can create additional queues.

When a queue is full, any new integration events are not stored. When the number of integration events in the queue is again below the maximum, new events will once again be added to the queue.

On the Integration Event Settings page, you can delete integration events from a queue. You can also configure Oracle CRM On Demand to send a warning email to a specified address when the queue is full, or when the number of integration events in the queue exceeds a number that you specify.

You can disable integration event queues, including the default queue, but you cannot delete a queue.

External applications access the integration event queues by using the Integration Events Web service, which has two methods:

- **GetEvents.** Retrieves integration events from a queue.
- **DeleteEvents.** Deletes integration events from a queue.

For information about downloading the Web Services Description Language (WSDL) file for the Integration Events Web service, see [Web Services Integration](#) (on page 543). For more information about the Integration Events Web service, see Oracle Web Services On Demand Guide.

Sometimes an integration event queue can contain events that a client application cannot process. For information about how to handle such bad events, see Oracle Web Services On Demand Guide.

- For a step-by-step procedure for creating an integration event queue, see [Creating Integration Event Queues](#) (on page 564).
- For a step-by-step procedure to manage the integration event queues, see [Managing Integration Event Settings](#) (on page 565).
- For a step-by-step procedure to create workflow rules that trigger integration events, see [Creating Workflow Rules](#) (on page 288).

## Creating Integration Event Queues

When Integration Event support is enabled, a default integration event queue is provided with Oracle CRM On Demand. However, you can also create additional queues and specify to which queues individual integration events are written.

**Before you begin.** Integration Event Administration must be set up for your company, as described in [About Integration Events](#) (on page 563). When Integration Event Administration is set up, the maximum number of integration events allowed in the queues is configured as part of your company profile. To perform the following procedure, your user role must have the Enable Integration Event Access privilege.

**To create an integration event queue**

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section, click the Integration Event Administration link.
- 3 On the Integration Event Administration page, click the Integration Event Queue Management link.
- 4 On the Integration Queue Management page, click New Queue.
- 5 On the Integration Event Queue Settings Page, complete the following fields, and click Save.

Field	Comments
Queue Name	Enter the name for the queue. Required field.
Description	Enter a description of the usage of the queue.
Disabled	Ensure that this check box is deselected.
Queue Size	<p>Enter the size of the queue. This size cannot exceed the size shown in the Unassigned Queue Capacity field. Required field.</p> <p>The Integration Event File Limit field shows the total number of events that the company can store for all queues. If the size of the existing queues matches this number, you cannot create a new queue.</p>
Notification Email Address	Enter an email address if a warning email is to be sent when the queue is full or when the queue reaches a certain size.
Send Warning Email When The Number Of Queued Transactions Reaches	Specify the size that the queue is allowed to reach before a warning email is sent to the address specified in the Notification Email Address field.

## Managing Integration Event Settings

You can edit the settings for all of the integration event queues.

**Before you begin.** Integration Event Administration must be set up for your company, as described in [About Integration Events](#) (on page 563). When Integration Event Administration is set up, the maximum number of integration events allowed in the queue is configured as part of your company profile. To perform the procedures described here, you must have the Enable Integration Event Access privilege in your user role.

### ***To manage integration event settings***

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** In the Data Management Tools section, click the Integration Event Administration link.
- 3** On the Integration Event Administration page, click the Integration Event Queue Management link.
- 4** On the Integration Queue Management page, click the Edit link for the queue.
- 5** On the Integration Event Queue Settings page, you can perform the following tasks:

Task	Action
Disable a queue.	Select Disabled to disable all queues, including the default queue.
Update the size of a queue.	<p>Enter a value in the Queue Size field. This size cannot exceed the size shown in the Unassigned Queue Capacity field.</p> <p>The Integration Event File Limit field shows the total number of events that the company can store for all queues. If the size of the existing queues matches this number, you cannot increase the size of the queue.</p>
Delete transactions from a queue.	<p>To delete all transactions in the queue, select the When I Click Save, Clear All Transactions check box, and then click Save to delete the transactions.</p> <p>To Delete older transactions, click the calendar icon, and select a date in the When I Click Save, Clear Transactions Older Than field. Click Save to delete the transactions.</p>
Configure Oracle CRM On Demand to send a warning email when the queue is full or when the queue reaches a certain size.	Enter the email address, and (optionally) specify the size that the queue is allowed to reach before the warning email is sent. Click Save to save the email configuration.
Specify how the values of the Date and Time fields (for example, ModifiedDate, CreatedDate) are recorded in the integration events.	<p>Select a value from the Time Zone field:</p> <ul style="list-style-type: none"> <li>■ Select UTC to record the dates and times in Universal Time Code (UTC) format.</li> <li>■ Select User Time Zone to record the dates and times according to the time zone of the user who updated the record. This is the default value.</li> </ul>
Specify whether picklist values are recorded in integration events in the user's language or as language-independent code (LIC) values.	<p>Select a value from the Picklist Format field:</p> <ul style="list-style-type: none"> <li>■ Select Language Independent Values to record picklist values as LIC values.</li> <li>■ Select User Language to record picklist values in the user's language. This is the default value.</li> </ul>

Task	Action
	Note: The LIC values of picklists are usually the same as the ENU values.

**NOTE:** The Picklist Format and Time Zone fields are set for the default queue only. All other queues inherit the setting selected for the company's default queue. These fields are displayed for all queues configured for a company but are read-only for queues other than the default queue.

## Content Management

Companies often want to keep track of the products in which their customers express interest and which they subsequently purchase. To help your company's employees track product information, you can set up a product catalog. Setting up the product catalog consists of grouping products under categories (if required) and then setting up the products under each category. Products include recurring or one-time products, services, and training options.

The following sections describe ways in which tracking of products is useful in Oracle CRM On Demand:

### Opportunities

A sales representative working on a sales opportunity can create an opportunity record to track the details of a customer's interests, including the potential revenue for the deal. A customer might be interested in several products and might consider purchasing a service contract as well. The sales representative can scroll down to the Products section of the opportunity record to link the product records for each of the items that the customer might buy. For the service contract, billed monthly, the sales representative can also record recurring revenue information. In this way, the opportunity record gives complete information about a potential deal, and allows your company to:

- Track the products belonging to each opportunity
- Calculate revenue streams generated over time based on those products (recurring and non-recurring products)

### Assets

Both sales and service professionals find it helpful to know which of your company's products and services a customer has already purchased. In Oracle CRM On Demand, you can track purchased products or assets by linking product records to a customer's account or contact record.

### Forecasts

A forecast is a periodic snapshot of sales performance compiled from individual opportunity or product records. An advantage of linking products to opportunity, account, or contact records is that a company can then determine whether to generate forecasts based on product and recurring revenue.

If your company bases its forecasting on product revenue rather than opportunity revenue, your employees can specify which products should be used for the forecast totals.

Click a topic to see step-by-step instructions for the procedures pertaining to Content Management:

- [Setting Up Product Categories](#) (on page 568)
- [Setting Up Company Products](#) (on page 569)
- [Setting Up Price Lists for PRM](#) (on page 571)
- [Managing Your Company's Attachments](#) (on page 574)
- [Setting Up Assessment Scripts](#) (on page 575)
- [Setting Up Report Folders](#)

## Setting Up Product Categories

If your company's product list is long, it is a good idea to organize products in logical groupings, each with a name that is meaningful at your company. These groupings are called product categories. Categories help you search for a product or set of products because they allow you to sort the list to quickly find what you need. The product categories also allow your employees to quickly identify the correct product to link to their opportunities. For example, an office equipment company might set up these categories: Copiers, Fax Machines, Service, and Supplies.

You can have as many categories and subcategories (children) as you want.

### Before you begin:

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If your product categories have not been defined at your company, determine the categories and subcategories before setting up the information in Oracle CRM On Demand. When entering information, start from the top parent categories, and then add the children categories.

### *To set up your product categories*

- 1 In the upper right corner of any page, click the Admin global link.
  - 2 In the Content Management section, click the Content Management link.
  - 3 Click the Product Categories link.
  - 4 On the Product Categories List page, do one of the following:
    - To add a category, click New.
    - To update category information, click Edit for the appropriate record.
- NOTE:** To limit the records displayed on this page (and make it easier to find the existing category), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.
- To add a child category to an existing category, click the link in the Category Name column, and then click New in the Child Categories section.



- 5 On the Category Edit page, enter the required information. The Category Name character limit is 100.
- 6 Save the record.

## Setting Up Company Products

### Before you begin:

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If you are grouping products under categories, set up the categories before you define your products.

To allow employees to link products to opportunities, you need to set up your product inventory. When defining the products, mark the ones that you want to be on the list of products that your employees can order from (so that they can link products to their opportunities).

### To add products

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Content Management section, click the Content Management link.
- 3 In the Product Catalog section, click the Products link.
- 4 On the Product List page, do one of the following:
  - To add a product, click New.
  - To update product information, click Edit for the required record.

**NOTE:** To limit the records displayed on this page (and make it easier to find the existing product), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.

- 5 On the Product Edit page, complete the information and save the record.

**NOTE:** To make the product available to employees (so they can link it to their opportunities), make sure the Orderable check box is selected.

**TIP:** You cannot delete products. Instead, you need to make the product inactive by clearing the Orderable check box. This removes the product from the list of products that your employees can select.

The following table describes field information for products. Company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table. (For additional information on product fields see Product Fields.)

Field	Description
<b>Key Product Information</b>	
Product Category	Specific to Oracle CRM On Demand Financial Services Edition and Oracle CRM On Demand Life Sciences Edition.

Field	Description
Class	Grouping of products to which the product belongs. Specific to Oracle CRM On Demand Life Sciences Edition.
Price Type	Specific to Oracle CRM On Demand Life Sciences Edition.
Parent Product	Specific to Oracle CRM On Demand Life Sciences Edition.
Product Type	<p>Specific to Oracle CRM On Demand Automotive Edition and Oracle CRM On Demand Life Sciences Edition.</p> <p>If you are defining an Automotive product, the Product Type field must be set to Vehicle.</p> <p>If you are defining a Sample Drop product (where Type is set to Sample), the Product Type field must be set to Sample or remain empty.</p>
Therapeutic Class	Specific to Oracle CRM On Demand Life Sciences Edition.
Part #	The part number for the product.
Orderable	Select this field to make the product available to your employees. If you do not select Orderable, the product does not show up in the product list.
Type	<p>The type of product, which can be one of the following: Product, Service, Training, Market, Competitor, Detail, Sample, or Promotional Item. For Oracle CRM On Demand Life Sciences Edition, you must select the following values for Type:</p> <ul style="list-style-type: none"> <li>■ Detail, if the item is a Product Detail</li> <li>■ Sample, if the item is a Sample Drop</li> <li>■ Promotional Item, if the item is a Promotional Item Drop</li> </ul> <p>Selecting these types, filters the type of products (product details, samples, or promotional items) that are visible in the sales representative's Sample Drop, Product Detail or Promotional Items pick lists.</p> <p><b>NOTE:</b> If the Type is Sample, the Product Type field must also be set to Sample or remain empty.</p>
Sub Type	Specific to Oracle CRM On Demand Life Sciences Edition.
Status	The status of the product.
Revision	Specific to Oracle CRM On Demand Life Sciences Edition.
Serialized	Specific to Oracle CRM On Demand Life Sciences Edition.
Lot Number Tracking	Specific to Oracle CRM On Demand Life Sciences Edition.
Controlled	Indicator that the product is controlled. Specific to Oracle CRM On

Field	Description
	Demand Life Sciences Edition.
<b>Additional Information</b>	
Description	Additional information about the product. This field has a limit of 255 characters.

## Setting Up Price Lists for PRM

Brand owners can maintain and publish price lists for their products, so that partners can use them when creating special pricing requests. Brand owner administrators can create multiple price lists and can associate each account or partner organization with one of them. Multiple products can be assigned to a price list and given a specific price.

On a special pricing request, the customer price list determines the Manufacturer's Suggested Retail Price (MSRP) of the products, and the owner partner price list determines the reseller purchase cost. Maintaining these prices in price lists streamlines administration and facilitates the special pricing process.

**NOTE:** Access to price lists is restricted to brand owner administrators who have the specific privilege of Manage PRM Access.

### To create a price list

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Content Management section, click Content Management.
- 3 In the Product Catalog section, click Price Lists.
- 4 On the Price List page, do one of the following:
  - To add a price list, click New.
  - To update price list information, click Edit for the required record.

**NOTE:** To limit the records displayed on this page, click the menu in the title bar, and change the selection. The list contains the standard lists distributed with Oracle CRM On Demand along with the lists that you or your managers created.

- 5 On the Price List Edit page, complete the information.

The following table describes the field information for price lists. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
<b>Key Price List Information</b>	

Field	Description
Price List Name	The name of the price list.
Effective From	The date that begins the effective period during which the indicated price list is valid.
Effective To	The date that ends the effective period during which the indicated price list is valid. If this field is empty, then the price list is effective indefinitely.
Type	<p>The type of price list. The valid values are: DIST COST and MSRP.</p> <p>DIST COST contains the distributors' costs, which are the original stocking costs that the partner or reseller must pay to purchase products from the brand owner.</p> <p>MSRP contains the Manufacturer's Suggested Retail Prices, which are the prices that the brand owner recommends for products sold to customers.</p> <p>New price list types can be added through customization. However, the values provided by default must not be changed. If they are changed, then the corresponding fields on the special pricing requests will not be populated using the price lists.</p>
Status	The current status of the price list (In Progress or Published). The default value for all new price lists is In Progress. When a price list can be made available to users, change its status to Published.
Currency	The type of currency used by the price list. All prices in a price list are in the same currency, which is defined when the price list is created. On saving the new price list record, this field becomes read-only and further updates to the record are not allowed.
<b>Additional Information</b>	
Created	The name of the person who created the price list, as well as the date and time when the price list was created.
Modified	The name of the person who last modified the price list, as well as the date and time when the price list was most recently modified.
Description	Additional information about the price list. This field has a limit of 2,000 characters.

## Publishing Price Lists

After a price list has been updated by the administrator, it can be published to users and used when creating special pricing requests.

### *To publish a price list*

- 1 Select a price list that you want to publish from the Price Lists section of the Content Management administration area.

For information on selecting special pricing requests, see Finding Records.

- 2 On the Price List Detail page, click Edit.
- 3 On the Price List Edit page, choose Published from the Status menu.
- 4 Click Save.

When you change the status to Published, the following occurs:

- The price list becomes available for selection on the price list pick applet and can be associated with an account or partner organization.
- If the price list has been associated with a customer or partner on a special pricing request, then upon creation of each special pricing product, the price list is used to populate the Manufacturer's Suggested Retail Price (MSRP) and the partner Purchase Cost.
- On the special pricing request, the End Customer Price List is used for the former and the Owner Partner Price List for the latter. The following conditions should also be met:
  - The Price List associated with the End Customer is of type 'MSRP' and the Price List associated with the Owner Partner is of type 'DIST COST'.
  - The status of this Price List is 'Published'.
  - The Product that is added on the special pricing request exists on this Price List.
  - The Start Date of the special pricing request falls between the Effective From/To dates of the Price List (and the Price List Line Item).

## Adding Price List Line Items

After creating a price list you add products to it. Each price list can contain multiple products, but a single product can be listed only once.

### *To add a product to a price list*

- 1 On the Price List list page, click a price list name.
- 2 On the Price List detail page, click Add in the Price List Line Item section.
- 3 On the Price List Line Item Edit page, complete the information.

**Note:** You can also access the Price List Line Item Edit page from a Product Edit page.

The following table describes the field information for price list line items. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
<b>Key Price List Information</b>	
Price List	The name of the price list.
Product	Select the product for the price list line item.

Field	Description
Effective From	The date that begins the effective period during which the indicated price list is valid. This date must be within the price lists Effective From and Effective To dates.
Effective To	The date that ends the effective period during which the indicated price list is valid. If this field is empty, then the price list is effective indefinitely.
Price Type	Denotes the type of the price (such as Standard, Recurring, and so on). This field is available for future use. The current default value is Standard.
List Price	The price for the line item during the indicated effective period.
<b>Additional Information</b>	
Created	The name of the person who created the price list, as well as the date and time when the price list was created.
Modified	The name of the person who last modified the price list, as well as the date and time when the price list was most recently modified.
Description	Additional information about the price list. This field has a limit of 2,000 characters.

## Managing Your Company's Attachments

From the Content Management section of the Admin Homepage, you can access the Manage Attachments page, where you can review attachments.

**NOTE:** The Manage Attachments page shows only the attachments that are linked to parent records through the preconfigured Attachments related item. The Manage Attachments page does not show attachments that are linked to parent records through custom attachment record types, or attachments that are added to records through attachment fields. For a list of the record types that support the preconfigured Attachments related item, see [About Attachment Configurations](#) (on page 135).

Reviewing attachments helps you to determine:

- Which file attachments are taking up large amounts of storage space
- Which files have been attached more than once

If a file has been attached more than once, consider placing the attachment on a common shared location and directing users to replace attachments with the path to those files.

- Which users need to be reminded of the storage issues for large attachments

**Before you begin.** To perform the procedures for managing attachments, your role must include the Manage Attachments privilege.

### *To review attachments*

- 1 In the upper right corner of any page, click the Admin global link.

- 2 In the Content Management section, click the Content Management link.
  - 3 In the Manage Attachments section, click the Manage Attachments link.
  - 4 Do any of the following:
    - To view the attachment, select View in the record-level menu for the attachment. This opens the file or takes you to the URL address.
    - To delete the attachment, select Delete in the record-level menu for the attachment. The deleted file or URL is moved to the Deleted Items page and is permanently removed from the database after 30 days.
    - To replace the file or URL with a different one, click Replace. On the Edit page, enter the required information and save the record.

For complete instructions, see [Attaching Files and URLs to Records](#).

  - To limit the attachment records displayed in the list, click the drop-down menu and change the selection.
- The drop-down list contains standard lists distributed with the application.

## Setting Up Assessment Scripts

You can set up assessment scripts to help users to follow consistent processes when collecting data and making decisions. The assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, and so on. The assessment responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

With Oracle CRM On Demand, you can set up assessment scripts that allow your company to:

- Capture activity information for a sales call, task, or appointment.
- Conduct satisfaction surveys with customers.
- Gather responses to business plans.
- Automate the qualification of leads.
- Gather responses to objectives.
- Assess opportunities (by enforcing a sales methodology at your company).
- Conduct customer satisfaction surveys for contact and service request records.
- Use call scripts for service request records.

To find out more about assessment scripts, or to see step-by-step instructions for creating assessment scripts, see the following:

- [About Assessment Scripts](#) (on page 576)
- [Creating Assessment Scripts](#) (on page 579)

## About Assessment Scripts

An *assessment script* is a series of questions that helps users to collect customer data. Assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, capture activity information, and so on.

You can score customer answers, assign different weights to questions, and set thresholds for establishing decisions. In addition, you can map fields used during the assessment to the parent record and, later, run reports and analyses, based on those fields.

## How Are Assessment Scripts Used?

The process of using an assessment script is as follows:

- 1 The user launches an assessment script from a record detail page. The appropriate assessment scripts (determined by specified record field values) are listed on the record detail page. The user can also search for other assessment scripts, if necessary.
- 2 Working through the assessment questions, the user gathers critical customer information, such as details about the quality of a sales lead, and selects the correct response for each question from a drop-down list of choices.
- 3 Based on the responses, a score is automatically calculated, and the record is updated. For example, a lead is classified as qualified or rejected.
- 4 The answers to the questions are mapped as field values in the record, so that the answers are easily accessible, and available for reporting.
- 5 The completed assessments are stored and can be accessed in a related records section of the parent record.

## Which Type of Assessment Script Should You Create?

You can set up a number of different types of assessment scripts. Each script type is suitable for a specific task. Use the script types as follows:

- **Account Survey:** Use this type to conduct surveys with individual customers.
- **Activity Assessment:** Use this type to capture valuable contact and account call information.
- **Business Plan Assessment:** Use this type to allow sales representatives to gather information that will help to determine the effectiveness of business plans.
- **Contact Script:** Use this type to conduct customer satisfaction surveys with individual contacts.
- **Lead Qualification:** Use this type to help sales representatives to identify the qualified leads. Using a script for this task reduces the need for training and enforces consistent lead qualification.
- **Objective Assessment:** Use this type to allow sales representatives to gather information that will help to determine the effectiveness of objectives.
- **Opportunity Assessment:** Use this type to embed sales methodologies and help sales representatives to assess the opportunities so that they can adjust their sales strategies as they work on deals.



- **Service Request-Script:** Use this type to help service representatives to assess service requests; for example, to determine the priority or the escalation path for the request. Using a script for this task reduces the need for training and enforces consistent customer service.
- **Service Request-Survey:** Use this type to administer customer satisfaction surveys (that are linked to a specific service event.)

Each type of assessment is linked to a corresponding record type: Appointment, Sales Call, or Task; Account; Business Plan; Contact; Lead; Objective; Opportunity; or Service Request. If necessary, you can create multiple assessments of each type and present the appropriate script to the user. The script is based on the specified record criteria.

## Process of Creating Assessment Scripts

You must complete several tasks to set up an assessment script.

### 1 Customize the assessment script filters.

The filters allow you to define the criteria used to identify the appropriate assessment for a task, based on the specified record field values.

For example, a lead qualification assessment script might be set up with these filters:

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

Then, when a user launches an assessment script from a lead record with the corresponding values, the correct lead qualification script is listed.

All assessment script types use the same four filter fields, each with a defined picklist of values. To customize the filters, you must:

- a Enter the filter field display names and picklist values for every record type for which you want to create an assessment script.

For more information, see [Creating Assessment Scripts](#) (on page 579).

- b Add the filter fields to the page layouts for every record type for which you want to create an assessment script.

### 2 Create the assessment script:

- a Enter the script details.
- b Add criteria (questions) to the script.
- c Add a list of potential answers for each question.

For more information on these steps, see [Creating Assessment Scripts](#) (on page 579).

### 3 Give users access to the script:

- a For each user role that must use assessment scripts, configure the user role and the access profiles:

- **To create assessments.** For a user to be able to create assessment scripts, you must give the user's role access to the Assessment record type, which means that the access-level setting for the default and owner access profiles for the user's role must be set to at least Read/Edit for the Assessment record type. Also, the record type access-settings for the role must have the Has Access and Can Create check boxes selected for the Assessment record type.
- **To view assessments.** For a user to be able to view the details of an assessment, you must give the user's role read access to the Assessment record type, which means that the access-level setting for the default and owner access profiles for the user's role must be set to at least Read-Only for the Assessment record type. Also, the record type access-settings for the role must have the Has Access and Can Read All Records check boxes selected for the Assessment record type.

For more information about setting up user roles, see [Adding Roles](#) (on page 210). For more information about setting up access profiles, see [Process of Setting Up Access Profiles](#) (on page 200).

- b For each record type for which you have created assessment scripts, add the appropriate assessment script section to the displayed information on the record detail page. For more information about customizing page layouts, see [Customizing Static Page Layouts](#) (on page 89).

## Example of an Assessment Script

A typical script that a company administrator might want to set up is a Lead Qualification script, which is used to determine whether a lead is to be qualified or rejected.

The following table shows the example values that might be used for such a script.

Script Field	Example Value
Type	Lead Qualification
Threshold Score	50
Outcome Value If Threshold Met	Qualified
Outcome Value If Threshold Not Met	Disqualified
Field to Map Outcome Value To	Description

**CAUTION:** If a Lead Qualification script attempts to set the Status field on a lead to Qualified, it will not be able to do so unless the Rating and Sales Person fields on the lead are filled in. If these fields are not filled in, an error message is displayed, and the script assumes the lead has failed to meet the threshold. The script then sets the Status field according to the results defined on the script for failing to meet the threshold.

Some examples of criteria for the Lead Qualification script are shown in the following table.

Criteria	Weight
What is the current state of your budget?	50
What is driving the timeline for this project?	25
When is it planned to make a decision?	25

Examples of answers and scores for the question "What is the current state of your budget?" are shown in the following table.

Answer	Score
Budget Approved	100
Budget Rejected	0

The score for each criterion is calculated by multiplying the weight of the criterion by the score for the answer, where the weight is a percentage. In this example, if a user chooses the answer Budget Approved, the score for the question is calculated as follows:

$$(0.5 * 100) = 50$$

The total score for the script is the sum of the scores for all the criteria. If the final outcome of the script meets or exceeds the threshold defined in the script, the value of the Description field on the Lead Detail page is set to Qualified. If the score falls below the threshold, the value of the field is set to Disqualified.

When assessment scores are calculated, the following rules apply:

- Scores for individual questions are rounded to the nearest single decimal place.
- The overall assessment score is rounded to the nearest whole number.
- Rounding rules are based on standard mathematical rules, so that a decimal value of less than 0.5 is rounded down, while a decimal value of 0.5 or greater is rounded up.

## Creating Assessment Scripts

To customize assessment script filters and create an assessment script, follow the steps in this topic.

### Before you begin:

- To perform this procedure, your user role must include the Administer Assessments privilege.
- If necessary, customize the picklist values and fields you want to use as part of the assessment criteria. For example, you can add custom fields to display information collected during the customer interview. When you set up the script, you can map the answers to those custom fields.

Be sure to add any new fields to the page layout for that record. For instructions, see [Customizing Static Page Layouts](#) (on page 89).

**NOTE:** You cannot translate the components of assessment scripts directly in Oracle CRM On Demand. If you want to use an assessment script in more than one language, you must create a version of the script in each language.

You can use assessment script filters to identify which script is the appropriate one to present to a user for a task, based on specified record criteria. The following procedure describes how to customize assessment script filters.

### To customize assessment script filters (optional)

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 Under Record Type Setup, click Assessment.

- 4 Click Assessment Field Setup.
- 5 Click Edit and edit the Display Name column for each of Filter 1, 2, 3, and 4.
- 6 For each field, click Edit Picklist and set up the values for the picklist.  
**TIP:** Keep the default <No Values> value at the top of the picklist options, unless you want to force your employees to select something from the picklist.
- 7 Save the record.
- 8 To relabel these fields in the record pages that your employees use, go to the Field Setup section for each of the record types you are running assessment scripts with.  
**NOTE:** The same picklist values you set up for Assessment Fields are displayed in these other records. However, you can customize the display name for these fields for each record type.

### **To create an assessment script**

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Content Management link.
- 3 Click the Assessment Scripts link.
- 4 On the Assessment List page, click New Assessment.
- 5 On the Assessment Edit page, complete the information.

The following table describes field information for assessments. An administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Name	Limit of 50 characters.  Use a descriptive name that includes the purpose of the script. If your company employees use various languages, include the language in the script name.
Type	Determines the record type the script is linked to. The available options are: Account Survey, Activity Assessment, Business Plan Assessment, Contact Script, Lead Qualification, Objective Assessment, Opportunity Assessment, Service Request - Script, and Service Request - Survey.
Active	Only scripts that are active are available to users.
Filter 1, 2, 3, 4	Displays the label that you set up for the assessment category.
Threshold Score (1-100)	Used to calculate the outcome of the scripts. If the score of the script is equal to or higher than the threshold, the outcome is met.
Field to Map Score To	Determines the field to display the score in the parent record.
Outcome Value If Threshold	(Optional) Determines the value to display if the outcome is met.

Field	Description
Met	For example, if the lead meets the criteria for qualification, this field can display <i>Qualified</i> .
Outcome Value If Threshold Not Met	(Optional) Determines the value to display if the threshold is not met. For example, if the lead does not meet the criteria for qualification, this field can display <i>Rejected</i> .
Field to Map Outcome Value To	(Optional) Determines the field to display the outcome in the parent record when the script is completed.
Remove Comment Box	Select this check box to remove the ability to add comments when completing an assessment. If this check box is deselected, then a comment box is visible, and you will be able to enter a comment when completing an assessment.
Response Control	Determines the control that will be used for adding responses to assessment criteria. The options are: Drop Down or Radio Button.

**NOTE:** An assessment script must be active and have at least one criterion defined before it is displayed on the Record Detail page.

- 6 Click Save.
- 7 On the Assessment Detail Page, in the Criteria section, click New or Edit.
- 8 On the Criteria page, complete the information.

The following table describes the fields you complete for the criteria.

Field	Description
Order	Determines the sequence of the questions presented to the user when the user is completing the assessment.
Criteria Name	A short, descriptive name that summarizes the question. The field has a limit is 20 characters.
Question	A question that the user answers. The field has a limit of 50 characters.
Weight	A percentage between 0 and 100 to indicate the importance of the question.  The sum of the weights for all questions must equal 100.
Answer Map to Field	Specify a field on the parent record for mapping the answer to the question in the Question field. Mapping answers to the parent record makes the values available in integration, reporting, and lists.

- 9 On the Assessment Detail Page, click each criterion name and then click the New or Edit button in the Answers section.
- 10 On each Answers page, complete the information:

Field	Description
Order	Determines the sequence of the answers presented to the user when the user is completing the assessment.
Answer	Enter a valid answer for the user to select for the question. Limit is 30 characters.
Score	The number of points associated with the answer.  The score for the selected answer is multiplied by the weight of the associated question to determine the total question/answer score.

**11** Save your changes.

**NOTE:** For each user role that must use assessment scripts, you must configure the user role to provide access to assessment scripts. For information on the settings that are required for the user role, see [About Assessment Scripts](#) (on page 576).

**TIP:** Be sure each role has a page layout that includes the new fields you added for assessment.

## Life Sciences Management

Using the Admin global link and the Life Sciences Management section of the Admin Homepage, you can perform the following tasks:

- Manage and delete smart call templates. For more information, see [Managing Smart Calls](#) (on page 582).
- Set up Life Sciences related preferences. For more information, see [Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State License](#) (on page 585).
- Designate which contacts to sample. For more information, see [Authorizing Contacts to Receive Samples](#) (on page 586).

## Managing Smart Calls

You can manage smart calls if your user role has the appropriate access level for the Smart Call record type (either Default or Owner access). You can review, edit, and update the details and line items attached to a smart call from the Manage Smart Call Templates page. After editing, the revised smart call template can be applied as required, and saved as either a public or private template.

**NOTE:** You cannot duplicate smart call templates. Each smart call template must be unique.

### *To manage smart calls*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Smart Call Management link.
- 3 On the Manage Smart Call Templates page:

- To review the smart call, click the link in the Subject column.
- To delete the smart call, click Delete in the appropriate row.
- To edit the details of a smart call, click Edit in the appropriate row.

For information about the fields on the Call Edit page, see [Tracking Visits \(Sales Calls\) to Customers](#).

- To edit a smart call line item, click the link in the Subject column, go to the appropriate section on the Smart Call Detail page, then click Edit next to the appropriate line item.
- To delete a smart call line item, click the link in the Subject column, go to the appropriate section on the Smart Call Detail page, then click Delete next to the appropriate line item.
- To add a new line item to the smart call, click the link in the Subject column.

For more information about adding line items to a smart call, see the tasks that follow.

- Revised smart call templates can be applied in the normal way and saved as either public or private templates, as described in the following tasks in [Tracking Visits \(Sales Calls\) to Customers](#):
  - To track a visit (sales call) to a customer
  - To save the call information as a template

#### 4 On the Manage Smart Call Templates page, click the Menu button.

The following table describes the tasks that you can perform from the Menu button on the Manage Smart Calls Templates Page.

To do this	Follow these steps
Batch Assign Book	On the Manage Smart Call Templates title bar, click Menu, and select Batch Assign Book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 253).
Refine List	On the Manage Smart Call Templates title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> .
Save List	On the Manage Smart Call Templates title bar, click Menu, and select Save List.
Show List Filter	On the Manage Smart Call Templates title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> .
Manage Lists	On the Manage Smart Call Templates title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> .
Create New Lists	On the Manage Smart Call Templates title bar, click Menu, and select Create New Lists. Complete the steps described in <a href="#">Creating and Refining Lists</a> .

The following procedure describes how to link product detailed information to a smart call record.

### ***To link product detailed information to a smart call record***

- 1 On the Smart Call Detail page, scroll down to the Products Detailed section, and click New.  
**NOTE:** If the Products Detailed section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Products Detailed section to your page layout. If the section is not available to add to your page layout, contact your company administrator.
- 2 On the Product Detailed Edit page, enter the required information.  
For more information about the fields on the Product Detailed Edit page, see the following task in Tracking Visits (Sales Calls) to Customers: To link product detailed information to a call record.
- 3 Save the record.

Repeat these steps, as required, to add more Product Detailed line items to the smart call record.

The following procedure describes how to link samples dropped information to a smart call record.

### ***To link samples dropped information to a smart call record***

- 1 On the Smart Call Detail page, scroll down to the Samples Dropped section and click New.  
**NOTE:** If the Samples Dropped section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Samples Dropped section to your page layout. If the section is not available to add to your page layout, contact your company administrator.
- 2 On the Samples Dropped Edit page, enter the required information.  
For more information about the fields on the Samples Dropped Edit page, see the following task in Tracking Visits (Sales Calls) to Customers: To link samples dropped information to a call record.
- 3 Save the record.

Repeat these steps, as required, to add more Samples Dropped line items to the smart call record. For additional information on samples dropped, see Dropping Samples During a Sales Call.

The following procedure describes how to link promotional items, educational items, or other marketing items to a smart call record.

### ***To link promotional items, educational items, or other marketing items to a smart call record***

- 1 On the Smart Call Detail page, scroll down to the Promotional Items section, and click New.  
**NOTE:** If the Promotional Items section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Promotional Items section to your page layout. If the section is not available to add to your page layout, contact your company administrator.
- 2 On the Promotional Item Dropped Edit page, enter the required information.  
For more information about the fields on the Promotional Item Dropped Edit page, see the following task in Tracking Visits (Sales Calls) to Customers: To link promotional items, educational items, or other marketing items to a call record.



- 3 Save the record.

Repeat these steps, as required, to add more Promotional Items line items to the smart call record.

The following procedure describes how to link book information to a smart call record.

#### ***To link book information to a smart call record***

- 1 On the Smart Call Detail page, scroll down to the Books section, and click New.

**NOTE:** If the Books section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Books section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- 2 On the Books page, enter the required information.

For more information about the fields on the Books Edit page, see [Book Fields](#) (on page 255).

- 3 Save the record.

Repeat these steps, as required, to add more Book line items to the smart call record.

## **Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State License**

Administrators can set the maximum number of times a contact who does not have a valid state license can be sampled. This setting is set at the global level and applies throughout the organization. Configuring this setting ensures the following:

- That sales representatives in the field will not be able to exceed the specified maximum number of times contacts who do not have a valid state license can be sampled.
- That when a contact moves to a different state, the contact can be sampled while waiting for a valid state license. Typically, contacts must wait a few days to receive a valid license when they move to a different state.

**Before you begin.** To set the maximum number of times contacts can be sampled without a valid state license, your user role must include the Enable Basic Samples Operations privilege.

#### ***To set the maximum number of times contacts can be sampled without a valid state license***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Life Sciences Management section, click the Other Life Sciences Related link.
- 3 On the Life Sciences Related Preferences page, click the Life Sciences Related Preferences link.
- 4 Enter a value in the Number of Times a Contact Can Be Sampled field.

The default value in this field is -1, which indicates that the maximum number of times contacts can be sampled without a valid state license has not been set and that there will be no impact on current behavior. Setting the value in this field to any negative number will have the same effect.

Setting the value in this field to a number greater than zero indicates that you are setting the maximum number of times contacts can be sampled without a valid state license and the impact on behavior is as follows:

- Sales representatives will be able to sample contacts who are waiting for a valid state license x number of times, where x is the value in this field, provided that the status of the license is inactive or not null and that the license has not expired.

**NOTE:** To distribute samples to a contact, that contact type (for example, physician, pharmacist, nurse practitioner, doctor) must be authorized to receive and sign for samples. For more information, see [Authorizing Contacts to Receive Samples](#) (on page 586).

- If a contact moves to a different state, then the contact can be sampled x number of times while waiting for a valid state license, where x is the value in this field. For more information, see [Contact State License Fields](#).

## Related Topics

See the following topics for related information about samples management:

- [Authorizing Contacts to Receive Samples](#) (on page 586)
- Sample Transactions
- Managing Sample Transactions
- Sample Transaction Fields

## Authorizing Contacts to Receive Samples

Sales representatives cannot distribute samples to any contact. They can distribute samples only to contacts who are authorized to receive and sign for samples. Administrators control this ability by designating which contact types can be sampled. If a sales representative tries to distribute samples to a contact who is not authorized to receive and sign for samples, then an error message similar to the following is displayed: Contact cannot be sampled.

**Before you begin.** To authorize contacts to receive samples, you must first create a custom field named Can Be Sampled of type picklist and with the values Yes and No.

### *To authorize contacts to receive samples*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Application Customization section, click Application Customization.
- 3 In the Record Type Setup section, click the Contact link.

- 4 In the Cascading Picklists section, click the Contact Cascading Picklist link.
- 5 On the Contacts Cascading Picklists page, click Edit next to the following cascading picklist definition.

Parent Picklist	Related Picklist
Contact Type	Can Be Sampled

- 6 Go to Step 2 of the Cascading Picklists Wizard, and set the Related Picklist Displayed Value to No for each contact (or Parent Picklist Available Value) that you do not want authorized to receive and sign for samples.

**NOTE:** The Related Picklist Displayed Value for each contact (Parent Picklist Available Value) is set to Yes by default, which means that all contacts can be sampled by default.

For example, in the following table, the following contacts are authorized to receive and sign for samples: Hospital Executive, Lab Technician, Nurse Practitioner, Pharmacist, and Physician.

Parent Picklist Available Value	Related Picklist Displayed Value
Prospect	No
Customer	No
Partner	No
Hospital Executive	Yes
Lab Technician	Yes
Nurse Practitioner	Yes
Pharmacist	Yes
Physician	Yes
Physician Investigator	No
Research Nurse	No
Research Pharmacist	No
Research Lab Technician	No

For more information about cascading picklists, see [Defining Cascading Picklists](#) (on page 95).

## Related Topics

See the following topics for related information about samples management:

- [Setting the Maximum Number of Times Contacts Can be Sampled](#) (see "Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State License" on page 585)
- Sample Transactions
- Managing Sample Transactions

- Sample Transaction Fields

## Expression Builder

Click a topic to see information about Oracle On Demand Expression Builder (Expression Builder) and how to use it:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [About Expressions](#) (on page 591)
- [Data Types in Expression Builder](#) (on page 594)
- [Expression Builder Operators](#) (on page 597)
- [Expression Builder Functions](#) (on page 601)
- [Expression Builder Examples](#) (on page 649)

## About Expression Builder

Oracle On Demand Expression Builder (Expression Builder) is a tool for implementing business rules using expressions. An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Oracle CRM On Demand.

Expression Builder is used in the following areas in Oracle CRM On Demand:

- Advanced field management, in the following contexts:
  - Configuring field validation properties on a field
  - Specifying default field values

When defining field level validations and default field values, a company administrator can create flexible expressions to cover a variety of business rules. For more information on field validation and default values, see [About Field Management](#) (on page 65).

- Workflow rules, in the following contexts:
  - Configuring workflow rule conditions
  - Configuring Send Email actions
  - Configuring Update Values actions

From the Workflow pages, a company administrator can set up workflow rules that are evaluated when a record is updated, created, or deleted. Expressions are used to define both the conditions on the rules, and the actions that are executed by the rules. For more information about workflow rules, see [About Workflow Rules](#) (on page 277).

**NOTE:** Expression Builder can verify the syntax of an expression, but it cannot evaluate or verify an expression for mathematical, logical, or semantic accuracy.

## Related Topics

See the following topics for related Expression Builder information:

- [Using Expression Builder](#) (on page 589)
- [About Expressions](#) (on page 591)
- [Data Types in Expression Builder](#) (on page 594)
- [Expression Builder Operators](#) (on page 597)
- [Expression Builder Functions](#) (on page 601)
- [Expression Builder Examples](#) (on page 649)

## Using Expression Builder

In Oracle CRM On Demand, you can use Expression Builder wherever you see the *fx* icon beside a text box. Clicking the icon opens Expression Builder in a separate window.

### *To build an expression*

- 1 Click the *fx* icon to open Expression Builder.
- 2 In Expression Builder, select the fields and functions from the lists, or type in the expression editor.  
When you select a field from the list, the field is pasted in to the expression editor. For example, when you select *CloseDate* from the list of Opportunity fields, [*<CloseDate>*] is pasted into the expression editor.

**NOTE:** If your company administrator has renamed a field, the Fields picklist shows the new field name. However, the original field name (that is, the corresponding XML name) is pasted into the expression editor.

The brackets around the field name indicate that the value of the particular field will be evaluated and returned in its specific data type. See the following table for more information about selecting fields and field values.

- 3 Edit the expression by adding operators and literals as needed.

**NOTE:** If you want your expression to determine whether a picklist field has a certain value, do not type the value in the expression. For example, do not type [*<AccountType>*] = "Customer". Instead, select the picklist field from the list, and click the *Show Acceptable Values* link in Expression Builder. Select the value that you want to use in the expression from the values shown. The expression looks something like the following:

```
[<AccountType>]=LookupValue("ACCOUNT_TYPE", "Customer")
```

- 4 (Optional) Click *Check Syntax*, and then make any corrections.
- 5 Save your expression.

The following table describes Expression Builder.

Interface Element	Description
<i>record type</i> Fields	<p>Provides a context-specific picklist of the fields (from the context record type) that are allowed in an expression. If your company administrator has renamed some fields, the Fields picklist shows the new field names.</p> <p>Note the following points:</p> <ul style="list-style-type: none"> <li>■ If you are creating a workflow rule, or actions related to a workflow rule, the context record type is the record type specified in the definition of the workflow rule. For example, if you are creating the body of an email that is to be sent as an action on a workflow rule for a service request record, the context record type for Expression Builder is Service Request.</li> <li>■ In advanced field management, the context record type is the record type that is the parent of the field where the expression is being created. For example, when defining field validation on an opportunity field, the context record type for Expression Builder is Opportunity.</li> </ul>
Show Acceptable Values	<p>When you have selected a field from the Fields picklist, click Show Acceptable Values to display the acceptable values for that field.</p> <ul style="list-style-type: none"> <li>■ If the selected field is a picklist field, Show Acceptable Values displays all the options configured for that picklist.</li> </ul> <p>You can select only one option at a time. Selecting an option results in the definition of a Lookup function that can be used in an expression.</p> <ul style="list-style-type: none"> <li>■ If the selected field is not a picklist field, Show Acceptable Values displays a window that describes the acceptable values for a variety of data that the field can hold.</li> </ul>
Functions	<p>Provides a drop-down list of the special functions that are available to modify, extract, or process data within an expression. For a list of the available functions, see <a href="#">Expression Builder Functions</a> (on page 601).</p>
Expression	<p>A multiline editable text box that displays the expression.</p> <p>For information about the maximum supported length of an expression, see <a href="#">About Expressions</a> (on page 591).</p> <p>Fields and functions that you select from the picklists appear in the expression editor. You can also type expressions directly in the expression editor.</p> <p>The expression syntax always displays the language-independent field names. (A language-independent name is a name that does not change when the user language changes.) For custom fields, field names appear in the expression with integration tags affixed to the language-independent names.</p>
Syntax Guide	<p>Displays the Expression Builder topic in Oracle CRM On Demand</p>

Interface Element	Description
	online help.
Sample Expressions	Displays the following topic, Expression Builder Examples, in Oracle CRM On Demand online help.
Check Syntax	Validates the syntax of the expression that you created.
Save	Saves the expression.
Cancel	Closes the Expression Builder window without saving any changes.

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [About Expressions](#) (on page 591)
- [Data Types in Expression Builder](#) (on page 594)
- [Expression Builder Operators](#) (on page 597)
- [Expression Builder Functions](#) (on page 601)
- [Expression Builder Examples](#) (on page 649)

## About Expressions

An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Oracle CRM On Demand. This topic provides information about the following features of expressions:

- Expression length
- Literal length
- Conditional expressions
- Validation expressions
- Using dependent fields in expressions

### Expression Length

For the message body of an email configured through the Send Email action on a workflow rule, the maximum supported length of an expression is 2000 characters, including spaces. You can insert a line break in the email message by pressing Enter. A line break is counted as two characters in the text box.

In all other cases where Expression Builder is used, the maximum supported length of an expression is 1024 characters, including spaces.

You must also ensure that the total number of characters in the field where you are saving the expression does not exceed the limit for that field. In the following workflow fields, three percent signs (%%%) are placed before and after functions and field names:

- The Subject and Message Body fields in an email configured through the Send Email action
- The Subject and Description fields in a task configured through the Create Task action

The percent signs indicate that the function or field name is to be converted to a text value. Each percent sign is counted as one character in the field where the expression is saved.

If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added.

For example, if you use Expression Builder to insert the following field name into the message body of an email on a workflow action:

```
[<AccountName>]
```

Expression Builder inserts the following (a total of 21 characters) into the message body of the email on the workflow action:

```
%%[%<AccountName>]%%%
```

## Literal Length

When you pass a string or numeric literal to a function in Expression Builder, the literal must not contain more than 75 characters, including spaces. If a literal exceeds 75 characters, then Expression Builder considers the literal to be a syntax error. When you pass a string to a function by referencing a field name, the limit of 75 characters does not apply to the length of the value in the field passed to the literal.

When you create an expression to set a default value for a field, the limit of 75 characters applies to any string or numeric literals passed to any function in the expression. In addition, the number of characters in the result of the expression must not exceed the maximum number of characters allowed in the field.

## Conditional Expressions

A conditional expression is an expression that, when evaluated by the application, always returns a Boolean value such as True or False.

**NOTE:** Yes, No, Y, and N are not Boolean values. If you specify True or False as return values for functions such as the [Iif](#) (on page 610) function, then True and False are returned as strings and not as Boolean values. Using incorrect Boolean values in conditional expressions can result in unpredictable behavior.

An expression used in any of the following contexts must be a conditional expression:

- To specify a field validation rule
- To specify a condition in a workflow rule
- As the first parameter in an [Iif](#) (on page 610) function

## Validation Expressions

Validation expressions are used to ensure that the data entered in fields is valid. A validation expression must be a conditional expression.



A validation expression for a field is evaluated when the record is created, and each time the field is updated by a user, except in the following circumstances:

- A field is left blank when the record is created. Field validation does not force a value to be required.
- A field has a pre-existing invalid value, and it is not changed when it is updated.

If a validation expression is not evaluated, or if a validation expression evaluates to NULL, no error message is generated. An error message is generated only when the validation expression fails (that is, the expression evaluates to FALSE).

A validation expression is different from other types of expressions in that it can start with a conditional operator. For example, if Account Name is the field being validated by the expression, the expression can start with:

```
= 'Acme Hospital'
```

This expression, though not well formed, will pass a syntax check, because Oracle CRM On Demand inserts the name of the field being validated before the expression if it does not find a field name at the start of the expression. You can also enter the validation expression as follows:

```
[<AccountName>]= 'Acme Hospital'
```

where [<AccountName>] is the field being validated.

If the expression requires other fields to be evaluated in addition to the field being validated, it is standard practice for the first comparison in the expression to be performed on the field being validated.

Validation expressions are used only in the Field Validation text box in advanced field management in Oracle CRM On Demand.

## Validation Expression Examples

Example 1: A business process requires that the close date of an opportunity must be later than the created date of the opportunity.

To implement this process, create a validation expression for the Close Date field (in the Field Setup page for opportunities) as follows:

```
> [<CreatedDate>]
```

Alternatively, you can use the following example, but note that the field that is being evaluated (Close Date) must be the first field in the expression:

```
[<CloseDate>] > [<CreatedDate>]
```

For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 75).

Example 2: A business process requires that the revenue of an opportunity must be a nonzero value when the probability of the opportunity is 40% or greater.

The business rule indicates that the dependency is on both fields and can be restated as follows:

For an opportunity, revenue cannot be zero when the probability is greater than or equal to 40. Conversely, the probability cannot be greater than or equal to 40 if the revenue is zero.

A validation expression for a field is evaluated when the record is created, and each time the field is updated by a user. Because an update to either the Probability field or the Revenue field can affect both fields, you must have validation rules on both the Probability field and the Revenue field to implement the business rule correctly. (For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 75).)

The steps required to implement this example are as follows:

- 1 Configure the following validation rule for the Probability field:

`< 40 OR ([<Probability>]>= 40 AND [<Revenue>]> 0)`

Note that you do not use the percentage sign (%).

- 2 Add a validation error message such as the following to the Probability field:

Revenue must be greater than 0 when the probability is greater than or equal to 40%.

- 3 Configure the following validation rule for the Revenue field:

`(> 0 AND [<Probability>]>= 40) OR [<Probability>]< 40`

- 4 Add a validation error message such as the following to the Revenue field:

Revenue must be greater than 0 when the probability is greater than or equal to 40%.

## Using Dependent Fields in Expressions

A *dependent field* is a joined field whose values depend on a foreign key. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. An example of a dependent field is the AccountName field on the Opportunity record type. The AccountName field on the Opportunity record type is a joined field whose values depend on the AccountId foreign key field, which references the Account record type.

If your expression has to determine the value of a dependent field, then it is recommended that you use the JoinFieldValue function and get the most recent value of the field by referring to the ID field; that is, the foreign key field. Otherwise, the results of your expression might be incorrect, and the outcome of the expression value might be invalid. For more information about joined fields and the JoinFieldValue function, see [JoinFieldValue](#) (on page 613).

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Data Types in Expression Builder

This topic describes the data types in Oracle CRM On Demand, and how they are used in Expression Builder.

### Data Types in Oracle CRM On Demand

The following table shows the data type returned when an Oracle CRM On Demand field is used in an expression. To get the value of a field, use the syntax [`<FieldName>`].

Oracle CRM On Demand Field Type	Return Type in Expressions
Integer	Integer
Picklist	String
Currency	Currency
ID	String
Text	String
Check box	Boolean. For example, you can use [<Active>] directly in places where conditions are expected. You can also use FieldValue('<Active>') = 'Y'.
Date	Date
Date Time	Date Time
Number	Number

**NOTE:** If the company administrator has renamed fields, the *record type* Fields list shows the new names, but the expression syntax shows the original names. For custom fields, the Integration Tag names that the company administrators can change are used in the expression syntax. The syntax is as follows:

[<CustomTag\_ITAG>] and FieldValue('<CustomTag\_ITAG>')

## Data Type Arithmetic

When a statement references more than one field value, and the fields have different data types, the order of the data types can affect the calculation. When an operator (other than the exponent operator) is applied to two operands of two different data types, the operand on the right side of the operator is converted to the data type of the operand on the left side before the operation is evaluated. For example, if CloseDate is 02/09/2007, the following expression:

```
PRE('<CloseDate>') + 30
```

evaluates to 02/09/200730. Therefore, the following condition:

```
[<CloseDate>] > PRE('<CloseDate>') + 30
```

is syntactically valid, but its meaning is invalid. The condition is correctly written as follows:

```
[<CloseDate>] - 30 > PRE('<CloseDate>').
```

**NOTE:** When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

The following tables show the possible results of the various arithmetic operations, using the example values.

Field	Data Type	Example Value
Quantity	Integer	5
Item Price	Currency	2.25

Calculation	Result	
	Value	Data Type
[<Item Price>] + [<Quantity>]	7.25	Currency
[<Quantity>] + [<Item Price>]	7	Integer
[<Item Price>] - [<Quantity>]	(2.75) <b>NOTE:</b> For currency fields, parentheses indicate that the value is negative.	Currency
[<Quantity>] - [<Item Price>]	3	Integer
[<Item Price>] * [<Quantity>]	11.25	Currency
[<Quantity>] * [<Item Price>]	10	Integer
[<Item Price>] / [<Quantity>]	0.45	Currency
[<Quantity>] / [<Item Price>]	2.50	Currency

When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

In this example (where Quantity is an integer field, value 5, and Item Price is a currency field, value 2.25), if the operand on the right side of the operator was converted to the data type of the operand on the left side, the expected value of Quantity ^ Item Price would be 25, and the expected data type would be integer. However, the results are shown in the following table.

Calculation	Result	
	Value	Data Type
[<Item Price>] ^ [<Quantity>]	57.67	Currency
[<Quantity>] ^ [<Item Price>]	37.38	Currency

The negation operator (minus sign [-]) is also supported in Expression Builder. For example:

Calculation	Result	
	Value	Data Type
-1 * [<ItemPrice>]	(2.25)	Currency

If you convert a number to a string, the calculation does not work correctly. For example:

Calculation	Result		Description
	Value	Data Type	
1234 + abcd	1234	Number	The string "abcd" evaluates to the number 0 and is then added to 1234.
abcd + 1234	abcd1234	String	The number 1234 evaluates to the string "1234" and is appended to the string "abcd".

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Expression Builder Operators

This topic describes the operators that you can use in Expression Builder, and the order in which they are evaluated.

### Arithmetic Operators

The following table describes the purpose of each arithmetic operator and gives an example of how it is used.

Operator	Purpose	Example
+	Add	[<Record Number>] + 1
-	Subtract	[<Record Number>] - 1
-	Negate	[<Revenue>] < -100
*	Multiply	[<Subtotal>] * 0.0625
/	Divide	[<Total Items>] / [<Total

Operator	Purpose	Example
		Orders>]
^	Exponent	[<Grid Height>] ^ 2

## Logical Operators

The following truth table shows the possible results from the logical operators in Expression Builder.

Logical Operator	First Operand	Second Operand	Result
NOT	TRUE		FALSE
	FALSE		TRUE
	NULL		NULL
AND	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	FALSE
	FALSE	TRUE	FALSE
	TRUE	NULL	NULL
	FALSE	NULL	FALSE
	NULL	TRUE	NULL
	NULL	FALSE	FALSE
	NULL	NULL	NULL
OR	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	TRUE
	FALSE	TRUE	TRUE
	TRUE	NULL	TRUE
	FALSE	NULL	NULL
	NULL	TRUE	TRUE

Logical Operator	First Operand	Second Operand	Result
	NULL	FALSE	NULL
	NULL	NULL	NULL

## Comparison Operators

The following table describes the purpose of each comparison operator and gives an example of how it is used.

Operator	Purpose	Example
=	Tests that the first operand is equal to the second operand.	[<Last Name>] = "Smith"
< >	Tests that the first operand is not equal to the second operand.	[<Role>] <> "End-User"
>	Tests that the first operand is greater than the second operand.	[<Revenue>] > 5000
<	Tests that the first operand is less than the second operand.	[<Probability>] < .7
> =	Tests that first operand is greater than or equal to the second operand.	[<Revenue>] >= 5000
< =	Tests that the first operand is less than or equal to the second operand.	[<Probability>] <= .7
LIKE	Tests that the value of the first operand matches the specified string.	[<Last Name>] LIKE "Smith"  <b>TIP:</b> You can use the asterisk (*) and question mark (?) pattern matching special characters with the LIKE operator.
NOT LIKE	Tests that the value of the first operand does not match the specified string.	[<Last Name>] NOT LIKE "Smith" or NOT ([<Last Name>] LIKE "Smith")  <b>NOTE:</b> The parentheses are required in the second

Operator	Purpose	Example
		example.  <b>TIP:</b> You can use the asterisk (*) and question mark (?) pattern matching special characters with the NOT LIKE operator.
IS NULL	Tests that the operand is null.	[<Last Name>] IS NULL
IS NOT NULL	Tests that the operand is not null.	[<Last Name>] IS NOT NULL

## Pattern Matching Special Characters

The following table describes the pattern matching special characters. These special characters can be used with the LIKE and NOT LIKE comparison operators.

Character	Purpose	Example
*	Zero or more characters	[<Last Name>] LIKE "Sm*" returns all records where the [<Last Name>] value starts with the characters <i>Sm</i> , as in <i>Smith</i> , <i>Smythe</i> , <i>Smart</i> , and so on.  [<Last Name>] LIKE "*om*" returns all records where the [<Last Name>] field contains the characters <i>om</i> , as in <i>Thomas</i> , <i>Thompson</i> , <i>Tomlin</i> , and so on.
?	One character	[<First Name>] NOT LIKE "Da?" returns all records where the [<First Name>] value is three characters long and does not start with the letters <i>Da</i> . Records with <i>Ted</i> , <i>Tom</i> , and <i>Sam</i> are returned, but <i>Dax</i> and <i>Dan</i> are not.  NOT ([<First Name>] LIKE "?o?") returns all records where the [<First Name>] value is three characters long and does not have as its middle character <i>o</i> . Records with <i>Ted</i> and <i>Sam</i> are returned, but <i>Tom</i> and <i>Bob</i> are not.

## Concatenation Operator

The + (plus) operator is used in emails to concatenate field values and text.

## Precedence of Operators

Precedence is the order in which Oracle CRM On Demand evaluates the various operators within a single expression. The following rules apply:

- Operators with higher precedence are evaluated before operators with lower precedence.
- Operators with equal precedence are evaluated from left to right.



- Lower-level numbers indicate higher precedence.
- The use of parentheses affects the order of precedence within an expression. The expression within parentheses is evaluated before the expression outside the parentheses.

The levels of precedence are listed in the following table.

Level	Operator
1	( )
2	- (negation)
3	^ (exponentiation)
4	* (multiplication), / (division)
5	+ (addition), - (subtraction), NOT logical operator
6	AND logical operator
7	OR logical operator
8	=, <>, >, <, >=, <= comparison operators

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Expression Builder Functions

The following table lists the functions that you can use in Expression Builder. Click the name of a function to see more information about the function.

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
<a href="#">IfNull</a> (on page 610)	<a href="#">Duration</a> (on page 603)	<a href="#">FieldValue</a> (on page 606)	<a href="#">Locale</a> (on page 631)	<a href="#">ExcludeChannel</a> (on page 605)	<a href="#">LN</a> (on page 630)
<a href="#">IIf</a> (on page 610)	<a href="#">JulianDay</a> (on page 624)	<a href="#">FindNoneOf</a> (on page 607)	<a href="#">LocaleListSeparator</a> (on page 631)	<a href="#">GetGroupId</a> (on page 608)	
	<a href="#">JulianMonth</a> (on page 624)	<a href="#">FindOneOf</a> (on page 607)	<a href="#">OrganizationName</a>	<a href="#">GetParentId</a> (on page 608)	

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
	625)	608)	(on page 635)	page 609)	
	<a href="#">JulianQtr</a> (on page 626)	<a href="#">InStr</a> (on page 612)	<a href="#">UserValue</a> (on page 644)	<a href="#">JoinFieldValue</a> (on page 613)	
	<a href="#">JulianWeek</a> (on page 626)	<a href="#">Left</a> (on page 628)		<a href="#">LookupName</a> (on page 632)	
	<a href="#">JulianYear</a> (on page 627)	<a href="#">Len</a> (on page 629)		<a href="#">LookupValue</a> (on page 633)	
	<a href="#">Timestamp</a> (on page 640)	<a href="#">Mid</a> (on page 634)		<a href="#">PRE</a> (on page 635)	
	<a href="#">Today</a> (on page 643)	<a href="#">Right</a> (on page 637)		<a href="#">RowIdToRowNum</a> (on page 638)	
	<a href="#">UtcConvert</a> (on page 647)	<a href="#">ToChar</a> (on page 640)		<a href="#">RowNum</a> (on page 639)	

Note the following information regarding other functions:

- Some of the functions listed in the drop-down list on the Functions field in Expression Builder are for internal use only. Do not use the following functions in your expressions:
  - [GetParentId](#)
  - [IsManagerPosition](#)
  - [Lookup](#)
  - [LookupMessage](#)
  - [LOVLanguage](#)
  - [PositionId](#)
  - [PositionName](#)
- It is recommended that you use the [UserValue](#) (on page 644) function instead of the functions listed in the following table. These functions will become obsolete.

Function	Recommended Alternative
Alias	<a href="#">UserValue</a> ('<Alias>')
Currency	<a href="#">UserValue</a> ('<CurrencyCode>')
DivisionName	<a href="#">UserValue</a> ('<Division>')

Function	Recommended Alternative
FirstName	UserValue('<FirstName>')
JobTitle	UserValue('<JobTitle>')
Language	UserValue('<LanguageCode>')
LanguageName	UserValue('<Language>')
LastName	UserValue('<LastName>')
LocalCurrency	UserValue('<CurrencyCode>')
LocaleName	UserValue('<Locale>')
LoginId	UserValue('<UserId>')
LoginName	UserValue('<UserSignInId>')

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)

## Duration

The Duration function in Expression Builder returns a number that indicates a period in days or fractions of days as indicated by the period argument.

### Syntax

Duration(period)

### Result Type

Number

### Arguments

The following table describes the arguments for the function.

Argument	Description
Period	A string literal in the following format <i>PnYnMnDTnHnM</i> :

Argument	Description
	<p>where:</p> <ul style="list-style-type: none"> <li>■ P is the period indicator</li> <li>■ <i>nY</i> specifies the number of years between 0 and 5</li> <li>■ <i>nM</i> specifies the number of months between 0 and 12</li> <li>■ <i>nD</i> specifies the number of days between 0 and 200</li> <li>■ T separates the date and time specifications</li> <li>■ <i>nH</i> specifies the number of hours between 0 and 200</li> <li>■ <i>nM</i> specifies the number of minutes between 0 and 59</li> </ul>

Note the following points:

- Do not specify a plus sign (+) for positive values.
- You can specify a negative duration as -Duration(Period).
- Specifying seconds is not supported.
- The maximum supported duration is 'P5Y12M200DT200H59M' (that is, 5 years, 12 months, 200 days, 200 hours, and 59 minutes).
- If the number of years, months, days, hours, or minutes is zero, you can omit the number and its corresponding designator.
- If the number of years, months, or days is zero and the time component is a nonzero value, at least one of the year, month, or day components (a number and its designator) must be present.
- If none of the time components are present in the period, the T designator must not be included in the period.
- The designator *P* must always be present in the period.

## Examples

The following are valid examples of the Duration function:

```
Duration('P0Y1M1DT2H5M')
```

```
Duration('P0Y0DT1H')
```

```
Duration('P1D')
```

```
Duration('P0Y0M0DT0H0M')
```

```
Duration('P0DT1M')
```

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)

- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## ExcludeChannel

The ExcludeChannel function in Expression Builder returns FALSE if the specified channel name is the channel that the request came from.

### Syntax

ExcludeChannel(channel name)

### Result Type

Boolean

### Arguments

The following table describes the arguments for the function.

Argument	Description
channel name	The name of the channel to be excluded.

The following table describes the valid strings for use in the channel name argument.

Channel Name String	Description
Import	This channel string excludes updates performed through the import functionality and through Oracle Data Loader On Demand.
Online	This channel string excludes updates performed by user interactions through browser windows.
Mass Update	This channel string excludes updates performed through the Mass Update option on list pages.
Record Merge	This channel string excludes updates performed by record merges.
Offline	This channel string excludes updates from Oracle Offline On Demand.
Web Services	This channel string excludes updates from Web services.
Office	This channel string excludes updates from Oracle CRM On Demand Integration for Office.

Channel Name String	Description
OEI	This channel string excludes updates from Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand.

### Examples

The following example stops a process from being triggered by a Web service request:

```
ExcludeChannel("web Services")
```

The following example stops a process from being triggered by an import operation or Oracle Data Loader On Demand:

```
ExcludeChannel("Import")
```

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## FieldValue

The FieldValue function in Expression Builder returns the value of a field as a string.

### Syntax

```
FieldValue('<field_name>')
```

### Result Type

String

### Arguments

The following table describes the arguments for the function.

Argument	Description
field_name	The valid XML name or customized integration tag corresponding to the chosen field.

## Examples

The following example:

```
Fieldvalue('<CreateDate>')
```

returns the value of the Created Date field as a string.

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## FindNoneOf

The FindNoneOf function in Expression Builder returns the position of the first instance in the first argument (string1) that does not match any character in the second argument (string2).

## Syntax

```
FindNoneOf(string1, string2)
```

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

## Examples

The following example returns the value 4:

```
FindNoneOf ("abcdef", "abc")
```

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## FindOneOf

The FindOneOf function in Expression Builder returns the position of the first instance in the first argument (string1) of a character in the second argument (string2).

### Syntax

FindOneOf(string1, string2)

### Result Type

Integer

### Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

### Examples

The following example returns the value 3:

```
FindOneOf ("abcdef", "xyzc")
```

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## GetGroupId

The GetGroupId function in Expression Builder returns the Oracle CRM On Demand calendar-sharing group.



## Syntax

GetGroupId()

## Result Type

String

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## GetParentId

The GetParentId function in Expression Builder returns the Row Id of a parent record.

## Syntax

GetParentId()

## Result Type

String

## Example

If a contact is associated with an account with Row Id 12-1A876B, the GetParentId function returns the following value:

12-1A876B

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## IfNull

The IfNull function in Expression Builder returns the value from the first argument that is passed to the function. If the first argument returns NULL, the value from the second argument is returned.

### Syntax

IfNull(expr1, expr2)

### Result Type

The result type of the IfNull function is the type of its first argument, even if the first argument is NULL. The second argument is converted to the type of the first argument before its value is returned.

### Arguments

The following table describes the arguments for the function.

Argument	Description
expr1	A field name or expression.
expr2	The field name or expression that is returned if expr1 is NULL.

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## IIf

The IIf function in Expression Builder returns one of two parameters based on the evaluation of a conditional expression. IIf is an abbreviation for Immediate If.

### Syntax

IIf(expr, result\_if\_true, result\_if\_false)

### Alternate Syntax

IIf(expr, expr\_if\_true, expr\_if\_false)

## Mixed Syntax

IIf(expr, result\_if\_true, expr\_if\_false)

IIf(expr, expr\_if\_true, result\_if\_false)

## Result Type

The result type of the IIf() function is always the type of its first argument. If the expression evaluates to FALSE, the second argument is converted to the type of the first argument before its value is returned.

## Arguments

The following table describes the arguments for the function.

Argument	Description
expr	The conditional expression that is to be evaluated.
result_if_true	The return value if the conditional expression evaluates to true.
result_if_false	The return value if the conditional expression evaluates to false.
expr_if_true	An expression to be evaluated if the conditional expression evaluates to true.
expr_if_false	An expression to be evaluated if the conditional expression evaluates to false.

## Examples

The following is an example of mixed syntax in the IIf function:

A business process requires that the Region field on an account detail page is to be updated when the Billing State field is changed as follows:

If the Billing State field is changed to OK or TX, the region field is to be updated to Central. If the Billing State field is changed to CA, the Region field is to be updated to West. For all other states, the Region field is to be updated to East.

```
IIf([<PrimaryBillToState>]='OK' OR [<PrimaryBillToState>]='TX', 'Central',
IIf([<PrimaryBillToState>]='CA', 'West', 'East'))
```

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## InStr

The InStr function in Expression Builder returns the position of the first occurrence of one string within another.

### Syntax

Instr(string1, string2, start, end)

### Result Type

Integer

### Arguments

The following table describes the arguments for the function.

Argument	Description
string1	Specifies the string that is to be searched. The value can be a string literal, or a field name, or an expression that returns a string.
string2	Specifies the string that is to be searched for. The value can be a string literal, or a field name, or an expression that returns a string. <b>NOTE:</b> The search for a string is case-sensitive.
start	(Optional) An integer that specifies the start point in string1.
end	(Optional) An integer that specifies the end point in string1.

### Examples

The following example returns the value 9:

```
InStr('john.doe@company.com', '@')
```

The following example shows how the InStr function can be used in a workflow rule condition. In the workflow rule condition, the InStr function is used to determine if a specified string appears in a field on the record. If the string is found in the field, then the actions specified on the workflow rule are performed. In this example, the InStr function determines if the Subject field in a record contains the word *REVIEW*. The action on the workflow rule is performed only if the Subject field contains the word *REVIEW* in uppercase letters.

```
InStr([<Subject>], 'REVIEW') > 0
```

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## JoinFieldValue

A record type can be referenced by another record type through a foreign key. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. For example, on most record types, the OwnerId field is a foreign key that references the User record type. The Owner field on many records is a joined field that uses the OwnerId foreign key to reference the Alias field on the User record type.

The JoinFieldValue function in Expression Builder returns the value of a joined field when the referenced record type and the related foreign key fields are specified in the function. The JoinFieldValue function can also retrieve other fields on the referenced record type that are not directly joined to the referencing object, which allows you to look up fields across record types from related record types.

## Syntax

JoinFieldValue (ref\_record\_type, foreign\_key, field\_name)

## Result Type

String.

If an error occurs or the requested field value is empty, a zero-length string is returned.

## Arguments

The following table describes the arguments for the function.

Argument	Description
ref_record_type	<p>The language-independent name of the referenced record type. (A <i>language-independent name</i> is a name that does not change when the user language changes.)</p> <p>The argument must be enclosed in field string identifiers. For example:</p> <p style="text-align: center;">' &lt;Account&gt; '</p> <p>See the table in the Record Types section of this topic for a list of the language-independent record-type names.</p>

Argument	Description
foreign_key	A literal or expression that returns a valid row ID in the referenced record type (specified in the ref_record_type argument). If the row ID is invalid, the function returns a zero-length string. Direct field references must be enclosed in field identifiers. For example:  [<AccountId>]
field_name	The language-independent name of a field in the referenced record type (specified by the ref_record_type argument). If the field does not exist in the referenced record type, an error is returned. The field name must be enclosed in field string identifiers. For example:  '<Type>'

## Examples

Example 1: A business process requires a workflow rule to look up the name of the new owner when the owner of a record is changed. When the owner of a record is changed, only the OwnerId foreign key field on the record is updated. As a result, the following condition on a workflow rule does not look up the new owner of the record:

```
PRE('<Owner>') <> [<Owner>]
```

Instead, you can use the following condition in the workflow to look up the new owner of the record:

```
PRE('<Owner>') <> JoinFieldValue('<User>', [<OwnerId>], '<Alias>')
```

Example 2: To get the email address of the previous owner of a record, use the following expression:

```
JoinFieldValue('<User>', PRE('<OwnerId>'), '<EmailAddr>')
```

Example 3: To get the email address of the current owner of a record, use the following expression:

```
JoinFieldValue('<User>', [<OwnerId>], '<EmailAddr>')
```

Example 4: A business process requires that a service request email is sent to a contact. Before the email is sent, the workflow rule checks that the contact has agreed to receive emails. The workflow rule (based on the service request record type) has the following condition:

```
JoinFieldValue('<Contact>', [<ContactId>], '<NeverEmail>') <> 'Y'
```

Example 5: To get the territory of the primary account for a service request, use the following expression:

```
JoinFieldValue('<Territory>', JoinFieldValue('<Account>', [<AccountId>], '<TerritoryId>'), '<TerritoryName>')
```

## Record Types

In the following table, the Referenced Record Type column shows the language-independent names of the referenced record types that you can look up using the JoinFieldValue function. The Foreign Key column shows

the foreign keys that you use to look up the referenced record type. The Record Type column shows the record types that you use to configure workflow rules where the foreign keys are exposed.

Record Type	Foreign Key	Referenced Record Type
Account	ParentAccountId	Account
Account	BookId	Book
Account	SourceCampaignId	Campaign
Account	PrimaryContactId	Contact
Account	CustomObject1Id	CustomObject1
Account	CustomObject2Id	CustomObject2
Account	CustomObject3Id	CustomObject3
Account	TerritoryId	Territory
Account	OwnerId	User
Account Competitor	CompetitorId	Account
Account Competitor	PrimaryContactId	Contact
Account Contact	AccountId	Account
Account Contact	ContactId	Contact
Account Contact Role	ContactId	Contact
Account Note	AccountId	Account
Account Team	AccountId	Account
Account Team	UserId	User
Accreditation	BookId	Book
Activity	AccountId	Account
Activity	BookId	Book
Activity	CampaignId	Campaign
Activity	PrimaryContactId	Contact
Activity	CustomObject1Id	CustomObject1
Activity	CustomObject2Id	CustomObject2
Activity	CustomObject3Id	CustomObject3
Activity	DealerId	Dealer
Activity	FundRequestId	FundRequest

Record Type	Foreign Key	Referenced Record Type
Activity	LeadId	Lead
Activity	MedEdEventId	MedEdEvent
Activity	OpportunityId	Opportunity
Activity	PortfolioId	Portfolio
Activity	ServiceRequestId	ServiceRequest
Activity	DelegatedById	User
Activity	OwnerId	User
Application	BookId	Book
Assessment	ContactId	Contact
Assessment	LeadId	Lead
Assessment	OpportunityId	Opportunity
Assessment	ServiceRequestId	ServiceRequest
Asset	ManufacturerId	Account
Asset	AccountId	Account
Asset	CustomerContactId	Contact
Asset	ProductId	Product
Auto Dealer Makes	AccountId	Account
Auto Sales Hours	AccountId	Account
Auto Service Hours	ProductId	Product
Business Plan	BookId	Book
Call Product Detail	ProductId	Product
Call Sample Dropped	OwnerId	User
Campaign	BookId	Book
Campaign	CampaignId	Campaign
Campaign	CustomObject1Id	CustomObject1
Campaign	CustomObject2Id	CustomObject2
Campaign	CustomObject3Id	CustomObject3
Campaign	OwnerId	User
Campaign Recipients	ContactId	Contact



Record Type	Foreign Key	Referenced Record Type
Campaign Recipients	CampaignContactId	Contact
Campaign Recipients	CampaignId	Campaign
Certification	BookId	Book
Contact	AccountId	Account
Contact	BookId	Book
Contact	SourceCampaignId	Campaign
Contact	ManagerId	Contact
Contact	ContactId	Contact
Contact	CustomObject1Id	CustomObject1
Contact	CustomObject2Id	CustomObject2
Contact	CustomObject3Id	CustomObject3
Contact	TerritoryId	Territory
Contact	OwnerId	User
Contact Note	ContactId	Contact
Contact Team	ContactId	Contact
Contact Team	UserId	User
Course	BookId	Book
Custom Object 01	AccountId	Account
Custom Object 01	ActivityId	Activity
Custom Object 01	BookId	Book
Custom Object 01	CampaignId	Campaign
Custom Object 01	ContactId	Contact
Custom Object 01	ParentId	CustomObject1
Custom Object 01	CustomObject2Id	CustomObject2
Custom Object 01	CustomObject3Id	CustomObject3
Custom Object 01	DealerId	Dealer
Custom Object 01	FundId	Fund
Custom Object 01	HouseholdId	Household
Custom Object 01	LeadId	Lead

Record Type	Foreign Key	Referenced Record Type
Custom Object 01	MedEdEventId	MedEdEvent
Custom Object 01	OpportunityId	Opportunity
Custom Object 01	PortfolioId	Portfolio
Custom Object 01	ProductId	Product
Custom Object 01	ServiceRequestId	ServiceRequest
Custom Object 01	SolutionId	Solution
Custom Object 01	OwnerId	User
Custom Object 01	VehicleId	Vehicle
Custom Object 02	AccountId	Account
Custom Object 02	ActivityId	Activity
Custom Object 02	BookId	Book
Custom Object 02	CampaignId	Campaign
Custom Object 02	ContactId	Contact
Custom Object 02	CustomObject1Id	CustomObject1
Custom Object 02	ParentId	CustomObject2
Custom Object 02	CustomObject3Id	CustomObject3
Custom Object 02	DealerId	Dealer
Custom Object 02	FundId	Fund
Custom Object 02	HouseholdId	Household
Custom Object 02	LeadId	Lead
Custom Object 02	MedEdEventId	MedEdEvent
Custom Object 02	OpportunityId	Opportunity
Custom Object 02	PortfolioId	Portfolio
Custom Object 02	ProductId	Product
Custom Object 02	ServiceRequestId	ServiceRequest
Custom Object 02	SolutionId	Solution
Custom Object 02	OwnerId	User
Custom Object 02	VehicleId	Vehicle
Custom Object 03	AccountId	Account

Record Type	Foreign Key	Referenced Record Type
Custom Object 03	ActivityId	Activity
Custom Object 03	BookId	Book
Custom Object 03	CampaignId	Campaign
Custom Object 03	ContactId	Contact
Custom Object 03	CustomObject1Id	CustomObject1
Custom Object 03	CustomObject2Id	CustomObject2
Custom Object 03	ParentId	CustomObject3
Custom Object 03	DealerId	Dealer
Custom Object 03	FundId	Fund
Custom Object 03	HouseholdId	Household
Custom Object 03	LeadId	Lead
Custom Object 03	MedEdEventId	MedEvent
Custom Object 03	OpportunityId	Opportunity
Custom Object 03	PortfolioId	Portfolio
Custom Object 03	ProductId	Product
Custom Object 03	ServiceRequestId	ServiceRequest
Custom Object 03	SolutionId	Solution
Custom Object 03	OwnerId	User
Custom Object 03	VehicleId	Vehicle
Custom Objects 04 - 40	BookId	Book
Deal Registration	BookId	Book
Dealer	BookId	Book
Dealer	CustomObject1Id	CustomObject1
Dealer	CustomObject2Id	CustomObject2
Dealer	CustomObject3Id	CustomObject3
Dealer	ParentDealerId	Dealer
Dealer	PrimaryTerritoryId	Territory
Dealer	OwnerId	User
Dealer Territory	ChannelPartnerId	Dealer

Record Type	Foreign Key	Referenced Record Type
Exam	BookId	Book
Financial Account	BookId	Book
Financial Plan	BookId	Book
Fund	BookId	Book
Fund	CustomObject1Id	CustomObject1
Fund	CustomObject2Id	CustomObject2
Fund	CustomObject3Id	CustomObject3
Fund	FundId	Fund
Fund	PrimaryOwnerId	User
Fund Participant	FundId2	Fund
Fund Request	CampaignId	Campaign
Fund Request	PrimaryContactId	Contact
Fund Request	FundId	Fund
Fund Request	OwnedByEmployeeId	FundRequest
Fund Request	FundOwnerId	User
Fund Request	OwnerId	User
Household	AccountID	Account
Household	BookId	Book
Household	PrimaryContactId	Contact
Household	CustomObject1Id	CustomObject1
Household	CustomObject2Id	CustomObject2
Household	CustomObject3Id	CustomObject3
Household	OwnerGroupId	Household
Household Contact	CampaignId	Campaign
Lead	AccountId	Account
Lead	BookId	Book
Lead	CampaignId	Campaign
Lead	ContactId	Contact

Record Type	Foreign Key	Referenced Record Type
Lead	CustomObject1Id	CustomObject1
Lead	CustomObject2Id	CustomObject2
Lead	CustomObject3Id	CustomObject3
Lead	OpportunityId	Opportunity
Lead	OwnerId	User
Lead	SalesRepId	User
Lead	ReferredById	User
MDF Requests	BookId	Book
MedEd Event	BookId	Book
MedEd Event	ProductId	Product
MedEd Event	OwnerId	User
Objective	BookId	Book
Opportunity	AccountId	Account
Opportunity	BookId	Book
Opportunity	SourceCampaignId	Campaign
Opportunity	KeyContactId	Contact
Opportunity	ConatactId	Contact
Opportunity	CustomObject1Id	CustomObject1
Opportunity	CustomObject2Id	CustomObject2
Opportunity	CustomObject3Id	CustomObject3
Opportunity	DealerId	Dealer
Opportunity	TerritoryId	Territory
Opportunity	OwnerId	User
Opportunity Competitor	PrimaryContactId	Contact
Opportunity Competitor	CompetitorId	Opportunity
Opportunity Contact Role	ContactId	Contact
Opportunity Contact Role	OpportunityId	Opportunity
Opportunity Note	OpptyId	OpportunityId

Record Type	Foreign Key	Referenced Record Type
Opportunity Partner	PrimaryContactId	Contact
Opportunity Partner	PartnerId	Opportunity
Opportunity Partner	OwnerId	User
Opportunity Team	OptyId	Opportunity
Opportunity Team	UserId	User
Partner	ParentAccountId	Account
Partner	BookId	Book
Partner	SourceCampaignId	Campaign
Partner	TerritoryId	Territory
Partner	ChannelAccountManagerId	User
Partner	OwnerId	User
Partner Program	BookId	Book
Policy	BookId	Book
Portfolio	AccountId	Account
Portfolio	InstitutionId	Account
Portfolio	BookId	Book
Portfolio	PrimaryContactId	Contact
Portfolio	CustomObject1Id	CustomObject1
Portfolio	CustomObject2Id	CustomObject2
Portfolio	CustomObject3Id	CustomObject3
Portfolio	OwnerGroupId	Portfolio
Portfolio	ParentPortfolioAccountId	Portfolio
Portfolio	ParentProductId	Product
Portfolio	ProductId	Product
Portfolio	OwnerId	User
Portfolio Owner	ContactId	Contact
Portfolio Owner	PortfolioId	Portfolio
Product	ParentProductId	Product

Record Type	Foreign Key	Referenced Record Type
Revenue	OpportunityAccountId	Account
Revenue	AssetId	Asset
Revenue	ContactId	Contact
Revenue	OpportunityId	Opportunity
Revenue	ProductId	Product
Revenue	OwnerId	User
Sample Lot	BookId	Book
Sample Transaction	BookId	Book
Service Request	AccountId	Account
Service Request	AssetId	Asset
Service Request	BookId	Book
Service Request	ContactId	Contact
Service Request	CustomObject1Id	CustomObject1
Service Request	CustomObject2Id	CustomObject2
Service Request	CustomObject3Id	CustomObject3
Service Request	DealerId	Dealer
Service Request	ProductId	Product
Service Request	OwnerId	User
Service Request	VehicleId	Vehicle
Solution	CustomObject1Id	CustomObject1
Solution	CustomObject2Id	CustomObject2
Solution	CustomObject3Id	CustomObject3
Solution	ProductId	Product
Special Pricing Request	BookId	Book
Vehicle	AccountId	Account
Vehicle	BookId	Book
Vehicle	PrimaryContactId	Contact
Vehicle	CustomObject1Id	CustomObject1

Record Type	Foreign Key	Referenced Record Type
Vehicle	CustomObject2Id	CustomObject2
Vehicle	CustomObject3Id	CustomObject3
Vehicle	ProductId	Product
Vehicle	SellingDealerId	Dealer
Vehicle	ServicingDealerId	Dealer
Vehicle	OwnerId	User

In addition, the following foreign key fields are common to all record types, and they reference the following user record types:

- CreatedById
- ModifiedById

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## JulianDay

The JulianDay function in Expression Builder returns the number of days that have elapsed since noon Universal Time, January 1, 4713 BC.

### Syntax

JulianDay(date)

### Result Type

Integer

### Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type.



Argument	Description
	To return the value for today's date, use the following syntax:  JulianDay(Today())

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## JulianMonth

The JulianMonth function in Expression Builder returns an integer that is equal to:

$$JulianYear * 12 + current\_month$$

where *JulianYear* is the year that is returned by the [JulianYear](#) (on page 627) function, *current\_month* is an integer from 1-12, and January is 1.

### Syntax

JulianMonth(date)

### Result Type

Integer

### Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type.  To return the value for today's date, use the following syntax:  JulianMonth(Today())

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)

- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## JulianQtr

The JulianQtr function in Expression Builder returns an integer that is equal to:

$$JulianYear * 4 + current\_quarter$$

where *JulianYear* is the year returned by the [JulianYear](#) (on page 627) function, and *current\_quarter* is:

$$(current\_month - 1) / 3 + 1$$

rounded down to the next integer.

## Syntax

JulianQtr(date)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type.  To return the value for today's date, use the following syntax:  JulianQtr(Today())

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## JulianWeek

The JulianWeek function in Expression Builder returns an integer that is equal to:

$$JulianDay / 7$$

rounded down to the next integer, where *JulianDay* is the day that is returned by the [JulianDay](#) (on page 624) function.

## Syntax

JulianWeek(date)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianWeek(Today())</p>

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## JulianYear

The *JulianYear* function in Expression Builder returns an integer that is equal to:

*current\_year* + 4713

## Syntax

JulianYear(date)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type.  To return the value for today's date, use the following syntax:  JulianYear(Today())

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Left

The Left function in Expression Builder returns a specified number of characters from the left side of a string.

## Syntax

Left(string, length)

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the leftmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to return. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

## Examples

If the current user's email address is john.doe@oracle.com, the following example returns the value john:

```
Left(UserValue('<EmailAddr>'), 4)
```

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Len

The Len function in Expression Builder returns the number of characters in a specified string.

## Syntax

Len(string)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are counted. If the string is blank, 0 (zero) is returned. If the string contains Null, Null is returned.

## Examples

The following example returns the value 18:

```
Len("Oracle Corporation")
```

The following example returns the value 19 if the field contains a valid timestamp:

```
Len([<CreateDate>])
```

The following example returns the value 19:

```
Len(Timestamp()) returns 19
```

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## LN

The LN function in Expression Builder returns the natural log of the number passed in the argument.

### Syntax

LN(number)

### Result Type

Number

### Arguments

The following table describes the arguments for the function.

Argument	Description
number	The number for which the natural log is to be returned.

### Examples

The following example:

LN(10)

returns the value 2.30.

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Locale

The Locale function in Expression Builder returns the locale code for the signed-in user, for example, ENU.

### Syntax

Locale()

### Result Type

String

#### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## LocaleListSeparator

The LocaleListSeparator function in Expression Builder returns the list separator character for the current locale, for example, a comma (,).

### Syntax

LocaleListSeparator()

### Result Type

String

#### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## LookupName

The LookupName function in Expression Builder finds a row in the List of Values table where all of the following are true:

- The TYPE field matches the type argument.
- The CODE field matches the lang\_ind\_code argument.
- The LANG\_ID field matches the language code of the currently active language.

This function returns the untranslated value (the language independent code) of the display value in the specified List of Values.

**TIP:** When specifying the parameters for the LookupName function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for a variety of data that the field can hold.)

## Syntax

LookupName(type, lang\_ind\_code)

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.
lang_ind_code	The display value.

## Example

If CALIFORNIA is the display value and CALIF is the language independent code, both of the following examples return the value CALIF:

```
LookupName('STATE_ABBREV', 'CALIFORNIA')
```

```
LookupName('STATE_ABBREV', 'CALIF')
```

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)



- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## LookupValue

The LookupValue function in Expression Builder returns a specified picklist value that is translated into the currently active language.

Picklist values are stored in the List of Values table. The LookupValue function returns the value in the VAL column of a row where all of the following are true:

- The TYPE column matches the type argument.
- The CODE column matches the lang\_ind\_code argument.
- The LANG\_ID column matches the language code of the currently active language.

The LookupValue function allows Oracle CRM On Demand to evaluate expressions involving picklist values uniformly across locales. For example, the value *White* in English is evaluated in the same way as the value *Blanc* in French.

**TIP:** When specifying the parameters for the LookupValue function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for different data that the field can hold.)

**NOTE:** The Sales Stage field in opportunity records is not a true picklist field. The LookupValue function does not work on this field.

## Syntax

LookupValue (type, lang\_ind\_code)

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.
lang_ind_code	The untranslated value in the list of values.

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Mid

The Mid function in Expression Builder returns a specified number of characters from a string.

**TIP:** To determine the number of characters in a string, use the [Len](#) (on page 629) function.

## Syntax

Mid(string, start, length)

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are returned. If the string contains Null, a blank string is returned.
start	The field name or expression that specifies the character position in the string at which the length count begins. If the value of the start argument is greater than the number of characters in the string, the Mid function returns a blank string.
length	Optional. The field name or expression that specifies the number of characters to return. If this argument is not used, or the length specified is greater than the number of characters that can be returned, all characters from the start position to the end of the string are returned.

## Examples

The following example returns seven characters (Builder), beginning with the twelfth character in a string:

```
Mid("Expression Builder is easy!!", 12, 7)
```

The following examples return seven characters, beginning with the twelfth character from a text field that contains the text: *Expression Builder is easy!!*

```
Mid('<TextFieldName>',12, 7)
```

or

```
Mid([<TextFieldName>],12, 7)
```

The following example extracts the domain name from an email address:

```
Mid([<CreatedbyEmailAddress>],FindOneOf([<CreatedbyEmailAddress>], "@" ) + 1,  
Len([<CreatedbyEmailAddress>]))
```

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## OrganizationName

The OrganizationName function in Expression Builder returns the organization name of the signed-in user.

### Syntax

```
OrganizationName()
```

### Result Type

String

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## PRE

The PRE function in Expression Builder returns the previous value of the specified field when the field value is modified but before the value is updated in the database.

**CAUTION:** It is strongly recommended that you do not use the PRE function with workflow rules containing a Wait action, because the Wait action affects the PRE function. Any actions following the Wait action are not performed until the specified wait period has expired. The remaining actions are performed in a different batch operation than the operation where the rule was originally triggered, and the values of the fields on the record prior to the action that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of the field are always considered to be the same.

## Syntax

PRE('<fieldname>')

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
fieldname	The name of the field that was modified.

The following considerations apply when using the PRE function:

- In conditional expressions, such as workflow conditions and validation statements, when you use the PRE function to retrieve the previous value of a field, remember that the initial value of the field can be blank (that is, a null value). If the initial value is null, any comparison with a non-null value results in unpredictable behavior. To ensure that conditional expressions are evaluated correctly in such cases, use the PRE function with the IfNull function as shown in this example:

```
IfNull([<FieldName>], "Invalid") <> IfNull(PRE('<FieldName>'), "Invalid")
```

In this example, the text string *Invalid* is used to replace the null value, but you can use any string that you want, provided that the string does not exist as a value in the field that is being examined.

- If the PRE function is used in a workflow rule or action that is invoked after a Wait action, the function does not return the previous value of a field. However, you might have a business process that requires such comparisons. In such cases, you can use a workflow rule with the Before Modified Record Saved trigger event to store the previous value of a field in any unused field on the record type. You can then use the stored field value for any comparisons you require in workflow rules that have the Wait action.

When you create the workflow rule to store the previous value of a field in an unused field on the record type, remember that the previous value of the original field might be blank (that is, a null value). Therefore, you must use an expression such as the following to store a default value if a null value is encountered:

```
IfNull([<FieldName>], "Invalid")
```

In this example, the text string *Invalid* is the default value that is used to replace a null value, but you can use any string you want, provided that the string does not exist as a value in the original field.

## Example of Creating a Workflow Rule That Sends an Email to the Previous Owner of an Account Record

The following is an example of how to create a workflow rule that sends an email to the previous owner of an account record when the owner of the record is changed.

### *To create a workflow rule that sends an email to the previous owner of an account record*

- 1 Create a workflow rule for the Account record type with the When Modified Record Saved trigger event.
- 2 Save the workflow rule.
- 3 Create an Add an Email action on the workflow rule.
- 4 On the workflow action, do the following:
  - a In the To field, select Specific Email Address.
  - b In the To field expression text box, add the following expression:  
`JoinFieldValue('<User>', IfNull(PRE('<OwnerId>'), "admin@mycompany.com"), '<EMailAddr>')`
  - c Add the necessary text in the subject and body of the email.
  - d Save the workflow action.

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Right

The Right function in Expression Builder returns a specified number of characters from the right side of a string.

### Syntax

Right(string, length)

### Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the rightmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to return. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

## Examples

If the current user's email address is john.doe@oracle.com, the following example returns the value oracle.com:

```
Right(UserValue('<EmailAddr>'),  
Len(UserValue('<EmailAddr>'))-InStr(UserValue('<EmailAddr>'),'@'))
```

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## RowIdToRowNum

The RowIdToRowNum function in Expression Builder converts an alphanumeric Row ID to a numeric format.

**NOTE:** Row IDs are generated by Oracle CRM On Demand using a proprietary algorithm, and have full referential integrity across the Oracle CRM On Demand database. The algorithm uses Base-36 encoding, a positional numeral system where the radix is 36. Using 36 as the radix allows the digits to be represented by the numbers 0-9 and the letters A-Z, which is an optimized, case-insensitive alphanumeric numeral system, based on ASCII characters.

## Syntax

```
RowIdToRowNum('row_id')
```

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
row_id	The string literal, field name, or expression that returns an alphanumeric row ID.

## Examples

The following example:

```
RowIdToRowNum('12-6RX8L').
```

returns the value 38-8021253.

The following example:

```
RowIdToRowNum('12-Y09KG')
```

returns the value 38-57119344.

If the <AccountID> field contains '12-Y09KG', the following example:

```
RowIdToRowNum('<AccountID>')
```

returns the value 38-57119344.

## Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## RowNum

The RowNum function in Expression Builder returns the position of the record within the active set of records.

## Syntax

```
RowNum()
```

## Result Type

Integer

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Timestamp

The Timestamp function in Expression Builder returns the server date and time converted to the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Timestamp function converts the server time to EDT. The TimeStamp function performs UTC (universal time code) conversion.

**NOTE:** Arithmetic operations (for example, add or subtract) are not supported with the Timestamp() function.

### Syntax

Timestamp()

### Result Type

Date Time

### Examples

The following example returns the current date and time, in the format month/day/year hours24:minutes:seconds:

```
Timestamp()
```

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## ToChar

The ToChar function in Expression Builder converts a specified date or numeric expression to a formatted string.



## Syntax

ToChar(expression, format)

**CAUTION:** Do not use both date formats and number formats in an instance of the ToChar function. Doing so can lead to invalid results.

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
expression	An expression or field that returns a date, date and time, or a numeric value.
format	A string that represents the date or number format.

The following table describes the date formats for the function.

Format Code	Description
DD	A two-digit day of month (01-31).
DDDD dddd	The name of the day.
MM	A two-digit month number (01-12 where 01 is JAN). You must use <i>MM</i> in uppercase, because <i>mm</i> in lowercase indicates minutes.
MMMM mmmm	The name of the month. Note that if you use lowercase, you must use <i>mmmm</i> (that is, the letter m in lowercase, four times), because <i>mm</i> (that is, the letter m in lowercase, twice) indicates minutes.
Y	The last digit of the year.
YY	The last two digits of the year.
YYYY	A four-digit year.
hh12	The hour of day in 12-hour format.
hh24	The hour of day in 24-hour format.

Format Code	Description
hh	The hour of the day. You can specify AM or PM to adjust the time accordingly, for example:  hh:mm:ss PM  If you do not specify AM or PM, the 24-hour format is used by default.
mm	The minutes. Note that mm (that is, the letter m in lowercase, twice) always indicates minutes and cannot be used to specify a two-digit day of the month.
ss	The seconds.

The following table describes the number formats for the function.

Format Code	Example	Description
#	####	Returns the value with the specified number of digits, with a leading minus sign if the value is negative.
0	####.00	Returns leading zeros. Returns trailing zeros.
\$	\$####.00	Returns the value with a leading dollar sign.
,	#,###	Returns a comma in the specified position. A comma cannot appear to the right of the decimal point. The format model must not begin with a comma.
.	###.##	Returns a decimal point in the specified position. Only one decimal point is allowed in the format parameter. If the number of digits specified after the decimal point is less than the number of digits available after the decimal point, the decimal will be rounded up.

## Examples Using Number Formats

The following example returns the value 10:

```
ToChar (10, '###.##')
```

The following example returns the value 10:

```
ToChar (10, '##.00')
```

The following example returns the value 10.24:

```
ToChar (10.2388, '##.00')
```

The following example returns the value -10.24

```
ToChar (-10.2388, '###.##')
```

## Examples Using Date Formats

The following example converts the value returned by the Timestamp() function into DD/MM/YYYY format:

```
ToChar(Timestamp() , 'DD/MM/YYYY')
```

For example, if the Timestamp() function returns a value of 02/29/2008 10:58:37, the previous expression evaluates to 29/02/2008.

The following examples show how midnight is shown using various formats:

ToChar(Today(), YYYY/MM/DD hh:mm:ss PM) returns 2009/05/22 12:00:00 AM

ToChar(Today(), YYYY/MM/DD hh:mm:ss) returns 2009/05/22 00:00:00

ToChar(Today(), YYYY/MM/DD hh24:mm:ss PM) returns 2009/05/22 00:00:00

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Today

The Today function in Expression Builder returns today's date based on the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Today() function converts the server day to EDT. The Today() function performs UTC (universal time code) conversion.

### Syntax

Today()

### Result Type

Date

### Examples

If the current date is 11/27/2007, the following example:

```
Today() - 30
```

returns the value 10/28/2007.

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## UserValue

The UserValue function in Expression Builder returns the value of a specified attribute for the current user. The fields on the User Detail view are attributes of the selected user.

### Syntax

UserValue('<attribute>')

### Result Type

String

### Arguments

The following table describes the arguments for the function.

Argument	Description
attribute	The language-independent name or customized integration tag that corresponds to the display name of the current user attribute.

### Examples

Example1: A business process requires that a custom text field called Origin on a service request is to display by default the country of the user who creates the record (the current user) when the record is created.

To implement the business rule, in the Field Setup page for service requests, set the default value for the Origin field to UserValue('<PersonalCountry>'), and select the Post Default check box.

For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 75).

Example 2: A business process requires that a certain workflow rule is triggered if the owner of an opportunity is not the administrator.

To implement the business rule, set up the following condition on the workflow rule:

UserValue('<EMailAddr>') <> 'administrator@testdata.com'

## Attributes

The following table lists the attributes that can be used as arguments in the UserValue function, and their corresponding display names.

Attribute	Display Name	Sample Value
Alias	Alias	Admin
AuthenticationType	Authentication Type	User ID/Password Only
BusinessUnit	Business Unit	Business Unit
BusinessUnitLevel1	Business Unit Level 1	Business Unit L1
BusinessUnitLevel2	Business Unit Level 2	Business Unit L2
BusinessUnitLevel3	Business Unit Level 3	Business Unit L3
BusinessUnitLevel4	Business Unit Level 4	Business Unit L4
CellPhone	Cellular Phone #	+1 555 2368978
CreatedBy	Created By	Oracle CRM On Demand CSR Admin
CreatedById	Not available	1E1263-IZBZ
CreatedDate	Created Date	01/08/2007 21:21:33
CurrencyCode	Currency	USD
Department	Department	Department
Division	Division	Division
EMailAddr	Email	john.doe@oracle.com
EmployeeNumber	Employee Number	12345
EnableTeamContactsSync	Enable Sync of Team Contacts	Y
ExternalIdentifierForSingleSignOn	External Identifier for Single Sign-On	UID=ADMIN,O=ORACLE
ExternalSystemId	External Unique ID	EXTUID123
FirstName	First Name	John
FundApprovalLimit	Fund Approval Limit	50000
IntegrationId	Integration ID	INTUID123
JobTitle	JobTitle	Product Manager
Language	Language	English-American

Attribute	Display Name	Sample Value
LastLoggedIn	Last Sign In	10/31/2007 19:39:01
LastName	Last Name	Doe
LeadLimit	Lead Limit	2345679
Locale	Locale	English - Canada
ManagerFullName	Reports To	John Smith
ManagerId	Not available	1E4763-IZAU
Market	Market	Market
MiddleName	Middle Name	Middle
MiscellaneousNumber1	Miscellaneous Number 1	2312
MiscellaneousNumber2	Miscellaneous Number 2	2312
MiscellaneousText1	Miscellaneous Text 1	DUNS # (Webcat) = 10461
MiscellaneousText2	Miscellaneous Text 2	a7cff064-6566-47a2-8629-8b32d92de222
ModifiedBy	Modified By	John Doe
ModifiedById	Not available	1E1263-IZBZ
ModifiedDate	Modified Date	10/31/2007 19:32:58
MrMrs	Mr./Ms.	Mr.
NeverCall	Never Call	Y
NeverEmail	Never Email	Y
NeverMail	Never Mail	Y
PasswordState	Password State	Active
PersonalCity	City	Toronto
PersonalCountry	Country	Canada
PersonalPostalCode	Postal Code	M4C2C3
PersonalProvince	Province	Ontario
PersonalState	State/Province	CA
PersonalStreetAddress	Street	555 Main Avenue
PersonalStreetAddress2	Address 2	Suite 17
PersonalStreetAddress3	Address 3	Scarborough

Attribute	Display Name	Sample Value
PhoneNumber	Work Phone #	+1 555 2365555
PrimaryGroup	Primary Group	User Group A
Region	Region	My Region
Role	Role	Field Sales Rep
RoleId	Role Id	1E1263-IYG1
SecondaryEmail	Secondary Email	john.doe2@oracle.com
ShowWelcomePage	Show Welcome Page on Sign In	N
Status	Status	Active
SubMarket	Submarket	My submarket
SubRegion	Subregion	My sub region
TempPasswordFlag	Email Temporary Password When I Click Save	Y
TimeZoneName	Time Zone	(GMT-05:00) Eastern Standard Time (US & Canada)
UserId	Row Id	1E1263-IZAU
UserLoginId	Row Id	1E1263-IZAU
UserSignInId	User Sign In ID	PTE169-14/ADMIN
WorkFax	Work Fax #	+1 555 2365556

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## UtcConvert

The UtcConvert function in Expression Builder converts the specified date and time from the current user's time zone setting, and returns the date and time in the specified time zone.

## Syntax

UtcConvert(utc\_date\_time, time\_zone)

## Result Type

Time

## Arguments

The following table describes the arguments for the function.

Argument	Description
utc_date_time	The date and time according to the current user's time zone setting in the format: MM/DD/YYYY HH24:MI:SS
time_zone	The name of a time zone

## Examples

If the current user's time zone setting is (GMT-05:00) Eastern Time (US & Canada), the following example:

```
UtcConvert('12/14/2007 17:07:05', 'Pacific Standard Time')
```

returns the following value:

```
12/14/2007 12:07:05
```

If the current user's time zone setting is (GMT+05:30) Calcutta, Chennai, Mumbai, New Delhi, the following example:

```
UtcConvert('12/14/2007 15:07:05', 'Eastern Standard Time')
```

returns the following value:

```
12/14/2007 04:37:05
```

The following examples show how to get the corresponding UTC time for Western European Time:

```
UtcConvert(Timestamp(), "(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna")
```

```
UtcConvert(Timestamp(), "W. Europe Daylight Time")
```

```
UtcConvert(Timestamp(), "W. Europe Standard Time")
```

The following examples show how to get the corresponding UTC time for South African Time:

```
UtcConvert(Timestamp(), "(GMT+02:00) Harare, Pretoria")
```

```
UtcConvert(Timestamp(), "South Africa Daylight Time")
```

```
UtcConvert(Timestamp(), "South Africa Standard Time")
```

If the name of a time zone contains a special character, such as a single quotation mark (') or a comma (,), you must enclose the name of the time zone, or the special character, in double quotation marks. For example:

```
%% UtcConvert('08/03/2009 12:01:33', "(GMT+13:00) Nuku" + "'" + "alofa")%%
```



```
%%UtcConvert('08/03/2009 12:01:33', "(GMT+13:00) Nuku'alofa")%%
```

### Related Topics

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

## Expression Builder Examples

In Expression Builder, you can use the sample expressions in the following table.

Expression Builder Sample Expressions	
<b>Update the field Opportunity Margin</b>	
Description	Update the field Opportunity Margin
Syntax	[<OpportunityMargin>] = [<OpportunityRevenue>] - [<OpportunityCost>]
<b>Validate small deals</b>	
Description	Field Validation. 'Small Deal' cannot have revenue greater than 1,000,000
Syntax	<= IIf (FieldValue('<OpportunityCategory>') = 'Small Deal', 1000000, [<Revenue>])
<b>Assign a newly-created Service Request to the creator</b>	
Description	Whenever a Service Request is created, set UserId as the default for the Service Request field 'Owned By Id'.
Syntax	[<OwnerId>] = UserValue('<UserId>')
<b>Check if the values of specified fields have changed</b>	
Description	Check for changes in field values
Syntax	(PRE('<ActualCost>') <> [<ActualCost>]) OR (PRE('<BudgetedCost>') <> [<BudgetedCost>])
<b>Trigger a workflow based on a close date</b>	
Description	If the close date is modified by more than a month, execute the workflow.
Syntax	([<CloseDate>] - PRE('<CloseDate>')) > 30

**Trigger a workflow if an opportunity reaches a certain stage without a contact**

Description	If an opportunity reaches the Closed/Won sales stage without having a contact, execute the workflow.
Syntax	FieldValue('<SalesStage>') = "Closed/won" AND PRE('<SalesStage>') <> [<SalesStage>] AND [<KeyContactId>] = "No Match Row Id"

**Trigger a workflow when a check box is selected**

Description	If the custom Ready for Review check box field is selected, execute the workflow.
Syntax	FieldValue('<bReady_for_Review_ITAG>') = 'Y' AND (PRE('<bReady_for_Review_ITAG>') = 'N' OR IfNull(bReady_for_Review_ITAG, 'Y') = 'Y' )

**Check whether the current user is the record owner**

Description	Check whether the owner of a record is the current user. In this case, the IfNull function is used because the Owner field might be null.
Syntax	IfNull([<OwnerId>], "Invalid") = UserValue('<UserId>')

**Trigger an email when Account type is changed**

Description	Trigger an email when Account type is changed from "Prospect" to "Customer"
Syntax	PRE('<AccountType>') = "Prospect" AND FieldValue('<AccountType>') = "Customer"

**Exclude a specific channel from a workflow**

Description	Do not execute a workflow for an online record
Syntax	PRE('<CampaignType>') = "Advertisement" AND ExcludeChannel("Online")

**Related Topics**

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 588)
- [Using Expression Builder](#) (on page 589)
- [Expression Builder Functions](#) (on page 601)

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