Siebel

Developer's Reference

January 2020



Siebel
Developer's Reference

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

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1 What's New in This Release

What's New in Siebel Developer's Reference, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

What's New in Siebel Developer's Reference, Siebel CRM 19.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Overview for Using This Book

Overview for Using This Book

This book describes reference information that you can use to configure Oracle's Siebel CRM. It uses the following terms:

- A user is a person who uses the client of a Siebel Business Application to access Siebel CRM data.
- The client is the client of a Siebel Business Applications. Siebel Call Center is an example of a Siebel Business Application.
- The server is the Siebel Server, unless noted otherwise.
- An administrator is anyone who uses an administrative screen in the client to configure Siebel CRM. The Administration - Server Configuration screen is an example of an administrative screen.

This book describes reference information. For information about how to configure Siebel CRM, see *Configuring Siebel Business Applications* .

Computer font indicates a value you enter or text that Siebel CRM displays. For example:

```
This is computer font
```

Italic text indicates a variable value. For example, the n and the method_name in the following format description are variables:

```
Named Method n: method_name
```

The following is an example of this code:

```
Named Method 2: WriteRecord
```

A predefined object is an object that comes defined with Siebel CRM. The objects that Siebel Tools displays in the Object List Editor immediately after you install Siebel Tools and the Siebel runtime repository but before you make any customization are predefined objects.

The term focus indicates the currently active object in the client. To indicate the object that is in focus, Siebel CRM typically sets the border of this object to a solid colored line.

Depending on the software configuration you purchase, your Siebel Business Application might not include all the features that this book describes.

How This Book Describes Objects

For brevity, this book describes how an object, such as a user property, does something. For example, this book states the following:

The Copy Contact user property copies contacts.

In reality, the Copy Contact user property only includes information that some other Siebel CRM component uses to copy contacts.

For brevity, to describe how Siebel CRM uses the value that a property contains, this book typically only describes the property name. For example, assume Siebel CRM displays the value that the Display Name property contains. This is a property of a tree node object. This book only states the following:

Siebel CRM displays the Display Name property of the tree node.

In reality, Siebel CRM displays the value that the Display Name property contains.

How This Book Describes Relationships Between Objects

An object definition includes properties and a property includes a value. For example, the Business Object property of the Account Address view contains a value of Account. To describe this relationship, this book states the following:

The Account Address view references the Account business object.

Sometimes the relationship between objects occurs through multiple objects. For brevity, this book does not always describe the entire chain of relationships that exists between objects through the entire Siebel object hierarchy. For example, because the Account business object references the Account business component, and the Account Address view references the Account business object, this book states the following:

The Account Address view references the Account business component.

Getting Help From Oracle

If you require help from Oracle for using object types, you can create a service request (SR) on My Oracle Support. Alternatively, you can phone Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers are listed on My Oracle Support. You can also contact your Oracle sales representative for Oracle Advanced Customer Services to request assistance from Oracle's Application Expert Services.

3 Applet Classes

Applet Classes

This chapter describes applet classes. It includes the following topics:

- *Overview of Applet Classes*
- *CSSSWEFrame Class*
- *CSSSWEFrameBase Class*
- *CSSSWEFrameList Class*
- *CSSSWEFrameListBase Class*
- *CSSSWEFrameListFile Class*
- *CSSSWEFrameListDocGen Class*
- *CSSSWEFrameListWeb Class*
- *CSSSWEFrameSalutation Class*
- *CSSSWEFrameContactOrgChart Class*
- *CSSSWEFrameListFINApplication Class*
- *CSSSWEFrameUserRegistration Class*

Overview of Applet Classes

An applet class is an object type that Siebel CRM uses to create an instance of a frame object. For important caution information, see *Using Specialized Classes*.

Using SWE Classes Starting with Siebel CRM Version7.x

Starting with Siebel CRM version 7.x, the Siebel Web Engine converts all classes that include a CSSFrame prefix in the class name to a counterpart class that includes a CSSSWEFrame prefix. For example, Siebel CRM converts a call that calls a method in the CSSFrameBase class to a call that calls the corresponding method in the CSSSWEFrameBase class. It does this conversion at run time.

The descriptions in this chapter use the SWE name for the class. These descriptions also apply to the corresponding class that does not use SWE. For example, the description for the CSSSWEFrame class also applies to the CSSFrame class.

CSSSWEFrame Class

The CSSSWEFrame class represents an applet that resides in the Siebel UI Frameworks. You can use this class to call a generalized applet method.

The CSSSWEBase class is the parent of this class.

The *Specifying the Method That the Enter Key Calls* applet user property can reference the CSSSWEFrame class.

The CSSSWEFrame class requires the CSSSWEFrameMgr class and the business component objects that use the CSSSWEFrameMgr class.

The CSSSWEFrame class can reference the following methods:

- ExecuteQuery. Runs the query. You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from an external interface.
- NewQuery. Modifies the mode to query mode and starts a new query.
- Other methods. Any method that Siebel CRM gets from a CSSSWEBase method.

You can specify each method in the Method property of a class method. This class method is a child of the CSSSWEFrame class.

CSSSWEFrameBase Class

The CSSSWEFrameBase class provides functionality through applet user properties and call methods, such as Aspect user properties and the GotoView method.

The FrameListBase classes provide the same support as their FrameBase counterparts. The following descriptions also apply to the CSSFrameListBase class and the CSSSWEFrameListBase class.

Siebel CRM uses the CSSSWEFrameBase class for basic frame support. It uses applet user properties and methods that are common to many Siebel Business Applications.

The CSSSWEFrame class is the parent of this class.

The following topics describe applet user properties that can reference the CSSSWEFrameBase class:

- *Using Aspects to Control Read Only, Insert, and Other Behavior*
- *Specifying the Method That the Enter Key Calls*

The CSSSWEFrameBase class can reference the following methods:

- GotoPage. Displays a Web page. The Page user property must specify the Web page. For more information, see *Specifying the Goto Web Page*.
- GotoUrl. Displays a URL. The Url user property must specify the URL. For more information, see *Specifying the Goto URL*.
- GotoView. Displays a view. The View user property must specify the view. For more information, see *Specifying the Goto View*.

You can specify each method in the Method property of a class method. This class method is a child of the CSSSWEFrameBase class. You can configure Siebel CRM to call each of these methods only through a named method.

CSSSWEFrameList Class

The CSSSWEFrameList class:

- Represents a list applet in the Siebel UI Frameworks. You can use it to call a method that is specific to an applet.
- Requires a list object.
- Can reference any method that Siebel CRM gets from the methods described in *CSSSWEFrame Class*.

The CSSSWEFrame class is the parent of the CSSSWEFrameList class.

CSSSWEFrameListBase Class

Siebel CRM uses the CSSSWEFrameListBase class for basic frame support in a list applet. These classes provides the same support as their FrameBase counterparts. For more information about these classes, see *CSSSWEFrameBase Class*.

CSSSWEFrameListFile Class

Siebel CRM uses the CSSSWEFrameListFile class for file attachment frames in Siebel UI Frameworks. You can use it to call file attachment methods.

The CSSSWEFrameList class is the parent of the CSSSWEFrameListFile class.

The business component that provides data to the file attachment frame must reference the CSSBCFile class.

CSSSWEFrameListDocGen Class

The CSSSWEFrameListDocGen class supports proposal and presentation features. It does the following work:

- Sets the document context. For example, opportunity proposal, account proposal, and so on.
- Sets the context. For example, Microsoft Word or Microsoft PowerPoint.
- To create proposals, it submits requests to the Document Server server component.

The following classes are specialized subclasses of the CSSSWEFrameListDocGen class:

- CSSFrameListProposal and CSSSWEFrameListProposal. Sets the type of document as a proposal. Supports proposal applets that create Microsoft Word documents.
- CSSFrameListPresentation and CSSSWEFrameListPresentation. Sets the type of document as a presentation. Supports presentation applets that create Microsoft PowerPoint documents.

These subclasses get all other functionality from the CSSSWEFrameListDocGen class. For important caution information, see *Using Specialized Classes*.

The CSSSWEFrameList class is the parent of this class.

The following topics describe applet user properties that can reference the CSSSWEFrameListDocGen class:

- *Specifying the Application That Creates Proposals*
- *Specifying the Parent Business Component*
- *Specifying the DefaultAppletFocus*
- *Removing Duplicate Records From Queries*

CSSSWEFrameListWeb Class

The CSSSWEFrameListWeb class is a specialized frame class that Siebel CRM uses for ERM (Employee Relationship Management), ePortal, and eBriefing applications. The Compensation Planning and Group New modules in ERM use this class. It supports hiding an applet with no data, field visibility control, and other support for ERM applications.

You can use this class only in a Siebel application that uses ERM. If you must use a modified version of the CSSSWEFrameListWeb class, then you must create a new class that references the CSSSWEFrameListWeb class. You must not make modifications directly to the CSSSWEFrameListWeb class.

The CSSSWEFrameList class is the parent of the CSSSWEFrameListWeb class.

The applet user property described in *Hiding Applets That Contain No Data* can reference the CSSSWEFrameListWeb class.

For important caution information, see *Using Specialized Classes*.

CSSSWEFrameSalutation Class

The CSSSWEFrameSalutation class supports the salutation frame. You can use it to display a salutation, typically in the home page. It contains a control named Explorer that it uses to display data. The frame removes the field values from the Result Text column and displays them together when it displays the Explorer control.

The CSSSWEFrame class is the parent of the CSSSWEFrameSalutation class.

The CSSSWEFrameSalutation class can reference any method that Siebel CRM gets from the methods described in *CSSSWEFrame Class*.

CSSSWEFrameContactOrgChart Class

CSSSWEFrameContactOrgChart supports the Contact Organization Chart frame and applet.

The CSSSWEFrame class is the parent of the CSSSWEFrameContactOrgChart class.

The following topics describe applet user properties that can reference the CSSSWEFrameContactOrgChart class:

- *Specifying Relationships in Organization Charts*

- *Specifying Gantt Chart Behavior*
- *Specifying Political Influence in Organization Charts*

CSSSWEFrameListFINApplication Class

The CSSSWEFrameListFINApplication class provides specialized support in applets that Siebel CRM uses for personal or business transactions, such as applying for credit or opening an account.

You can use this class only with an applet that references the Opportunity business component. This class sets the Application Flag field to TRUE.

The CSSSWEFrameListBase class is the parent of this class.

The applet user property described in *Disabling Methods for FINS Applets in Query Mode* can reference the CSSSWEFrameListFINApplication class.

For important caution information, see *Using Specialized Classes*.

CSSSWEFrameUserRegistration Class

The CSSSWEFrameUserRegistration class supports required fields in applets in the User Registration module. In some situations, it might be necessary to get information from a user that a business component record does not require. You can use this class to enforce this kind of requirement.

The CSSSWEFrame class is the parent of the CSSSWEFrameUserRegistration class.

The applet user property described in *Disallowing Users to Pick Dates in the Forecast Date Dialog Box* can reference the CSSSWEFrameUserRegistration class.

You can use the CSSSWEFrameUserRegistration class only with the User Registration module. This class assumes that the business component that provides data in this situation references the CSSBCUser class. For example, the User Registration business component.

If your configuration uses the Show Required user property, then the corresponding business component must reference the CSSBCUser class. The control that this user property specifies must reside in the applet. If it does not, then the user cannot enter a value for the required control.

4 Business Component Classes

Business Component Classes

This chapter describes business component classes. It includes the following topics:

- *Overview of Business Component Classes*
- *CSSBusComp Class*
- *CSSBCBase Class*
- *CSSBCAccountSIS Class*
- *CSSBCActivity Class*
- *CSSBCActivityPlan Class*
- *CSSBCContactSIS Class*
- *CSSBCFile Class*
- *CSSBCFINOppty Class*
- *CSSBCFINSActivity Class*
- *CSSBCForecast Class*
- *CSSBCForecastBase Class*
- *CSSBCForecastItem Class*
- *CSSBCForecastItemDetail Class*
- *CSSBCFundReq Class*
- *CSSBCOppty Class*
- *CSSBCOrderMgmtQuoteItem Class*
- *CSSBCPharmaSpecializedAct Class*
- *CSSBCPosition Class*
- *CSSBCProposal Class*
- *CSSBCServiceRequest Class*
- *CSSBCTaskTransient Class*
- *CSSBCTaskTransientBase Class*
- *CSSBCUser Class*

Overview of Business Component Classes

This topic describes an overview of business component classes. It includes the following topics:

- *Generalized and Specialized Business Component Classes*
- *Guidelines for Using Methods in Business Component Classes*
- *Calling a Method*

Generalized and Specialized Business Component Classes

This topic describes generalized and specialized business component classes.

Generalized Business Component Classes

The following classes are generalized business component classes:

- *CSSBusComp Class*
- *CSSBCBase Class*

Using Specialized Classes

A specialized business component class is a type of class that Siebel CRM creates from a generalized business component class.

A specialized applet class is a type of class that Siebel CRM creates from a generalized applet class.

It is recommended that you use a specialized class only if necessary. It is recommended that you do not use a specialized business component class with a typical business component or applet. These specialized classes often use functionality that references other objects, such as fields, other business components, applets, or other classes. You must not configure Siebel CRM in such a way that it modifies the values that these objects contain.



CAUTION: Using a specialized business component class or applet class improperly might cause an unpredictable problem that can be difficult to fix. For example, Siebel CRM might add or delete a child record, or modify an associate record. A run-time error might occur. It is recommended that you configure the class property with extreme care and thoroughly test any modification you make.

Oracle only supports methods that *Siebel Object Interfaces Reference* describes for use in scripting. Modifying method logic before or after Siebel CRM calls this method can cause unpredictable behavior.

The following classes are specialized business component classes:

- *CSSBCAccountSIS Class*
- *CSSBCActivity Class*
- *CSSBCActivityPlan Class*
- *CSSBCContactSIS Class*
- *CSSBCFile Class*
- *CSSBCFINOppty Class*
- *CSSBCFINSActivity Class*
- *CSSBCForecast Class*
- *CSSBCForecastBase Class*
- *CSSBCForecastItem Class*
- *CSSBCForecastItemDetail Class*
- *CSSBCOppty Class*
- *CSSBCOrderMgmtQuoteItem Class*
- *CSSBCPharmaSpecializedAct Class*
- *CSSBCPosition Class*

- *CSSBCProposal Class*
- *CSSBCServiceRequest Class*
- *CSSBCTaskTransient Class*
- *CSSBCTaskTransientBase Class*
- *CSSBCUser Class*

Guidelines for Using Methods in Business Component Classes

If you configure a method that Siebel CRM can access in a business component class, then it is recommended that you use the following guidelines:

- You can use a method in a script only if the *Siebel Object Interfaces Reference* describes the method.
- If *Siebel Object Interfaces Reference* does not specifically state that Siebel CRM can call a method directly, then you must not assume that you can use only the method name and arguments to call a method.
- You typically configure Siebel CRM to use the InvokeMethod method to call a method.
- The format for the InvokeMethod method varies depending on the scripting language that you use. This book does not describe these specific formats.
- *Siebel Developer's Reference* lists method input arguments in the order that Siebel CRM must use them in the call, independent of the scripting language that you use.
- If a custom button or command references a method, then you typically use InvokeMethod to call this method. This is true if you use a predefined script or custom script. For more information about the InvokeMethod method, see *Siebel Object Interfaces Reference* and *Configuring Siebel Business Applications* .
- Intercepting a method or modifying method behavior before or after Siebel CRM calls it can result in unpredictable behavior.
- Unless noted otherwise, method arguments use string values.

Calling a Method

You can configure Siebel CRM to use the InvokeMethod method to call most of the methods that this book describes. In many situations you can configure Siebel CRM to call this method from one of the following items:

- Server script
- Browser script
- Custom button
- Custom command
- External interface

CSSBusComp Class

The CSSBusComp class is a base class. Siebel CRM gets other business component classes from this CSSBusComp class. It provides functionality through business component user properties and an object interface that you can use to meet typical configuration requirements.

The following topics describe business component user properties that can reference business component classes that Siebel CRM creates from the CSSBusComp class:

- *Overriding Sort Specifications on Business Components*
- *Specifying the DB2 Optimization Level for SQL Statements*

CSSBCBase Class

This topic describes the CSSBCBase class. It includes the following topics:

- *User Properties that Reference the CSSBCBase Class*
- *Methods that the CSSBCBase Class can Reference*

The CSSBCBase class is a base class. Siebel CRM creates other business component classes from this CSSBCBase class. It provides functionality through business component user properties and invoke methods, such as the On Field Update Invoke user property or the Sequence method.

The *CSSBusComp Class* class is the parent of this class.

User Properties that Reference the CSSBCBase Class

The following topics describe user properties that can reference business component classes that Siebel CRM creates from the CSSBCBase class:

- *Using Aspects to Control Read Only, Insert, and Other Behavior*
- *Specifying the DB2 Optimization Level for SQL Statements*
- *Using Deep Copy to Copy Records in Child Business Components*
- *Using Deep Delete to Delete Records in Child Business Components*
- *Extending Quote Quantities*
- *Calling Methods from Applets*
- *Calling Methods When Siebel CRM Updates Fields*
- *Updating Fields When Siebel CRM Updates Other Fields*
- *Specifying Sequential Line Numbers for New Records*
- *Specifying Sequential Line Numbers for New Records According to Maximum Values*
- *Specifying State Models*

The following topics describe field user properties that can reference business component classes that Siebel CRM creates from the CSSBCBase class:

- Aspect Default Value: Aspect (*Using Aspects to Control Read Only, Insert, and Other Behavior*)
- *Enabling Encryption on a Field*
- *Specifying the Field That Contains the Encryption Key*
- *Setting an Encrypted Field to Read Only if Encryption Fails*
- *Specifying the RC2 or AES Encryption Service*
- *Masking Credit Card, Account, and Other Secure Data*
- *Making a Field Required*

Methods that the CSSBCBase Class can Reference

This topic describes the methods that the CSSBCBase class can reference. It includes the following topics:

- *EvalBoolExpr Method*
- *EvalExpr Method*
- *IsActive Method*
- *RefreshBusComp Method*
- *RefreshRecord Method*
- *Revise Method*
- *Sequence Method*
- *SetAspect Method*

You can specify each method in the Method property of a class method. This class method is a child of the CSSBCBase class.

EvalBoolExpr Method

The EvalBoolExpr method evaluates a conditional Siebel expression against the current row. It returns one of the following values in the result parameter:

- Y. The expression is true.
- N. The expression is not true.

You can configure Siebel CRM to call the EvalBoolExpr method from each item described in *Calling a Method* except from a custom button or command.

The following table describes the method argument that you can use with the EvalBoolExpr method.

Argument	Description
expr_string	Specifies the conditional expression that Siebel CRM evaluates.

EvalExpr Method

The EvalExpr method evaluates a Siebel expression against the current row and returns the value in the result parameter. You can configure Siebel CRM to call the EvalExpr method from each item described in *Calling a Method* except from a custom button or command.

IsActive Method

The IsActive method reads the Active field value to determine if the row is active. It returns Y or N. You can configure Siebel CRM to call the IsActive method from each item described in *Calling a Method* except from a custom command.

RefreshBusComp Method

The RefreshBusComp method runs the current query for the business component and places the focus back on the record that Siebel CRM previously highlighted. It refreshes the data but highlights the same record and places the cursor in the same position it occupied in the list applet before Siebel CRM called the RefreshBusComp method. For more information about the IsActive method, see the topic about InvokeMethod methods for business components in *Siebel Object Interfaces Reference* .

You can configure Siebel CRM to call the IsActive method from each item described in *Calling a Method* except from a custom command.

RefreshRecord Method

The RefreshRecord method refreshes the currently highlighted record. It updates the business component fields in the client and positions the cursor in the context record. For more information about this method, see the topic about InvokeMethod methods for business components object in *Siebel Object Interfaces Reference* .

You can configure Siebel CRM to call the RefreshRecord method from each item described in *Calling a Method* except from a custom command.

Revise Method

The Revise method creates a new revision of the current record. Siebel CRM uses it to revise quotes, orders, and agreement records. This method is similar to BusCompCopyRecord except the Revise method does the following work:

- If the Active Field user property is defined, then it sets the current record to inactive.
- If the Locked Field and Locked By Field user properties are defined, then it locks the current record.
- Increments the revision number of the new record. The Revision Field user property specifies the field that contains the revision number.
- Copies values that exist in fields of the current record to the new record. The Revision Copy Field user property specifies the field that contains the new values.

You can configure Siebel CRM to call the Revise method from each item described in *Calling a Method* except from a custom command.

For information about the BusComp_CopyRecord event, see *Siebel Object Interfaces Reference* .

For more information, see the following topics:

- *Viewing a Business Component User Property*
- *Creating Numbered Revisions of Quotes, Orders, or Agreements*
- *Creating Numbered Revisions of Quotes, Orders, or Agreements*

Viewing an Example That Uses the Revise Method

This topic describes how to view an example that uses the revise method.

To view an example that uses the Revise Method

1. In the client, navigate to the Agreements screen, and then the Agreements List view.
2. Examine the My Agreements list that Siebel CRM displays.

   This list references the Agreement List Applet No Parent applet. The Revise command in the drop-down menu references the Revise method. If you choose a record, and then click Revise, then Siebel CRM does the following:

   - Creates a new record that duplicates the chosen record.
   - Increments the Revision field by 1.

Sequence Method

The Sequence method recreates the sequence numbers for the records in the current business component. It does this only if sequencing is enabled for this business component. Siebel CRM sets the starting value depending on which of the following situations is true:

- A field in a business component includes a sequenced field. For example, the FS Agreement Item business component includes the Line Number field. The Sequence Field user property specifies this Line Number field as the sequence field. The following business component is the corresponding business component:

  ```
  FS Agreement Item.Line Number (Sequence)
  ```

  The Predefault Value property of the sequence field defines the starting value for the sequence. This value is typically not 1.
- A predefault value is not set for the sequence. Siebel CRM defaults the starting value for the sequence to 1.

You can configure Siebel CRM to call the Sequence method from each item described in *Calling a Method*.

For more information about creating a sequence field, see *Configuring Siebel Business Applications* .

For more information, see the following topics:

- *Specifying Sequential Line Numbers for New Records*
- *Specifying Sequential Line Numbers for New Records According to Maximum Values*

SetAspect Method

The SetAspect method sets and overrides the default aspect of the current business component. The applet code or script method calls the SetAspect method to override the business component aspect with the applet aspect. You can configure Siebel CRM to call the SetAspect method only from a server script or a browser script.

The following table describes the arguments that you can use with the SetAspect method. For more information, see *Using Aspects to Control Read Only, Insert, and Other Behavior*.

Argument	Description
aspect	Specifies the name of the aspect that Siebel CRM sets as the aspect.

Argument	Description
reset_bool	Optional. You can use one of the following values: • Y. Reset the business component aspect to the default aspect. • N or no value. Set the aspect to the value that the aspect argument specifies.

CSSBCAccountSIS Class

This topic describes the CSSBCAccountSIS class. It includes the following topics:

- *Dependencies and Limitations for the CSSBCAccountSIS Class*
- *Business Component User Properties that can Reference the CSSBCAccount SIS Class*

The CSSBCAccountSIS class supports accounts. It does the following:

- Resides in the hierarchy of classes that constitute the account module in Siebel Industry Applications.
- Manages the account hierarchy through the account life cycle.
- Manages the hierarchical relationships that exist between accounts if Siebel CRM modifies an element in the hierarchy. For example, if Siebel CRM deletes a parent account or sets this parent account as the child of another parent, then the CSSBCAccountSIS class maintains the correct relationships between accounts. For example, it makes sure that it relates a child account to the correct parent and grandparent.
- Contains functionality that Siebel Life Sciences uses to schedule account calls according to the most desirable call times that Siebel CRM sets for this account.

For more information about the methods that the CSSBCAccountSIS class can reference, see *Methods that the CSSBCBase Class can Reference*.

The *CSSBCBase Class* is the parent of this class.

Dependencies and Limitations for the CSSBCAccountSIS Class

The CSSBCAccountSIS class is a specialized class. It is recommended that you do not use it with a typical business component. The Auto Schedule feature uses the names of controls in the Auto Schedule pop-up applet that Siebel CRM predefines in the class. For more information, see *Using Specialized Classes*.

You can use the CSSBCAccountSIS class only with an Account business component. The class methods perform tasks that are specific to account data. They require a specific set of fields that they use to evaluate the hierarchy.

Business Component User Properties that can Reference the CSSBCAccount SIS Class

The following topics describe business component user properties that can reference the CSSBCAccountSIS class. Siebel CRM requires each of these business component user properties:

- *Maintaining the Master Account in Account Hierarchies*

- *Specifying the Master Account Field*
- *Specifying the Field That Stores Parent Account IDs*
- *Validating Parent Account IDs*

CSSBCActivity Class

This topic describes the CSSBCActivity class. It includes the following topics:

- *Dependencies and Limitations for the CSSBCActivity Class*
- *Business Component User Properties that can Reference the CSSBCActivity Class*
- *Methods that can Reference the CSSBCActivity Class*

The CSSBCActivity class supports actions and business components that handle activities. It also supplies data for Siebel Calendar, Siebel Scheduler, and Siebel Email Response. You can use business component user properties to enable behaviors for CSSBCActivity.

The *CSSBCBase Class* class is the parent of this class.

Dependencies and Limitations for the CSSBCActivity Class

This topic describes dependencies and limitations for the CSSBCActivity class.

Fields That the CSSBCActivity Class Requires

Activities and the calendar require the following fields:

- Display. Indicates where Siebel CRM displays this activity. It can include one of the following values:
  - Calendar and Activity. Display in Calendar and Activity.
  - To Do and Activities. Display in To Do and Activity.
  - Activities Only. Display in Activity only.
- Type. Indicates that this record is an activity.

The following table describes the fields that the CSSBCActivity class requires.

Field Name	Description
The following date fields are required: • Done • Due • Due Date • Exchange Date • No Sooner Than Date • Planned • Planned Completion	For more information, see *Date Fields That the CSSBCActivity Class Requires*.

Field Name	Description
• Repeating Expires • Started	
Display	This field indicates where Siebel CRM displays the activity.
The following email fields are required: • Email Format • Email Body	These fields are required for email reply.
Orig Appt Id	This field contains the Original Appointment Id.
Owned By	This field is a multivalue group field that controls visibility.
The following primary fields are required: • Primary Owned By • Primary Owner Id	These fields control visibility.
The following repeating fields are required: • Repeating Type • Repeating	These fields specify a repeating activity for the calendar.
The following fields are required: • Alarm • Appt Alarm Time Min • Contact First Name • Contact Id • Description • Done Flag • Duration Hours • Duration Minutes • Percent Complete • Personal Postal Code • Previous Activity Id • Primary Attachment Id • Service Region • Status	Not applicable.

Date Fields That the CSSBCActivity Class Requires

Activities and calendar items depend on date fields. An action class uses a predefined validation that you cannot configure. It does this to make sure that the date that the Planned Completion field contains occurs after the dates

that the Planned fields contain. The Validation or Validation Message properties of these fields does not specify this validation.

You can write a script that configures a custom message and more restrictive validation on these fields. To capture updates to these fields and to return a custom message, you can use the BusComp_PreSetFieldValue event for the message. Any other validation that you write in the BusComp_PreSetFieldValue event for these fields must be different from or more restrictive than the validation that the classes specify. You cannot use a script to override or make the validation less restrictive. Siebel CRM runs the validation that the classes specify after the BusComp_PreSetFieldValue event finishes running. For more information about these date fields, see the topic about how Siebel CRM validates start and end dates in *Configuring Siebel Business Applications* .

How an Applet Class Determines if the CSSBCActivity Class is Required

If the Class property of an applet contains one of the following values, then the CSSBCActivity class is required:

- CSSFrameAlarmList
- CSSFrameAlarmSeeOtherList
- CSSFrameCalGrid
- CSSFrameCalRerouteBase
- CSSFrameCECalAddModify
- CSSFrameCEGridDay
- CSSFrameCEGridMonth
- CSSFrameCEGridWeek
- CSSFrameCEMultPart
- CSSFrameGanttActivity
- CSSFrameGanttActivityBusyFree
- CSSFrameListCommSrc
- CSSFramePopupCalAppt
- CSSFrameSRActivity
- CSSSWECalToDoFrameList
- CSSSWEFrameActHICalendar
- CSSSWEFrameAlarmListSch
- CSSSWEFrameGanttActivityFs
- CSSSWEFrameGanttHiMode
- CSSSWEFrameInMail
- CSSSWEFrameInMailBody

Business Component User Properties that can Reference the CSSBCActivity Class

The following topics describe business component user properties that can reference the CSSBCActivity class:

- *Adding Contacts to the Action Business Component*
- *Specifying the Manager That Sends Email*

- *Restricting How Siebel CRM Displays Private Activities for Primaries*

The following topics describe business component user properties that can reference the CSSBCActivity class. Each of these business component user properties is required:

- *Specifying the Status for In Progress Emails*
- *Specifying the Status for Sent Emails*
- *Specifying the Status for Unsent Outbound Emails*
- *Specifying the Status for Rejected Emails*

Methods that can Reference the CSSBCActivity Class

This topic describes the methods that can Reference the CSSBCActivity class. It includes the following topics:

- *ClearGridBeginEndDate Method*
- *CompleteActivity Method*
- *IsPrimaryInMvg Method*
- *SetEmployeeId mMethod*
- *SetGridBeginEndDate Method*

You can specify each method in the Method property of a class method. This class method is a child of the CSSBCActivity class. These methods are mostly defined for coding purposes. Calling a method directly requires analysis and testing.

ClearGridBeginEndDate Method

The ClearGridBeginEndDate method returns the business component to regular mode after the SetGridBeginEndDate method sets it to calendar mode. For more information, see *SetGridBeginEndDate Method*.

You can configure Siebel CRM to call the ClearGridBeginEndDate method from an applet, business component, or business service. You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from a custom command or external interface.

CompleteActivity Method

The CompleteActivity method saves the activity record and determines the costs associated with an activity. It then updates the parts, time, and expense records of the activity with the costs of each item according to the price list, rate list, and cost list.

Siebel CRM calls the Complete Activity business service when it saves an activity. This business service calls the CompleteActivity method. It typically uses this method with the Action business component. You can use it with other business components that reference the CSSBCActivity class.

If the applet is in query mode, then Siebel CRM cannot call this method.

You can configure Siebel CRM to call the CompleteActivity method from an applet, business component, or business service. You can configure Siebel CRM to call it from any item described in *Calling a Method* except from an external interface.

IsPrimaryInMvg Method

If the user is the primary in the multivalue group of a specified field, then the IsPrimaryInMvg method returns a value of Y. You can use this method to determine whether or not Siebel CRM allows the user to do operations that only the primary in the multi-value group can do. For example, only the primary can modify the primary.

You can configure Siebel CRM to call this method only from a server script or browser script that resides on an applet, business component, or business service.

The following table describes the arguments that you can use with the IsPrimaryInMvg method.

Argument	Description
fieldname	Specifies the name of the field that Siebel CRM examines.

SetEmployeeId mMethod

The SetEmployeeId method sets the criteria of the next SQL query that resides in the current activity business component to the row ID and login that Siebel CRM provides as input arguments. This configuration allows the user to view employee records in the calendar.

You can configure Siebel CRM to call this method only from a server script or browser script that resides on an applet, business component, or business service.

The following table describes the arguments that you can use with the SetEmployeeId method.

Argument	Description
emp_login_id	Specifies the row ID of the employee. Siebel CRM returns the calendar records for this employee.
emp_login_name	Specifies the login of the employee. Siebel CRM returns the calendar records for this employee.

SetGridBeginEndDate Method

The SetGridBeginEndDate method sets the business component to Calendar mode and sets the beginning and ending dates for the grid.

Siebel CRM requires this method in a script that manipulates the business component in Calendar mode, such as manipulating an instances of a recurring activity.



CAUTION: To avoid a performance problem, it is recommended that you set the date interval so that Siebel CRM does not return a large number of records. For example, no more than 1000 records. You typically set this interval to a month or a week.

You can configure Siebel CRM to call this method only from a server script or browser script that resides on an applet, business component, or business service.

The following table describes the arguments that you can use with the SetGridBeginEndDate method. Each argument uses the following format:

```
mm/dd/yyyy
```

Argument	Description
beginDate	Specifies the beginning date for the grid in the time zone that the object manager uses. Siebel CRM interprets the beginning time for this date as midnight at the beginning of the day.
endDate	Specifies the ending date for the grid. Siebel CRM interprets the ending time for this date as midnight at the end of the day.

You can use the *ClearGridBeginEndDate Method* method to modify the mode that the business component uses when it modifies the mode from Calendar mode to regular mode.

CSSBCActivityPlan Class

This topic describes the CSSBCActivityPlan class. It includes the following topics:

- *Dependencies and Limitations for the CSSBCActivity Class*
- *Business Component User Properties that can Reference the CSSBCActivity Class*
- *Methods that can Reference the CSSBCActivity Class*

The CSSBCActivityPlan class supports activity plans. It filters the template drop-down list in Activity Plans views. If the user creates a new activity in one of these views, then Siebel CRM displays activity templates in the template drop-down list. It only displays activity templates for the current context. For example, the Activity Plans view in the Service screen only displays the activity templates for service requests.

The CSSBCActivityPlan class is a specialized class. It is recommended that you do not use it with a typical business component. For more information, see *Using Specialized Classes*.

The *CSSBusComp Class* class is the parent of this class.

Business component user properties that Siebel CRM gets from *CSSBusComp Class* can reference the CSSBCActivityPlan class.

CSSBCContactSIS Class

This topic describes the CSSBCContactSIS class. It includes the following topics:

- *User Properties and Methods that You can Use with the CSSBCContactSIS Class*

The CSSBCContactSIS class supports contact functionality for the following applications:

- Siebel Life Sciences. This class supports the following items:
  - Scheduling

    - Displaying all and affiliated contacts
    - Updating position and join fields and making them editable
    - Setting the Last Call date to the later of the call dates for all positions when Siebel CRM merges contacts
- Siebel Automotive. This class supports the following items:
    - Calling new correspondence from buttons instead of the application menu bar.
    - Reassigning contacts and any related opportunities and activities.
    - Creating opportunities and sales steps if Siebel CRM creates a new record. For Siebel Dealer applications only.

This class uses the Pharma Professional Position business component. You must not configure Siebel CRM to deactivate this business component or remove any fields from it.

The *CSSBCUser Class* class is the parent of this class.

User Properties and Methods that You can Use with the CSSBCContactSIS Class

This topic describes user properties and methods that you can use with the CSSBCContactSIS class

User Properties That Can Reference the CSSBCContactSIS Class

The following topics describe business component user properties that can reference the CSSBCContactSIS class:

- *Specifying Reassignment in Siebel Automotive*
- *Specifying Positions in Siebel Automotive*
- *Specifying Reassignment in Siebel Automotive*
- *Specifying Reassignment in Siebel Automotive*
- *Enabling the Dispatch Board*
- *Specifying Opportunity Business Components in Siebel Automotive*
- *Specifying Position Join Fields for Siebel Life Sciences*

The following topics describe field user properties that can reference the CSSBCContactSIS class:

- *Specifying the Field That Stores the Account Id of a Contact*
- *Specifying the Field That Stores Parent Account IDs for Contacts*

Methods That the CSSBCContact SIS Class Can Reference

The CSSBCContactSIS class can reference the following methods:

- AffiliatedContacts. Display affiliated contacts.
- AllContacts. Display all contacts.

You can configure Siebel CRM to call these methods from any item described in *Calling a Method* except from an external interface.

You can specify each method in the Method property of a class method. This class method is a child of the CSSBCContactSIS class.

CSSBCFile Class

This topic describes the CSSBCFile class. It includes the following topics:

- *Dependencies and Limitations for the CSSBCFile Class*
- *Methods That the CSSBCFile Class Can Reference*

The CSSBCFile class supports file attachments and file replication. Siebel CRM uses it to transfer files to and from the Siebel File System.

The *CSSBCBase Class* class is the parent of this class.

Dependencies and Limitations for the CSSBCFile Class

The following information lists the fields that the CSSBCFile class requires. Prefix represents a unique prefix for the field name. For more information, see *Specifying Field Name Prefixes for File Attachment Business Components*.

Field Name	Value Type
PrefixDockStatus	BOOL
PrefixFileAutoUpdFlg	BOOL
PrefixFileDate	UTCDATETIME
PrefixFileDeferFlg	TEXT
PrefixFileDockReqFlg	BOOL
PrefixFileExt	TEXT
PrefixFileName	TEXT
PrefixFileRev	ID
PrefixFileSize	NUMBER
PrefixFileSrcPath	TEXT
PrefixFileSrcType	TEXT
PrefixFileDockStatFlg	BOOL

Methods That the CSSBCFile Class Can Reference

This topic describes the methods that the CSSBCFile class can reference. It includes the following topics:

- *CreateFile Method*
- *GetFile Method*
- *PutFile Method*
- *UpdateSrcFromLink Method*
- *Methods that the CSSBCBase Class can Reference*

You can specify each method in the Method property of a class method. This class method is a child of the CSSBCFile class.

Unless noted otherwise, each of these methods returns one of the following strings:

- Success. The operation succeeded.
- Error. The operation did not succeed.

CreateFile Method

The CreateFile method places a copy of an external file into the Siebel File System. It updates the relevant fields in the business component so that Siebel CRM can attach it to the current record. You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from a browser script.

The following table describes the arguments that you can use with the CreateFile method.

Argument	Description
srcFilePath	Specifies the path to the source file.
keyFieldName	Specifies the name of the PrefixFileName field that contains the name of the file in the Siebel File System. For example, the AcctsFileName field contains the name of the file for the Account Attachment business component.
keepLink	If Y, then Siebel CRM stores the link to the external file.
altSrcFileName	Optional. If the file name that Siebel CRM creates in the Siebel File System is different from the name of the source file that it uses to copy the file, then it uses the value that the altSrcFileName argument contains as an alternative name for the source file name.

DeleteFile Method

The DeleteFile method deletes a file that resides in the Siebel File System or an external file. You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from a browser script or external interface.

The following table describes the arguments that you can use with the DeleteFile method.

Argument	Description
fileName	Specifies the name of the file that Siebel CRM deletes, including the path to this file.
internal	Optional. Specifies that the file is an internal file. An internal file is a file that resides in the Siebel File System. You can use one of the following values: • True. The file is an internal file. • False. The file is not an internal file. If you do not specify the internal argument, then Siebel CRM assumes that the file is not an internal file.

GetFile Method

The GetFile method copies a file that resides in the Siebel File System that is attached to the current record into a temporary directory. It allows a user to view or edit a file attachment. It returns one of the following strings:

- Success, outFilePath. The operation succeeded. OutFilePath contains the path to the file that Siebel CRM copied to the temporary directory.
- Error. Siebel CRM did not copy the file to the temporary directory.
- OutOfDate. Siebel CRM did not copy the file to the temporary directory but this file is not the most recent version of the file. The most recent version of the file is not available in the File System.

The TmpDir parameter in the Siebel section of the .cfg file for the Siebel Business Application specifies the temporary directory.

You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from a browser script.

The following table describes arguments that you can use with the GetFile method.

Argument	Description
keyFieldName	Specifies the name of the PrefixFileName field that contains the name of the file in the Siebel File System. For example, the AcctsFileName field contains the name of the file for the Account Attachment business component.

PutFile Method

The PutFile method replaces a file in the Siebel File System that is attached to the current record with a copy of a file in a directory. It updates the relevant business component fields. You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from a browser script.

The following table describes the arguments that you can use with the PutFile method.

Argument	Description
fileName	Specifies the name of a file and the path to this file that Siebel CRM updates.

Argument	Description
keyFieldName	Specifies the name of the PrefixFileName field that contains the name of the file in the Siebel File System. For example, the AcctsFileName field contains the name of the file for the Account Attachment business component.

UpdateSrcFromLink Method

The UpdateSrcFromLink method replaces a file that resides in the Siebel File System that is attached to the current record. Siebel CRM replaces this file with an external file that is linked to the file that it replaces. If something modifies this external file, then it updates the file attachment. It updates the relevant business component fields. You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from a browser script.

The following table describes the arguments that you can use with the UpdateSrcFromLink method.

Argument	Description
keyFieldName	Specifies the name of the PrefixFileName field that contains the name of the file in the Siebel File System. For example, the AcctsFileName field contains the name of the file for the Account Attachment business component.

CSSBCFINOppty Class

This topic describes the CSSBCFINOppty class. It includes the following topics:

- *User Properties and Methods that You Can Use with the CSSBCFINOppty Class*

The CSSBCFINOppty class supports opportunities. You can use it to implement a specialized Opportunity business component that performs specialized behavior. For example:

- Use a search specification in the business component so that the user can view all Opportunities in the secure Admin view.
- Use Secured Opportunities so that only an associated Sales Rep can view these opportunities.

The Siebel Automotive application uses the CSSBCFINOppty class to enable Send Letter (CTRL+L) functionality directly from the business component.

The CSSBCFINOppty class requires the Name field that contains the name of the opportunity.

The *CSSBCOppty Class* class is the parent of this class.

User Properties and Methods that You Can Use with the CSSBCFINOppty Class

This topic describes user properties and methods that you can use with the CSSBCFINOppty class.

Business Component User Properties that Can Reference the CSSBCFINOppty class

The following topics describe business component user properties that can reference the CSSBCFINOppty class:

- *Specifying the Application Name*
- *Specifying Opportunity Sales Steps in Siebel Automotive*
- *Specifying the Sales Step Admin in Siebel Automotive*
- *Specifying the Sales Step Admin in Siebel Automotive*
- *Calculating Values When Writing Records*
- *Specifying Opportunity Sales Steps in Siebel Automotive*
- *Specifying Search Specifications for Nonsales Rep Views*
- *Specifying Values for New Opportunities in Siebel Automotive*
- *Specifying Values for Used Opportunities in Siebel Automotive*

Methods That the CSSBCFINOppty Class Can Reference

The CSSBCFINOppty class can reference the SetSecureAdminView method. If called on a business component, and if the current business component is in admin mode, then the SetSecureAdminView method configures the business component to use the Secured Admin view mode. This configuration removes the search specification from the business component. You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from an external interface.

You can specify this method in the Method property of a class method. This class method is a child of the CSSBCFINOppty class.

CSSBCFINSActivity Class

The CSSBCFINSActivity class supports activities that reside in Siebel Financial Services applications. Siebel CRM typically uses the Action business component to support activities. It is not typically necessary to create another Activity business component that requires the CSSBCFINSActivity class. Many dependencies exist on the field names, list of values, and user properties that this class uses.

The *CSSBCActivity Class* class is the parent of this class.

The following topics describe business component user properties that can reference the CSSBCFINSActivity class:

- *Setting the Primary Sales Rep as the Owner*
- *Setting the Current User as the Primary Contact*
- *Updating the Synchronization Status for Activities*
- *Specifying Activities to Synchronize for Siebel Mobile*
- *Identifying Business Components That Siebel Financial Services Uses*

For more information about the methods that the CSSBCFINSActivity class can reference, see *Methods that can Reference the CSSBCActivity Class*.

CSSBCForecast Class

This topic describes the CSSBCForecast class. It includes the following topics:

- *Dependencies and Limitations for Forecast Classes*
- *Business Component User Properties that Can Reference the CSSBCForecast Class*
- *Methods That the CSSBCForecast Class Can Reference*

The CSSBCForecast class supports forecasts. It can create, modify, display, or delete a forecast. It can associate a forecast that a subordinate person creates with the forecasts that a manager owns. It can roll up forecast numbers to the summary records and top level (highest level) forecasts. Analysis views, such as the My Forecast Analysis view or the Subordinates View, allow the user to add or delete a subordinate forecast from a manager forecast.

The SBCForecastBase class is the parent of this class.

The CSSBCForecast class is a specialized class. It is recommended that you do not use it with a typical business component. For more information, see *Using Specialized Classes*.

Dependencies and Limitations for Forecast Classes

The business components whose names begin with Forecast 2000 depend on each other and depend on revenue business components. If you modify one of these business components, then you must also modify any dependent business components. For example:

- If you modify the Forecast 2000 -- Forecast Item Detail business component, then you must modify the Forecast 2000 -- Forecast Item Detail Flat business component.
- Siebel CRM uses the Forecast 2000 -- Forecast Item DynCol business component to display the Forecast Details spreadsheet. Each record that resides in the Forecast Item DynCol business component corresponds to a row in the spreadsheet, and the child forecast details provide data for the dynamic columns, such as dates. For more information about the dynamic column user properties, see *Siebel Forecasting Guide* .
- Siebel CRM uses the Forecast 2000 -- Forecast Item Detail Flat business component to join the Forecast Item and Forecast Item Detail business components. It uses this join to create a flat view. The Forecast Item business component typically stores the nonnumeric properties that the child details can share. To support this configuration, you must add new fields and user properties that reference this field to these business components.
- If you add a field to a revenue business component, and if a forecast must include data from this field, then you must add a corresponding field to a forecast business component and you must add a column to the table that this forecast business component references.

Business Component User Properties that Can Reference the CSSBCForecast Class

The following topics describe business component user properties that can reference the CSSBCForecast class:

- *Specifying Client Timeouts for Forecasts*
- *Specifying Server Timeouts for Forecasts*

- *Specifying Sleep Time Between Forecast Save Attempts*
- *Specifying Search Specifications for Forecast Rollup*
- *Specifying Search Specifications for Forecasts*
- *Specifying Revenue Aggregation Fields*
- *Disallowing Users to Pick Dates in the Forecast Date Dialog Box*

The following topic describes a business component user property that can reference the CSSBCForecast class. It is required:

- *Specifying Business Components for Forecast Analysis*

Methods That the CSSBCForecast Class Can Reference

This topic describes the methods that the CSSBCForecast class can reference. It includes the following topics:

- *ForecastGenerate Method*
- *RollupForecast Method*

You can specify each method in the Method property of a class method. This class method is a child of the CSSBCForecast class.

ForecastGenerate Method

The ForecastGenerate method does the following:

- Creates the detail and summary records for a Forecast 2000 – Forecast record.
- Completes a forecast after Siebel CRM creates the record for the top level (highest level) forecast header.
- Queries for the correct revenue records, and then creates the detail records and summary records for the forecast.

Siebel CRM calls the ForecastGenerate method when it saves a new forecast.

You can configure Siebel CRM to call this method from any item described in *Calling a Method*.

Configuring Siebel CRM to Create Forecasts Immediately

Siebel CRM can create detail and summary records in one of the following ways when it initially saves a new forecast:

- Immediately. The user must wait while Siebel CRM creates the forecast, by default. To enable this behavior, the following system preference must be set to FALSE. This setting configures Siebel CRM to not use the Forecast Service Manager server component:

  Forecast: Use Server Task

- In the background. The user can continue using Siebel CRM while it creates the forecast. To enable this behavior:

  - The following system preference must be set to TRUE. This setting configures Siebel CRM to use the Forecast Service Manager server component.

    Forecast: Use Server Task

- The Forecast Service Manager server component that resides in the Forecast Service Management component group must be enabled. If it is disabled, then Siebel CRM does not create detail or summary records and it only creates the top level (highest level) forecast record.

If the WriteRecord method saves a new forecast header record, then Siebel CRM calls the ForecastGenerate method to create the detail and summary records. To configure Siebel CRM to create only the header record, you must write script outside of the WriteRecord method. This script must use an InvokeMethod that calls the SetWriteRecordsWithGenerate method, and it must use an input argument of N. If you use this configuration, then Siebel CRM does the following:

- Does not call the ForecastGenerate method when it saves a new record for any subsequent new forecast
- Does not create any detail or summary records unless the script calls the ForecastGenerate method at some later point

If your script uses an input argument of Y when it calls the SetWriteRecordsWithGenerate method, then Siebel CRM calls the ForecastGenerate method when it saves any subsequent new forecast.

Not calling the ForecastGenerate method when Siebel CRM saves a forecast is different from allowing the ForecastGenerate method to run in the background. If you are not required to enable or disable ForecastGenerate for different forecast scenarios, then it is possible that you will not write script that calls the Set Write RecordsWithGenerate method.

Arguments That You Can Use with the ForecastGenerate Method

The following table describes the arguments that you can use with the ForecastGenerate method.

Argument	Description
copyFcstId	Specifies the Forecast Row Id of the previous forecast that exists in the same series. If Siebel CRM copies a forecast to create a forecast from a previous forecast, then it includes the modifications that it makes to the detail records of the copied forecast. It includes these modifications in the new forecast. If the New button references this method, then you must set the copyFcstId argument to NULL.
bForce	If Y, and if this forecast already exists, then Siebel CRM recreates the forecast.
bAutoForecast	If Y, and if a subordinate forecast exists, then Siebel CRM associates this subordinate forecast with a manager forecast. You typically set this argument to Y.
bNeedRollup	You can use one of the following values: • Y. Create summary records for the forecast. You typically set this argument to Y. • N. D not create summary records for the forecast until the user manually chooses Rollup.
bImplicitCreateFcst	You can use one of the following values: • Y. Create any subordinate forecasts that are missing. • N. Disregard any subordinate forecasts that are missing. If a subordinate forecast is missing, then Siebel CRM displays a dialog box when it saves the new forecast. This dialog box asks the user if Siebel CRM must create any subordinate forecasts that are missing.

RollupForecast Method

The RollupForecast method creates the summary records for a forecast according to the detail records. Siebel CRM uses it to create the initial summary records when it creates a forecast. The Rollup button or a menu item on a forecast applet references the RollupForecast method or the RollupParentForecast method. Siebel CRM does not automatically update summary records. To update summary records after Siebel CRM modifies detail records, it must call the RollupForecast method through a control or programmatically. A current, active row must exist for the RollupForecast method. This row must exist in the forecast business component that resides at the top level (highest level). You can configure Siebel CRM to call this method from any item described in *Calling a Method*.

CSSBCForecastBase Class

This topic describes the CSSBCForecastBase class. It includes the following topics:

- *Methods That the CSSBCForecastBase Class Can Reference*

The CSSBCForecastBase is a base class. You can use it only as a parent class. The *CSSBCForecast Class* is one example of a subclass of the CSSBCForecastBase class. You can use the CSSBCForecastBase class to add or delete detail or summary records in a forecast.

The CSSBCAdjustable class is the parent of this class.

You must not configure Siebel CRM to create a business component that is an instance of the CSSBCForecastBase class.

For more information, see *Dependencies and Limitations for Forecast Classes*.

Methods That the CSSBCForecastBase Class Can Reference

This CSSBCForecastBase class can reference the RollupParentForecast method. This method determines the summary records that a forecast contains. If Siebel CRM modifies line item detail records, then it does not automatically determine summary records. The RollupParentForecast method does the same work as the *RollupForecast Method* with the following difference:

- Siebel CRM calls the RollupParentForecast method from a child business component that references the CSSBCForecast class.
- Siebel CRM calls the RollupForecast method directly from the business component that references the CSSBCForecast class.

You can configure Siebel CRM to call this method from any item described in *Calling a Method*.

You can specify this method in the Method property of a class method. This class method is a child of the CSSBCForecastBase class.

CSSBCForecastItem Class

The CSSBCForecastItem class stores the detail and summary records for a forecast. It stores data that is relevant to a forecast, such as opportunity, account, and revenue class. Siebel CRM uses records from one of the following classes:

- CSSBCForecastItem. Determines each row a spreadsheet contains that resides in a spreadsheet view.

- CSSBCForecastItemDetail. Determines the columns that a spreadsheet contains. For more information, see *CSSBCForecastItemDetail Class*.

You can only use the CSSBCForecastItem class to add or delete the detail and summary records that a forecast contains.

The CSSBCAdjustable class is the parent of this class.

The following topics describe business component user properties that can reference the CSSBCForecastItem class:

- *Specifying Pop-up Revenues Lists*
- *Specifying the Field That Siebel CRM Copies for New Revenue Forecasts*

For more information, see *Dependencies and Limitations for Forecast Classes*.

CSSBCForecastItemDetail Class

This topic describes the CSSBCForecastItemDetail class. It includes the following topics:

- *Methods That the CSSBCForecastItemDetail Class Can Reference*

The CSSBCForecastItemDetail class stores the detail and summary records for forecasts. Siebel CRM uses it with the *CSSBCForecastItem Class*. The CSSBCForecastItemDetail class stores data that is relevant to some aspects of the records. For example, quantity, price, and revenue. Many CSSBCForecastItemDetail records can exist for each CSSBCForecastItem record. Siebel CRM uses records of the following type:

- CSSBCForecastItem. Identifies each row of the spreadsheet that the spreadsheet view displays.
- CSSBCForecastItemDetail. Identifies each column of the spreadsheet that the spreadsheet view displays.

You can use the CSSBCForecastItemDetail class to add or delete detail records or summary records to or from a forecast. You must not use it for other reasons.

The CSSBCAdjustable class is the parent of this class.

The *Specifying the Field That Siebel CRM Copies for New Revenue Forecasts* business component user property can reference the CSSBCForecastItemDetail class.

For more information, see *Dependencies and Limitations for Forecast Classes*.

Methods That the CSSBCForecastItemDetail Class Can Reference

The CSSBCForecastItemDetail class can reference the following methods:

- AutoAdjust. Gets adjustments made to the previous forecast in the series and makes the same adjustment to the current selection of records.
- UpdateSelectionFromRevn. Updates a forecast detail record with data from the revenue record that Siebel CRM associates with the forecast detail record.
- UpdateSelectionToRevn. Updates the revenue record that Siebel CRM associates with the forecast detail record with data from this forecast detail record.

Siebel CRM calls these methods for an individual forecast detail record. It can use each method in a script that buttons and menu items reference from a forecast detail view. You can specify each method in the Method property of a class method. This class method is a child of the CSSBCForecastItemDetail class.

You can configure Siebel CRM to call this method from any item described in *Calling a Method*.

CSSBCFundReq Class

The CSSBCFundReq class supports fund requests. The Fund Request business component references the CSSBCFundReq class. It includes code that uses the Outbound Communications Manager business service that sends an email message.

If the following calculated fields in the Fund Request business component evaluate to Y according to a status modification, then Siebel CRM uses code that sends the mail message:

- Status Email Apr Rej
- Status Email Submit

The Fund Request business component uses specialized code that creates the email message text. An email template does not provide this text. You cannot configure this text.

The *CSSBCBase Class* class is the parent of this class.

Business component user properties that Siebel CRM gets from *CSSBCBase Class* can reference the CSSBCFundReq class. This configuration is true except for the following user property because of the specialized business component code that the CSSBCFundReq class uses:

```
Field Read Only Field: fieldname
```

For more information, see *Making Fields Read-Only*.

For more information about the methods that the CSSBCFundReq class can reference, see *Methods that the CSSBCBase Class can Reference*.

CSSBCOppty Class

The CSSBCOppty class supports opportunities. You can use it to call specialized opportunity behavior, such as estimating compensation.

The *CSSBCBase Class* class is the parent of this class.

The business component user property described in *Allowing Only the Primary to Modify Sales Methods for Opportunities* can reference the CSSBCOppty class.

For more information about the methods that the CSSBCOppty class can reference, see *Methods that the CSSBCBase Class can Reference*.

CSSBCOrderMgmtQuoteItem Class

The CSSBCOrderMgmtQuoteItem class supports quote line items that order management uses. The Quote Item business component references the CSSBCOrderMgmtQuoteItem class. It includes the Product field that includes multiple drop-down lists, including Product. The drop-down list field for Product is Name.

The CSSBCOrderMgmtQuoteItem class is a specialized class. It is recommended that you do not use it with a typical business component. For more information, see *Using Specialized Classes*.

For more information about quote line items and order management, see *Siebel Order Management Guide* and *Siebel eSales Administration Guide* .

The CSSBCOrderMgmtPriceableItem class is the parent of this class.

CAUTION: The Product pick map must occur last in the sequence of pick maps to make sure the pricing engine works correctly. The default sequence is 99.

CSSBCPharmaSpecializedAct Class

The CSSBCPharmaSpecializedAct class supports call reporting in Siebel Life Sciences. This class does following:

- Creates records in the S_ACT_EMP table for attendee calls.
- Determines time off according to business hours. Siebel CRM uses values that the User Preferences contain to determine the working hours for a user. If these User Preferences do not contain values, then Siebel CRM uses 9 AM to 5 PM.
- Makes sure that Siebel CRM synchronizes the Start Date, End Date, Duration, Planned, and Planned Completion fields. If the value in one of these fields is modified, then Siebel CRM determines the value that the calendar displays for activities.

You can use the CSSBCPharmaSpecializedAct class only with the Pharma business components in Siebel Life Sciences. Siebel CRM comes predefined with the business component names and field names hard coded in the class methods.

The CSSBCSubmitBusComp class is a specialized class. It is recommended that you do not use it with a typical business component. For more information, see *Using Specialized Classes*.

The CSSBCSubmitBusComp class is the parent of the CSSBCSubmitBusComp class.

The *Updating the Planned Field if the Start Date Field Is Modified* business component user property can reference the CSSBCPharmaSpecializedAct class.

CSSBCPosition Class

This topic describes the CSSBCPosition class. It includes the following topics:

- *Methods That the CSSBCPosition Class Can Reference*

The CSSBCPosition class supports positions in organizations. Siebel CRM uses the specialized business component code for positions in a transaction because it must update the position record in the base table and the denormalized hierarchy table in a transaction. To support this feature, Siebel CRM opens a dedicated database connection. You cannot prevent Siebel CRM from opening this connection. Siebel CRM does not use the default database connection that it typically uses to write records.

The specialized code resides in SqlWriteRecord method of the CSSBCPartyDenorm class. Organizations, groups, and divisions use CSSBCPartyDenorm and use this specialized code.

The *CSSBusComp Class* class is the parent of the CSSBCPosition class.

The CSSBCPosition class is a specialized class. It is recommended that you do not use it with a typical business component. For more information, see *Using Specialized Classes*.

Methods That the CSSBCPosition Class Can Reference

The CSSBCPosition class can reference the OnGenReportRelClicked method. This method rebuilds the denormalized relationships that exist in the S_PARTY_RPT_REL table so that the hierarchical view modes display the correct information. The OnGenReportRelClicked method removes all values from the S_PARTY_RPT_REL table. This method then examines each record that resides in the S_PARTY table so that it can recreate the denormalized hierarchical structure in the S_PARTY_RPT_REL table. This work creates a large number of transactions for a Siebel Remote user and regional nodes. For more information, see the topics about creating Siebel reporting relationships in *Siebel Database Upgrade Guide* and *Siebel Enterprise Integration Manager Administration Guide* .

You can configure Siebel CRM to call the OnGenReportRelClicked method from any item described in *Calling a Method* except from an external interface.

You can specify this method in the Method property of a class method. This class method is a child of the CSSBCPosition class.

CSSBCProposal Class

This topic describes the CSSBCPosition class. It includes the following topics:

- *Methods That the CSSBCProposal Class Can Reference*

The CSSBCProposal class supports proposals and presentations. It creates and copies proposals. It can create proposal content. It supports the Proposal Generation business service. The CSSBCProposal class requires the following fields:

- Name. Name of the Proposal record.
- Template Name. Name of the Proposal template.

The *CSSBCFile Class* class is the parent of this class.

Methods That the CSSBCProposal Class Can Reference

The CSSBCProposal class can reference the RequestAllFiles method. This method identifies proposals and literature files that Siebel CRM downloads to a Mobile Web Client. It examines the entire content structure of the current proposal, and then sets the File Dock Request Flag that resides in the template file and in the literature files that the section components specify. Siebel CRM downloads the proposal and literature files to the Mobile Web Client the next time the user synchronizes.

You can configure Siebel CRM to call this method from any item described in *Calling a Method* except from an external interface.

You can specify this method in the Method property of a class method. This class method is a child of the CSSBCProposal class.

CSSBCServiceRequest Class

This topic describes the CSSBCServiceRequest class. It includes the following topics:

- *Dependencies and Limitations*

The CSSBCServiceRequest class supports service requests. It supports special functionality that resides in the Service Request module that tracks service data, such as determining warranty coverage and calculating commit time. A service request uses a lifecycle that begins with an Open status and ends with a Closed status. The user updates this status. The state model can guide the user in setting this status.

The *CSSBCBase Class* class is the parent of this class.

The following topics describe business component user properties that can reference the CSSBCServiceRequest class:

- *Allowing Users to Update Closed Service Requests*
- *Setting the Field Created Date to the Saved Date*

For more information about the methods that the CSSBCServiceRequest class can reference, see *Methods that the CSSBCBase Class can Reference*.

Dependencies and Limitations

The Entitlement Verification and Commit Time business services depend on the fields and functionality that the Service Request module provides. The CSSBCEntitlement class and the CSSCommitTimeService class interact frequently with the CSSBCServiceRequest class.

Siebel CRM sets the contact as the recipient when it creates correspondence for a service request. To support this configuration, the Primary Contact Address Id field must be active in the Service Request business component.

The CSSBCServiceRequest class requires the Status field and Sub-Status field.

CSSBCTaskTransient Class

The CSSBCTaskTransient class supports transient data that Siebel CRM requires while a task UI instance runs. It filters a single record for the current context in a task UI and current business component. It runs a default query on the first Get or Set function, and then creates a new record if the Execute method returns no rows.

The *CSSBCTaskTransientBase Class* class is the parent of this class.

Siebel CRM uses the CSSBCTaskTransient class only to support a transient business component in a task UI. You must not use it for any other purpose. To access this class, you must use only the Transient BusComp new object wizard in Siebel Tools. For more information about transient business components, see *Siebel Business Process Framework: Task UI Guide* .

CSSBCTaskTransientBase Class

The CSSBCTaskTransientBase class supports a transient business component. It is similar to the CSSBCTaskTransient class except that it requires you to configure Siebel CRM to manage records. Siebel CRM does not use the CSSBCTaskTransientBase directly in Siebel Tools. It uses the CSSBCTaskTransient class. You must not use the CSSBCTaskTransientBase class for typical configuration purposes. You can use it only to support a transient business component. For more information, see *CSSBCTaskTransient Class*.

The *CSSBCBase Class* class is the parent of this class.

CSSBCUser Class

This topic describes the CSSBCUser class. It includes the following topics:

- *Guidelines for Using the CSSBCUser Class*

The CSSBCUser class supports users, employees, contacts, and personal contacts. It does the following:

- Creates and manages user records
- Integrates external security adapters
- Manages the Sync List for personal information manager (PIM) devices
- Manages personal contact information
- Manages other typical contact and employee tasks

The *CSSBCBase Class* class is the parent of this class.

The following topics describe business component user properties that can reference the CSSBCUser class:

- *Automatically Assigning Responsibilities to Users*
- *Making Sure the Current Employee Holds a Position*

For more information about the methods that the CSSBCUser class can reference, see *Methods that the CSSBCBase Class can Reference*.

Guidelines for Using the CSSBCUser Class

Siebel CRM uses the CSSBCUser class for business components that contain information about people. These business components use the S_PARTY table as the base table and the S_CONTACT table as the primary extension table. To enable this configuration, Siebel CRM sets the value of the Inner Join Extension Table 1 business component user property to S_CONTACT.

The records in these business components are contacts that Siebel CRM displays in contact views, including employees where sensitive data might exist. This situation is true except for personal contacts.

The CSSBCUser class includes integrated support for external authentication systems, such as LDAP (Lightweight Directory Access Protocol). You must do some customization to enable this configuration. After you enable external authentication, Siebel CRM propagates the users and passwords that it creates to the external authentication systems when it calls the WriteRecord method.

The CSSBCUser class requires the configurable constraint that the *Making Sure the Current Employee Holds a Position* topic describes. The business component configuration or the database layer contains other required fields. The following required business component fields store information about people:

- First Name
- Last Name
- Person UId

If Siebel CRM enters a value in the Login field, then the CSSBCUser class allows it to modify this value but not to leave the field empty.

5 User Properties

User Properties

This chapter describes user properties. It includes the following topics:

- *Overview of User Properties*
- *Alphabetic List of User Properties*
- *Application User Properties*
- *Applet User Properties*
- *Business Service User Properties*
- *Control User Properties*
- *Field User Properties*
- *Integration Component User Properties*
- *Integration Component Field User Properties*
- *Integration Object User Properties*
- *List Column User Properties*
- *View User Properties*

For information about business component user properties, see *Business Component User Properties*.

Overview of User Properties

This topic describes an overview of user properties. It includes the following topics:

- *How This Book Describes the User Property Format*
- *Numbering Instances of a User Property*

A user property is an object definition that Siebel CRM adds as a child to an applet, business component, control, field, or list column. It configures specialized behavior that the properties of the parent object cannot provide. The following object types include user properties:

- Applet
- Application
- Assignment
- Business Component
- Business Service
- Business Service Method Argument
- Control

- Field
- Integration Component
- Integration Component Field
- Integration Object
- List Column
- View
- Virtual Business Component

Oracle only supports user properties that this book describes. For information about a user property that is specific to a Siebel Business Application, see the guide for this application. For example, for a user property that is specific to Siebel Hospitality, see *Siebel Hospitality Guide* .

For important caution information, see *Using Specialized Classes*.

How This Book Describes the User Property Format

You can enter a text string in the Value property to define the value of a user property. Unless noted otherwise, this book describes the format that you must use in this user property. For example, to define the value for the following Activity SearchSpec user property, you must use parantheses to enclose every field name that you include in this search specification, and you must use quotes and parentheses:

```
[Status]= LookupValue('EVENT_STATUS', 'Open') AND [Class] = LookupValue('FS_ACTIVITY_CLASS',
'Sales Activity')
```

In the following example, to list multiple pairs of fields, you must enclose each pair in single quotes and use a comma to separate each pair:

```
Parent: 'Contact.Id', 'Service Request.Contact Id', 'Service
Agreement.Contact Person Id'
```

Note the following example:

```
"[FieldToCheck]", "[BusCompName]", "[MethodName]",
"[Condition]"
```

This example requires the following format:

- Square brackets ([]) must enclose each parameter.
- Double quotes (") must enclose each set of square brackets.
- A comma and a space must separate each parameter.

Many user properties can contain a value of TRUE or FALSE. In most situations, if a user property does not exist for an object, then Siebel CRM assumes a value of FALSE. For information about locating an object, and then examining the user property list to determine if a user property exists for an object, see *Viewing a Business Component User Property*.

Numbering Instances of a User Property

Siebel CRM can use some user properties on multiple instances of a single business component or applet. If more than one instance of this user property exists, then Siebel CRM runs each instance sequentially. It uses Name n, such as On Field Update Invoke 1, On Field Update Invoke 2, and so on to identify multiple instances of a user property. In most situations, if the business component or applet includes only one instance of the user property, then Siebel CRM does not require this number.

Example of Numbering Instances of a User Property

For example, the Asset Mgmt - Asset (Order Mgmt) business component includes the following user properties:

```
On Field Update Invoke "Product Name", "Asset Mgmt - Asset", "CopyXA"
On Field Update Invoke 1 "Product Name", "Asset Mgmt - Asset", "GeneratePartNumber"
On Field Update Invoke 2 "Product Name", "Asset Mgmt - Asset", "SaveCxProd"
On Field Update Invoke 3 "Quantity", "Asset Mgmt - Asset", "SetExtendedQuantity"
```

If Siebel CRM updates the Product Name field in the Asset Mgmt - Asset (Order Mgmt) business component, then it calls the following methods that the Asset Mgmt - Asset business component uses:

- CopyXA
- GeneratePartNumber
- SaveCxProd

If Siebel CRM updates the Quantity field in the Asset Mgmt - Asset (Order Mgmt) business component, then it calls the SetExtendedQuantity method that resides in the Asset Mgmt - Asset business component.

If you do not specify FieldToCheck, then Siebel CRM calls the CopyXA method in the Asset Mgmt - Asset business component when the user saves the record. For example:

```
On Field Update Invoke "", "Asset Mgmt - Asset", "CopyXA"
```

Guidelines for Numbering Instances of a User Property

If you configure Siebel CRM to create multiple instances of a user property, then it is recommended that you use the following guidelines:

- Number each instance.
- Use consecutive numbers. For example, use Deep Copy 8, and then Deep Copy 9.
- Do not include a gap between a number that is greater than 9.
- Do not append a number that includes more than two digits.

The following examples create unwanted results:

- You use On Field Update Invoke 10 but no instances exist that use numbers less than 10.
- You use Deep Copy 9 and Deep Copy 19 but no instances exist that are numbered sequentially between 9 and 19.
- You use Named Method 100.

For more information, see *How This Book Describes the User Property Format*.

Alphabetic List of User Properties

The following table includes an alphabetic list of the user properties that this chapter describes. For a list of business component user properties, see *Alphabetic List of Business Component User Properties*.

User Property	Topic
Affiliated Account Id Field	*Specifying the Field That Stores the Account Id of a Contact*

User Property	Topic
ApplicationContextType	*Specifying the Application That Creates Proposals*
AssocFieldName [Field Name]	*Specifying the Field Name for an MVG*
Association	*Specifying Association Business Components*
BAPIAdapterService	*Specifying the BAPIAdapterService*
BatchSize	*Specifying the BatchSize for SAP IDOCs*
CanInvokeMethod: MethodName	*Enabling Methods for Applets*
ClientBusinessServicen	*Calling Business Services from the Client*
Contact Relationship Type	*Specifying Relationships in Organization Charts*
DataSourceBuscompName	*Specifying the Parent Business Component*
Default Applet Method	*Specifying the Method That the Enter Key Calls*
DefaultAppletFocus	*Specifying the DefaultAppletFocus*
DefaultFocus	*Specifying the Default Applet Focus*
DefaultFocus_Edit	*Specifying the Default Applet Focus for Base, Edit,or Edit List Mode*
DefaultFocus_New	*Specifying the Default Applet Focus for New Mode*
DefaultFocus_Query	*Specifying the Default Applet Focus for Query Mode*
Disable Buscomp Hierarchy	*Disabling Hierarchies in List Applets*
DisableNewRecord	*Disabling New Record Creation*
DisableSearch	*Disabling Search on Text Fields or Unindexed Fields*
DisableSort	*Disabling Sort on Business Component Fields*
DisableSort	*Disabling Sort on List Columns*
Display Mask Char	*Masking Credit Card, Account, and Other Secure Data*

User Property	Topic
DocumentContextType	*Specifying Template Values for Proposals*
Drilldown Visibility	*Specifying Drilldown Visibility*
EnableStandardMethods	*Enabling Record Manipulation in Field Service and Task Views*
Encrypt Key Field	*Specifying the Field That Contains the Encryption Key*
Encrypt ReadOnly Field	*Setting an Encrypted Field to Read Only if Encryption Fails*
Encrypt Service Name	*Specifying the RC2 or AES Encryption Service*
Encrypt Source Field	*Specifying the Field That Contains Secure Data*
Encrypted	*Enabling Encryption on a Field*
FINS Query Mode Disabled Method n	*Disabling Methods for FINS Applets in Query Mode*
ForceActive	*Forcing Controls to Be Active*
ForceActive	*Forcing Fields That a List Column References to be Active*
Logical Message Type	*Specifying the IDOC Message Type for SAP*
Major Time Unit	*Specifying Gantt Chart Behavior*
Minor Time Unit	*Specifying Gantt Chart Behavior*
MVG	*Specifying MVG Business Components*
Named Method n	*Calling Methods from Applets*
NoDataHide	*Hiding Applets That Contain No Data*
NoDelete	*Preventing Siebel EAI From Deleting Records*
NoInsert	*Preventing Siebel EAI From Inserting Records*
NoUpdate	*Preventing Siebel EAI From Updating Fields*
OverrideViewCachen	*Disabling the View Cache*

User Property	Topic
Page	*Specifying the Goto Web Page*
Parent Id Field	*Specifying Field Names According to Parent Id*
PDQDisabledViewn	*Disabling Predefined Queries in Views*
Political Analysis Field	*Specifying Political Influence in Organization Charts*
PostInvokeMethod n	*Specifying the PostInvokeMethod*
PostMainViewData	*Saving Unsaved Data*
Required	*Making a Field Required*
Show Required n	*Making an Applet Control Required*
SleepTime	*Specifying the Time Out Interval for Receive Requests*
SubCompCanUpdate	*Updating Assets*
SubCompUpdate	*Cascading Asset Updates*
Text Length Override	*Setting the Field Text Length*
Url	*Specifying the Goto URL*
Use Literals For Like	*Using Literals Instead of Bind Variables*
UseExistsForSubQuery	*Specifying the SQL for EXISTS Search Specifications*
View	*Specifying the Goto View*
Visibility Type	*Specifying the Calendar Visibility Filter*
WebGotoPlayerErrorPage	*Specifying the Error Web Page for Smart Script*
WebGotoView	*Specifying the Finish or Cancel Web Page for Smart Script*
X-BC	*Specifying Gantt Chart Behavior*
X-Color Field	

User Property	Topic
X-Color LOV Name	
X-Color Map	
X-Date InvokeMethod	
X-Display Constraint Map	
X-Display Duration	
X-DrillDown Field	
X-End DateTime Field	
X-Join Field	
X-Join InvokeMethod	*Specifying Gantt Chart Behavior*
X-LOV Map	
X-Num Slots	
X-Num Tool Tips	
X-Sort Spec	
X-Start DateTime Field	
X-Tooltips 1	
X-Tooltips 2	
X-Tooltips n	
Y-BC	
Y-BC ViewSet Size	
Y-Constraint	
Y-DrillDown Field	

User Property	Topic
Y-DrillDown View	
Y-Join Field	
Y-Label	
Y-Legend	
Y-SortSpec	
Z-BC	
Z-Date InvokeMethod	
Z-End DateTime Field	
Z-Join Field	
Z-Join InvokeMethod	
Z-Start DateTime Field	

Application User Properties

This topic describes application user properties. It includes the following topics:

- *Calling Business Services from the Client*
- *Disabling Predefined Queries in Views*
- *Disabling the View Cache*

Siebel CRM sets some of the parameters that it set in the application configuration (.cfg) file prior to Siebel CRM version 8.0 differently. It now sets them as application user properties in Siebel Tools.

Calling Business Services from the Client

The ClientBusinessServicen user property calls a business service from a browser script. It must specify the name of the business service that a browser script calls. This value uses the following format:

```
ClientBusinessServicen
```

where:

- n is a sequential number. If you skip a number, then Siebel CRM cannot call this service from a browser script. For more information, see *Numbering Instances of a User Property*.

You can use this user property only with Siebel Browser Script.

If a browser script attempts to use this user property to call a business service that is not listed, then an error that is similar to the following error might occur at runtime:

```
Cannot get service: <name of service>.(SBL-UIF-00275)
```

Starting with Siebel CRM version 8.0, you no longer set this user property in the application .cfg file. You now set it as an application user property in Siebel Tools.

Disabling Predefined Queries in Views

The PDQDisabledViewn user property disables the Predefined Query (PDQ) dropdown list for a view. The value for this user property must include the name of the view where you must disable the Predefined Query (PDQ) dropdown list.

If you add this user property to a view, then Siebel CRM does not apply the PDQs in the dropdown list when it loads this view. The user can still choose the PDQs in the dropdown list, and then Siebel CRM applies these PDQs.

Starting with Siebel CRM version 8.0, you no longer set this user property in the application .cfg file. You now set it as an application user property in Siebel Tools.

Disabling the View Cache

The OverrideViewCachen user property disables caching for a view. The value for this user property must use the following format:

```
OverrideViewCachen
```

where:

- n is a sequential number between 0 and 99. For more information, see *Numbering Instances of a User Property*.

For example, to disable caching if Siebel CRM makes a dynamic modification to a view. For example, if it modifies a parameter or calls a toggle applet. Starting with Siebel CRM version 8.0, you no longer set this user property in the application .cfg file. You now set it as an application user property in Siebel Tools.

To disable the view cache

1. Open Siebel Tools.
2. In the Object Explorer, click Application.
3. In the Applications list, query the Name property for the Siebel Business Application that contains the view where you must disable the cache.
4. In the Object Explorer, click Application User Prop.
5. In the Application User Props list, create a new application user property using values from the following table.

Property	Value
Name	OverrideViewCache0 You can use OverrideViewCache1, OverrideViewCache2, and so on to disable the cache for more views.
Value	The name of the view where you must disable the cache.

6. Compile and test your modifications.

Applet User Properties

This topic describes applet user properties. It includes the following topics:

- *Calling Methods from Applets*
- *Disabling Hierarchies in List Applets*
- *Disabling Methods for FINS Applets in Query Mode*
- *Disabling New Record Creation*
- *Enabling Methods for Applets*
- *Enabling Record Manipulation in Field Service and Task Views*
- *Hiding Applets That Contain No Data*
- *Making an Applet Control Required*
- *Specifying Gantt Chart Behavior*
- *Specifying Template Values for Proposals*
- *Specifying Drilldown Visibility*
- *Specifying Field Names According to Parent Id*
- *Specifying Political Influence in Organization Charts*
- *Specifying the PostInvokeMethod*
- *Specifying Relationships in Organization Charts*
- *Specifying the Application That Creates Proposals*
- *Specifying the Calendar Visibility Filter*
- *Specifying the Default Applet Focus*
- *Specifying the Error Web Page for Smart Script*
- *Specifying the Finish or Cancel Web Page for Smart Script*
- *Specifying the Method That the Enter Key Calls*
- *Specifying the Parent Business Component*

Calling Methods from Applets

The Named Method n applet user property calls a business component or business service method, or sets a field value. You can use it instead of scripting. The value for this user property must include a value that depends on the following action that Siebel CRM must perform:

- You can use the following format to set a field value:

  ```
  "Name", "SET", "Field", "Expression"
  ```

  If Siebel CRM calls Name, then it uses Expression to set the value of Field.
- You can use the following format to call a business component method:

  ```
  "Name", "Action", "BusComp", "Method"
  ```

  If Siebel CRM calls Name, then it calls Method of the BusComp according to the Action. For a list of actions, see the table in *Actions That You Can Use with the Named Method n User Property for Applets*.
- You can use the following format to call a business service method:

  ```
  "Name", "Action", "BusComp", "Service", "Method"
  ```

  If Siebel CRM calls Name, then it calls Method from the Service business service of the BusComp business component according to Action. For a list of actions, see *Actions That You Can Use with the Named Method n User Property for Applets*.

It might be necessary for you to configure Siebel CRM to start an action in reply to a data modification. For example, if Siebel CRM creates, deletes, or updates a record. You can configure Siebel CRM to start the reply before or after it applies the date modification. You can use a user property to create this automated reply without creating a custom script.

You can use this applet user property with the following classes:

- CSSFrameBase
- CSSFrameListBase

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property* and *Calling Business Service Methods from Business Components*.

Format You Must Use with the Named Method n Applet User Property

You must enclose each item that you include in the value of this user property in double quotation marks. You must use a comma and a space to separate each item. If a value includes a hyphen or parenthesis, then you must enclose this value in another set of single quotation marks or two more sets of double quotation marks. For example, if Siebel CRM must send the O2 Repair - Create Notification workflow process as a value for a parameter, then you use the following format:

```
"'O2 Repair - Create Notification'"
```

or

```
"""O2
Repair - Create Notification"""
```

For more information, see *How This Book Describes the User Property Format*.

You can append more parameters to an expression. If you use a business service action, then Siebel CRM sends this expression as a property set. You must use a name and value pair instead of an array of strings. For example:

```
"NameExpr", "ValueExpr"
```

Calling Methods in a Specific Order

You can use the Named Method n applet user property to call methods in a specific order. For example, you can use it to update a legacy system with new account records after Siebel CRM creates a new account record. The following code saves the record in Siebel CRM, and then calls a workflow process that updates the legacy system:

```
Named Method 2: WriteRecord 'INVOKE', 'WriteRecord','INVOKESVC', 'Workflow Process Manager', 'Run Process',
 '"ProcessName"','"Account - New Order"', '"RowId"','[Id]'
```

Actions That You Can Use with the Named Method n User Property for Applets

The following table describes the actions that you can use with the Named Method n user property.

Action	Description	Method Type
INVOKE	Calls the method.	Business component
INVOKESEL	Saves the state and calls the method one time for each chosen record.	
INVOKEALL	Saves the state, requeries, and then calls the method one time for each record.	
INVOKESAVE	Saves the state, requeries, and then calls the method.	
INVOKESVC	Calls the method.	Business service
INVOKESVCSEL	Saves the state and calls the method one time for each chosen record.	
INVOKESVCALL	Saves the state, requeries, and then calls the method one time for each record.	
INVOKESVCSAVE	Saves the state, requeries, and then calls the method.	

Disabling Hierarchies in List Applets

The Disable Buscomp Hierarchy applet user property prevents Siebel CRM from displaying a hierarchical relationship in a list applet. The value for this user property must include a Boolean value. If TRUE, then Siebel CRM disables the business component hierarchy.

Siebel CRM uses a hierarchical list applet to display records that include a hierarchical relationship. To display this hierarchy in the client, it uses icons in the first column of this list applet. You can set the Hierarchy Parent Field property of the parent business component to use this hierarchy.

To disable this hierarchy, you can add this applet user property to the applet with the following values:

- Name. Disable Buscomp Hierarchy.
- Value: TRUE.

Siebel CRM uses this applet user property on predefined list applets, such as Asset Mgmt - Asset List Applet.

For more information, see the topic about specialized behavior that Web templates support in *Configuring Siebel Business Applications* .

Disabling Methods for FINS Applets in Query Mode

The FINS Query Mode Disabled Method n applet user property disables a method if the applet is in query mode. The value for this user property must include the name of a method.

You can use this applet user property with the CSSSWEFrameFINApplication class.

You can configure Siebel CRM to deactivate this user property or create a new instance of it. You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

Disabling New Record Creation

The DisableNewRecord applet user property prevents Siebel CRM from calling NewRecord in the current applet. The value for this user property must match the application name exactly.

If the application name is the same as the name of the Siebel Business Application that Siebel CRM is currently running, then Siebel CRM disables NewRecord on this applet. For example, if the Siebel Sales Enterprise application is currently running, then the following value disables NewRecord on this applet for this application:

```
Siebel Sales Enterprise
```

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Enabling Methods for Applets

The CanInvokeMethod: MethodName applet user property enables or disable a method or a button. It must include a value or an expression that returns one of the following values:

- TRUE. Siebel CRM enables the method.
- FALSE. Siebel CRM disables the method.

MethodName identifies the name of the method that this user property enables or disables.

For example, Siebel CRM uses the following values to disable the Copy Record method that resides in the Partner Product List Applet:

- Name. CanInvokeMethod: CopyRecord.
- Value. FALSE.

The following example uses an expression for the value in the SIS Account List Applet. It enables the copy record feature for accounts that include a status but disables it for all other accounts:

- Name. CanInvokeMethod: CopyRecord.
- Value. [Account Status] IS NOT NULL.

Siebel CRM disables the method that the button calls. You can do this declaratively at the applet level. It is easier to use than scripting PreCanInvokeMethod.

Siebel CRM uses this user property in the CSSFrame class, CSSFrameList class, and the subclasses of these classes.

You can configure Siebel CRM to deactivate this user property, modify the value for it, or if an instance of it is not already defined, then to create a new instance of it.

Enabling Record Manipulation in Field Service and Task Views

The EnableStandardMethods applet user property enables record manipulation operations in a field service or task view. The value for this user property must include one of the following values:

- Y. Enable record manipulation operations.
- N. Call this method only if the user does one of the following:
  - Right-clicks and opens an applet menu
  - Uses a shortcut

If you specify the EnableStandardMethods user property on an applet, then the user can use this applet to do record manipulation operations. For example, the user can run a query, advance the record pointer, edit multiple records, and so on.

You can use this applet user property with the following classes:

- CSSFrame
- CSSFrameList
- CSSSWEFrameShuttleBaseAssoc
- CSSSWEFrameShuttleBaseMvg

Hiding Applets That Contain No Data

The NoDataHide applet user property hides the applet if it contains no data. The value for this user property must include one of the following values:

- Y. If the applet contains no data, then hide it.
- N. If the applet contains no data, then do not hide it.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Making an Applet Control Required

The Show Required n applet user property requires a control on an applet. Siebel CRM makes sure that the field that this control references is required and resides on an applet. The value for this user property must specify the name of an applet control.

If you specify this user property, then the business component that the applet references must use the CSSBCUser class.

If the control that you specify does not reside in the applet, then the user cannot enter a value for the required control. For example, if you create an applet user property named Show Required 1 with a value of EmailAddress, then Siebel CRM requires the user to use the EmailAddress control in the applet.

You can configure Siebel CRM to deactivate this user property. If more than one instance of this user property exists, then Siebel CRM runs each instance sequentially. For more information, see *Numbering Instances of a User Property*.

Specifying Gantt Chart Behavior

The following table describes the applet user properties that Siebel CRM uses for the eGanttChart Busy Free Time Applet. To view the values that you can use for each of these user properties, locate the predefined eGanttChart Busy Free Time Applet in the Applets list in Siebel Tools, and then examine the Value property in the Applet User Properties list.

Applet User Property	Description
Major Time Unit	Specifies the major time unit in the X-axis of the Gantt chart. You can use one of the following values: • Day • Week • Month • Year
Minor Time Unit	Specifies the minor time unit in the X-axis of the Gantt chart. You can use one of the following values: • Hour • Day • Week • Month You can use the following combinations of major and minor time units: • Day, Hour • Week, Day • Month, Day • Month, Week • Year, Month

Applet User Property	Description
X-BC	Specifies the business component for the X-axis of the Gantt chart.
X-Color Field	Specifies the cells of the Gantt chart that Siebel CRM can color differently. This applet user property specifies the field in the X business component that determines the coloring. For the field that you choose, make sure a corresponding list of values exists. For more information, see the description for the X-Color LOV Name applet user property.
X-Color LOV Name	Specifies the list of values that defines the values of the field that you choose for the X-Color Field applet user property. From this list of values, you can specify the Language Independent Code (LIC) that Siebel CRM uses for the field value.
X-LOV Map	Specifies the Language Independent Code of the list of values that Siebel CRM can map to colors.
X-Color Map	Specifies the colors of the different values of the Language Independent Code. These values must use the same order that the values in the X-LOV Map applet user property uses. For example, 2-High maps to GanttChartBlue. The values of the X-Color Map applet user property are the style sheet classes that the Gantt.css defines.
X-Date InvokeMethod	Specifies to map to an internal X-business component method that determines the date-time range for the X-business component data. You must not modify this applet user property.
X-Display Constraint Map	Specifies the lower and upper bounds of the time that Siebel CRM displays in the Gantt chart instead of displaying a 24-hour interval. It applies only if the minor time unit is Hour.
X-Display Duration	Specifies the number of minutes to increment each cell in the Gantt chart.
X-DrillDown Field	Specifies the field in the X business component that Siebel CRM uses as the drill down field. A corresponding Drilldown Object must exist for the applet in Siebel Tools.
X-End DateTime Field	Specifies the field in the X business component that specifies the end of the date and time range.
X-Join Field	Specifies the field in the X business component that links it to the Y business component. If you do not specify the X-Join InvokeMethod applet user property, then Siebel CRM uses the value in the X-Join Field applet user property in a search specification.
X-Join InvokeMethod	Specifies how to map to an internal X business component method to link the Y and X business components. You must not modify this applet user property.
X-Num Slots	Specifies the number of slots for a cell. For example, assume multiple activities include the same start and end times. If X-Num Slots is 3, then Siebel CRM splits the cell that contains the time range into a maximum of three slots. These cells contain the conflicting activities.
X-Num Tool Tips	Specifies the number of tooltips that the applet contains. For example, assume that the following tooltip is the last tooltip that the applet defines: `X-Tooltip 12`

Applet User Property	Description
	In this example, you set the value of the X-Num Tool Tips applet user property to 12. If the applet does not contain an X-Tooltip n applet user property, then you set the value of the X-Num Tool Tips applet user property to 0 (zero).
X-Sort Spec	Specifies the sort specification for the X business component.
X-Start DateTime Field	Specifies the field in the X business component that contains the start for the date and time range.
X-Tooltips 1	Specifies the First control that Siebel CRM displays in the tooltip.
X-Tooltips 2	Specifies the Second control that Siebel CRM displays in the tooltip.
X-Tooltips n	You can define more applet user properties for more tooltip controls.
Y-BC	Specifies the business component that Siebel CRM uses for the Y-axis of the Gantt chart.
Y-BC ViewSet Size	Specifies the maximum number of records that the Y-axis can include.
Y-Constraint	Specifies the search specification for the Y business component in the base Gantt chart. Siebel CRM does not include any value for this user property, by default. If this user property does not include a value, then it uses a link in a parent and child relationship to constrain the Y business component.
Y-DrillDown Field	Specifies the source field that Siebel CRM uses for the Y drilldown.
Y-DrillDown View	Specifies the destination view of the Y drilldown. You can modify this user property.
Y-Join Field	Specifies the field in the Y business component that Siebel CRM uses to link this field to the X and Z business components.
Y-Label	Specifies the label for the Y-axis.
Y-Legend	Specifies a field in the Y business component that Siebel CRM displays in the Gantt chart.
Y-SortSpec	Specifies the sort specification for the Y business component.
Z-BC	Specifies the business component that determines the background that Siebel CRM draws for the Z-axis of the Gantt chart. For example, assume the working schedule of each employee is Monday through Friday, 8:00 AM to 5:00 PM. In this example, Siebel CRM uses a plain background where it displays the schedule and a colored background where it does not display the schedule. One of the following Z business components determines the display: • GanttStateNone. No schedule. • GanttStateOff. A schedule exists. • GanttStateOn. Color of the cell that the X-Color Map controls.

Applet User Property	Description
Z-Date InvokeMethod	Specifies how to map the internal Z business component method that determines the date and time range for the Z business component data. You must not modify this user property.
Z-End DateTime Field	Specifies the field in the Z business component that specifies the end of the date and time range.
Z-Join Field	Specifies the field in the Z business component that links to the Y business component. If the Z-Join InvokeMethod property does not include a value, then Siebel CRM uses the Z-Join Field property as a search specification.
Z-Join InvokeMethod	Specifies how to map an internal Z business component method to link the Y and Z business components with each other. You must not modify this user property.
Z-Start DateTime Field	Specifies the field in the Z business component that determines the start of the date and time range.

Specifying Template Values for Proposals

The DocumentContextType applet user property specifies the context of a proposal. The value for this user property must include a string that defines a proposal template category. This value must match exactly a value that the PROPOSAL_TEMPLATE_TYPE list of values contains.

If the value you specify matches a value in the PROPOSAL_TEMPLATE_TYPE list of values, then Siebel CRM uses the templates that include the same category value in this applet. It displays these values in the Template drop-down list. For example, the following value filters proposal templates so that Siebel CRM displays only some proposal templates in the Template drop-down list in this applet in the client:

```
Account Proposal
```

The Account Proposal that Siebel CRM defines for the Category field determines the templates that Siebel CRM displays.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying Drilldown Visibility

The Drilldown Visibility applet user property determines the visibility that Siebel CRM uses for a new view during a single record drill down. Earlier versions of Siebel CRM use this applet user property. The Visibility Type property of the drilldown object replaces this applet user property in later versions. For more information, see *Specifying the Calendar Visibility Filter*.

Specifying Field Names According to Parent Id

The Parent Id Field applet user property specifies the name of a field that resides in the current business component. For example, the PS Project Team OrgChart Applet specifies the Parent Team Member Id field that resides in the PS

Project Team business component. If the user relocates one box next to another box in an organization chart to create a parent and child relationship, then Siebel CRM populates this field with the parent row ID.

If you do not specify a field, then Siebel CRM uses the default value from the Manager Id field that resides in the Contact business component.

You can configure Siebel CRM to deactivate this user property, but not to modify the value for it or to create a new instance of it.

Specifying Political Influence in Organization Charts

The Political Analysis Field applet user property specifies the name of a field that resides in the current business component. Siebel CRM uses it in the organization chart to display the level of influence for each contact. It shades the box of the contact with the appropriate level of color.

If you do not specify a field, then Siebel CRM uses Political Analysis as the default value.

You can map this field only to a list of values that includes the following values:

- Low.
- Political Structure (Medium).
- Inner Circle (High).

You can configure Siebel CRM to modify this user property or modify the values for it, but not to deactivate it or create a new instance of it.

Specifying the PostInvokeMethod

The PostInvokeMethod n user property sets a value in some predefined applets. For example, the FINS FSW Service Request List Applet references the Service Request business component. It includes the following user property:

- Name. PostInvokeMethod 1
- Value. NewRecord:SetFieldValue:INS Product:[INS Product Predefault Calc]

If the user creates a new record in this applet, then this user property sets the INS Product field to the value that the INS Product Predefault Calc calculated field returns. In this example, it overrides the predefault value that Siebel CRM sets in the business component field.

Specifying Relationships in Organization Charts

The Contact Relationship Type applet user property specifies a list of relationship types that indicate the contact possesses a line of influence. The value for this user property must specify one or more relationship types. You can use a comma and a space to separate multiple relationship types. For example:

```
Influencer, TAS Influencer
```

The CONTACT_RELATIONSHIP_TYPE list of values typically provides these types.

If the user presses and holds down the CTRL key, and then moves one box in an organization chart and drops it on another box, then the value of this applet user property populates the RELATION_TYPE_CD column of the

S_CONTACT_REL table. This table is the intersection table that resides between the Contact and Contact Relationship business components. For example, if the user relocates Box A in an organization chart onto Box B, then:

- The CONTACT_ID column identifies the row ID of Box A.
- The REL_CONTACT_ID column identifies the row ID of Box B.

You can configure Siebel CRM to modify the values for this user property, but not to deactivate it or create a new instance of it.

For more information, see *How This Book Describes the User Property Format*.

Specifying the Application That Creates Proposals

The ApplicationContextType applet user property specifies the Microsoft application that Siebel CRM uses to create proposal and presentation documents. It must include one of the following values:

- MSWord. Use Microsoft Word for a proposal.
- MSPpt. Use Microsoft PowerPoint for a presentation.

You cannot configure Siebel CRM to deactivate this user property, modify the value for it, or create a new instance of it.

Specifying the Calendar Visibility Filter

The Visibility Type applet user property sets the visibility filter in a calendar applet. The value for this user property must include one of the following values:

- My. The Owner static drop-down list displays the name of the user who is logged in. This user can view only their personal calendar.
- My Direct Reports. The Owner static drop-down list displays the direct reports of the user who is logged in. This user can view the calendars for all people who report directly to this user. Siebel CRM typically uses this value in the eCalendar my direct reports applets.
- All. The user who is logged in can view the calendars of other people that Siebel CRM allows this user to access even if these other people are not direct reports.

Specifying the Default Applet Focus

The DefaultFocus applet user properties set the focus for a field or control that resides in an applet before a user interacts with this field or control. It can override this focus behavior as determined by the applet mode. An applet web template determines the modes that an applet can use.

You can configure Siebel CRM to deactivate each of these user properties, to modify the value for each them, or to create a new instance of each of them, but you must not configure Siebel CRM to create more than one instance of each them for an applet.

Setting the Default Focus for an Object That Siebel CRM Does Not Display

If you set the default focus to a field or control that Siebel CRM does not display in the visible portion of the client, then one of the following situations might occur. This behavior might confuse the user:

- The user might not be able to identify the object that is in focus.
- Siebel CRM might attempt to adjust the vertical position of the view so that it can display the field or control that is in focus.

Specifying the Default Applet Focus for Base, Edit,or Edit List Mode

The DefaultFocus_Edit applet user property sets the focus for a field or control in an applet if the applet is in Base, Edit, or Edit List mode. The value for this user property must include the name of a field or control that resides in the applet. You must not enclose this value with quotes. For example, you can use the following value to set the default focus for the Last Name field on an applet that is in Edit mode:

```
Last Name
```

If you do not add the DefaultFocus_Edit user property to an applet, and if the applet is in Base, Edit, or Edit List mode, then Siebel CRM does not set the focus on any field or control.

Specifying the Default Applet Focus for New Mode

The DefaultFocus_New applet user property sets the focus for a field or control that resides in an applet if the applet is in New mode. The value for this user property must include the name of a field or control that resides in the applet. You must not enclose this value with quotes. For example, you can use the following value to set the default focus to the New button on an applet that the user uses to add a new record:

```
NewRecord
```

If you do not add the DefaultFocus_New user property to an applet, and if the applet is in New mode, then Siebel CRM sets the focus on the first field in the applet.

Specifying the Default Applet Focus for Query Mode

The DefaultFocus_Query applet user property sets the focus for a field or control that resides in an applet if the applet is in Query mode. The value for this user property must include the name of a field or control that resides in the applet. You must not enclose this value with quotes. For example, you can use the following value to set the default focus for the First Name field on an applet that is in Query mode:

```
First Name
```

If you do not add the DefaultFocus_Query user property to an applet, and if this applet is in Query mode, then Siebel CRM sets the focus to the first field that it displays in this applet.

Specifying the Error Web Page for Smart Script

The WebGotoPlayerErrorPage applet user property specifies the name of the Web page that Siebel CRM displays if an error occurs while it runs a SmartScript in Siebel Consumer Marketing. This error page includes a control that returns navigation to the eSmartScript page that caused the error.

Specifying the Finish or Cancel Web Page for Smart Script

The WebGotoView applet user property specifies the name of the view that Siebel CRM displays if it calls the FINISH event or the CANCEL event in the Siebel SmartScript player applet.

Specifying the Method That the Enter Key Calls

The Default Applet Method user property specifies the method that Siebel CRM runs if the user presses the Enter key in an applet. The value for this user property must include the name of a method that Siebel CRM accesses from the applet.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. Only one instance can exist on each applet.

Specifying the Parent Business Component

The DataSourceBuscompName applet user property specifies the name of the business component that the business object references as the parent business component. It must specify the name of a business component that the current business object references.

If the Document Server receives a request to create a proposal or presentation, then it tries to restore the request context before it processes this request. It does this so that Siebel CRM positions the business component on the correct record set. The Proposal business component gets data from this business component according to the link specification. The first record is the record that the user used to submit the proposal request.

Note the following:

- It is typically not necessary to specify this applet user property because Siebel CRM defaults to the parent business component of the Proposal business component. This is typically the parent business component.
- You can specify this applet user property only if the parent business component that the current business object references is not the same as the parent business component of the Proposal business component.
- If you use this applet user property, then the link to the business component that the user property defines restricts the data that Siebel CRM gets from the business components instead of the default value of the parent of the proposal.
- You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it

Business Service User Properties

This topic describes business service user properties. It includes the following topics:

- *Specifying the BAPIAdapterService*
- *Specifying the BatchSize for SAP IDOCs*

- *Specifying the Time Out Interval for Receive Requests*

For information about using business component user properties to specify business services, see *Specifying Business Services*.

Specifying the BAPIAdapterService

The BAPIAdapterService business service user property specifies the name of the BAPI (Business Application Programming Interface) adapter business services. It must specify one of the following values:

- BAPI Adapter
- EAI
- SAP

Specifying the BatchSize for SAP IDOCs

The BatchSize business service user property specifies the number of IDOCs (Intermediate Documents) that Siebel CRM reads from SAP in a single call. The value for this user property must include an integer. The value you use depends on the resources that are available in your environment. A high value might degrade performance. The default value is 3000.

Specifying the Time Out Interval for Receive Requests

The SleepTime business service user property specifies the time out interval, in seconds, that Siebel CRM uses for a receive request. The value for this user property must include an integer. The default value is 20 seconds.

CAUTION: If you set the SleepTime user property to a low value or zero, then a serious negative impact on performance might result. It can cause SAP to flood the SAP system buffers and to retry sending IDOCs to Siebel CRM because the connector does not "receive" them.

Control User Properties

This topic describes control user properties. It includes the following topics:

- *Forcing Controls to Be Active*
- *Saving Unsaved Data*
- *Specifying the Goto URL*
- *Specifying the Goto View*
- *Specifying the Goto Web Page*

Forcing Controls to Be Active

The ForceActive control user property that resides on a control in a form applet forces the field that the control references to be active even if Siebel CRM does not display this field in the client. The value for this user property must include a Boolean value. If Y, then this field is active even if Siebel CRM does not display it in the client.

A field is typically active only if Siebel CRM displays it in the client. For more information, see *Forcing Fields That a List Column References to be Active*.

Saving Unsaved Data

The PostMainViewData control user property prevents Siebel CRM from losing unsaved data if a control calls a method that modifies the main view before Siebel CRM saves any new data that resides in the current record. The value for this user property must include one of the following values:

- TRUE. If the current record contains modified data, Siebel CRM saves the current record before the control modifies the focus.
- FALSE or this user property does not exist. Siebel CRM calls the control method and does not write unsaved data to the current record.

It is recommended that you set the PostMainViewData user property on each control that affects how Siebel CRM saves data, such as the Attach button. For example, if the All Service Requests view is the main view, then the user can click the Search button before Siebel CRM saves the current record. If the user runs a search, and then clicks the Attach button for a record, then Siebel CRM drills down on the Results list into the active record. This configuration modifies the applet that resides in the main view and Siebel CRM might lose the new data that resides in the unsaved service request.

You can configure Siebel CRM to deactivate this user property, modify the value for it, or if an instance of it is not already defined, then to create a new instance of it.

Specifying the Goto URL

The Url control user property specifies the URL that Siebel CRM uses when it calls the GotoUrl method for an applet control. If the value of the Method Invoked property on a control is GotoUrl, then you must use the Url control user property to specify the URL.

Siebel CRM typically uses the GotoUrl method with the CancelQuery control. It uses the following value for the Url:

```
JavaScript:history.back()
```

Specifying the Goto View

The View control user property specifies the name of the view that Siebel CRM displays when it calls the GotoView method for an applet control. For example:

```
Account List View
```

If the value of the Method Invoked property on a control is GotoView, then you must use the View control user property to specify the view.

Specifying the Goto Web Page

The Page control user property specifies the Web page that Siebel CRM displays when it calls the GotoPage method for an applet control.

If you set the Method Invoked property of a control to GotoPage, then you must use the Page control user property to specify the Web page.

Siebel CRM typically uses the GotoPage method with the Main Menu control, where the value of Page is SLWS Start Page.

Field User Properties

This topic describes field user properties. It includes the following topics:

- *Disabling Search on Text Fields or Unindexed Fields*
- *Disabling Sort on Business Component Fields*
- *Making a Field Required*
- *Setting the Field Text Length*
- *Specifying Encryption for Fields*
- *Updating Assets*
- *Cascading Asset Updates*
- *Specifying the Field That Stores the Account Id of a Contact*
- *Specifying the SQL for EXISTS Search Specifications*
- *Using Literals Instead of Bind Variables*

For information about using business component user properties to control fields, see *Controlling Fields*.

Disabling Search on Text Fields or Unindexed Fields

The DisableSearch field user property prevents the user or the Siebel query engine from running a query on a field that is not indexed or that is a text field. The value for this user property must include one of the following values:

- TRUE. Disable wildcard search on the field. For example, if the user enters the following value, then Siebel CRM displays an error message:

  ```
  [Name] LIKE 'S*'
  ```

  Siebel CRM does allow an exact search. For example, it allows the following search:

  ```
  [Name] = 'Siebel'
  ```

- FALSE or this user property does not exist. Allow wildcard or exact match search.

Siebel CRM enforces this user property in the following situations:

- Query by example
- Query Assistant
- Search Center
- Query started in a programmatic or message interface
- Predefined query

You can configure Siebel CRM to deactivate this user property, modify the value for it, or if an instance of it is not already defined, then to create a new instance of it.

Disabling Sort on Business Component Fields

The DisableSort field user property specifies whether a user can sort a result set on a business component field. It must include one of the following values:

- TRUE. Disable all sorting on any field in any applet that references the business component. Siebel CRM does the following:
  - Does not display the sort icons or tool tips in the list column header.
  - Does not display the field in the Advanced Sort window.
  - If a user attempts to sort on the Name field in any applet that references this business component, then Siebel CRM displays an error message.
- FALSE or this user property does not exist. Enable sort on the field.

You can configure Siebel CRM to deactivate this user property, modify the value for it, or if an instance of it is not already defined, then to create a new instance of it.

For more information, see *Disabling Sort on List Columns*.

Making a Field Required

The Required field user property makes the parent field a required field in some situations. The value for this user property must include a calculated expression. If Siebel CRM evaluates this expression to Y, then the field is required.

You can use this applet user property only with a business component that references the CSSBCBase class.

Setting the Field Text Length

The Text Length Override field user property configures Siebel CRM to use the text length of a field instead of the database column to determine the maximum field length. You can use this field user property only for a text field. The value for this user property must include text. If this user property:

- Exists. The Text Length property of this field determines the maximum field length regardless of the value that the user property contains. This situation is true even if the value is empty.
- Does not exist. The size of the database column determines the maximum field length.

Specifying Encryption for Fields

This topic describes user properties that handle encryption. It includes the following topics:

- *Overview of Encryption User Properties*
- *Upgrading Encryption*
- *Enabling Encryption on a Field*
- *Specifying the Field That Contains the Encryption Key*
- *Specifying the RC2 or AES Encryption Service*
- *Setting an Encrypted Field to Read Only if Encryption Fails*
- *Masking Credit Card, Account, and Other Secure Data*
- *Specifying the Field That Contains Secure Data*

Overview of Encryption User Properties

Siebel CRM comes predefined with the following business services that it uses to encrypt data fields according to RSA (Rivest Shamir Adleman) encryption:

- Advanced Encryption Standard (AES) Encryptor
- RC2 Encryptor

To encrypt a field, you set the encryption flag, identify the encryption service, and specify the encryption key. To disable encryption on a field, you set the Encrypted user property of the field to N.

If encryption is enabled, then Siebel CRM writes data to the field in the encrypted format and reads decrypted data from the field. Encryption must be enabled for each business component field that Siebel CRM maps to the same database column, and the user property specifications for these objects must be consistent.

Siebel CRM typically encrypts credit card number fields. However, it might be necessary for you to disable encryption in these fields in the following screens so that the user can view this information:

- Order Entry -- Orders
- Quote
- Agreements

For more information about setting up or upgrading encryption, see *Siebel Security Guide* . For more information about encryption keys and how to manage them, see *Siebel System Administration Guide* .

Upgrading Encryption

To do one of the following, you must run an upgrade script that modifies the encryption for the field:

- Use the RSA or AES encryptor service on a field that Siebel CRM previously did not encrypt or that the Standard Encryptor encrypted. Siebel CRM no longer supports Standard Encryptor.
- Use a stronger version of RC2 encryption than Siebel CRM previously used on the field.

For more information, see the upgrade guide for the operating system you are using.

Enabling Encryption on a Field

The Encrypted field user property specifies whether Siebel CRM encrypts a field. The value for this user property must include a Boolean value. If Y, then Siebel CRM enables encryption. To enable encryption on a field, you must set this field user property to Y and you must configure the Encrypt Service Name and Encrypt Key Field user properties. For more information, see *Siebel Security Guide* .

Specifying the Field That Contains the Encryption Key

The Encrypt Key Field field user property specifies the name of the business component field that contains the encryption key index. The keyfile.bin file in the following directory contains indexed encryption keys:

```
\Siebel_Root\Admin
```

The Encrypt Key Field user property specifies the business component field that contains the numbered encryption key index that Siebel CRM uses to decrypt the parent field.

For example, the Credit Card Number field that resides in the Quote business component is an encrypted field that contains credit card numbers. The Credit Card Number Key Index field contains the index of the encryption key that Siebel CRM uses to decrypt the Credit Card Number field. Siebel CRM sets the Credit Card Number field in the Encrypt Key Field user property to a value that the Credit Card Number Key Index contains.

Specifying the RC2 or AES Encryption Service

The Encrypt Service Name field user property specifies the encryption service name. It must specify one of the following values:

- RC2 Encryptor
- AES Encryptor

You can set this field user property on an encrypted field to specify the embedded encryption service that Siebel CRM applies.

Setting an Encrypted Field to Read Only if Encryption Fails

If decryption fails, then the Encrypt ReadOnly Field field user property sets an encrypted field to read-only. It must specify the name of a calculated business component field whose Calculated Value property is empty.

The calculated field that this field user property specifies determines whether Siebel CRM sets the data in the encrypted field to read-only. Preserving the data in read-only form allows someone to recover it later without modifying this data. This calculated field can use one of the following values:

- Y. Decryption fails on the encrypted field. Siebel CRM sets this encrypted field to read-only.
- N. Decryption succeeds on the encrypted field. Siebel CRM sets this encrypted field to readable.

For example, the Quote business component includes the encrypted Credit Card Number field. Siebel CRM sets the Encrypt ReadOnly Field user property for this field to the value that the Credit Card Number - Read Only calculated field contains.

Masking Credit Card, Account, and Other Secure Data

The Display Mask Char field user property displays a masked version of secure data, typically a credit card number or account number. The value for this user property must include a character that Siebel CRM uses to mask characters. Siebel CRM sets this value to x, by default.

Siebel CRM uses this field user property with the Encrypt Source Field user property to display only the last 4 digits of a credit card number or account number. For example, xxxxxxxxxxxx9999. You set this field user property on a separate

calculated field that Siebel CRM displays in the client instead of on the field that contains the entire credit card number or account number.

For example, Siebel CRM uses the Credit Card Number field in the Quote business component as the encrypted field that stores the credit card number. The properties of the Credit Card Number - Display calculated field include the following values:

- Display Mask Char. This user property contains x.
- Encrypt Source Field. This user property contains the following value. The applet field that displays the masked credit card number must reference the Credit Card Number - Display field:

  ```
  Credit Card Number
  ```

The field that the Encrypt Source Field property identifies must be encrypted. If it is not encrypted, then the masking functionality does not work.

For more information, see *Specifying the Field That Contains the Encryption Key*.

Specifying the Field That Contains Secure Data

The Encrypt Source Field field user property specifies the name of the business component field that contains an encrypted credit card number or account number. For more information, see *Masking Credit Card, Account, and Other Secure Data*.

Updating Assets

The SubCompCanUpdate field user property updates asset records. The value for this user property must include one of the following values:

- TRUE. Update any nonroot asset record.
- FALSE. Set asset records to read only.

For more information, see *Allowing Users to Update Assets* and *Cascading Asset Updates*.

Cascading Asset Updates

The SubCompUpdate field user property cascades modifications that occur to an asset record. It cascades these modifications to child asset records. The value for this user property must include one of the following values:

- TRUE. Cascade modifications to child asset records.
- FALSE. Do not cascade modifications.

Configuring Siebel CRM to Cascade Asset Updates

This topic describes how to configure Siebel CRM to cascade modifications that it makes to an asset record. The example in this topic describes how to configure Siebel CRM to cascade modifications that it makes to the Ship Date field that resides in the Asset Mgmt - Asset business component. It cascades these modifications to the Ship Date field that resides in the Asset Mgmt - Asset - SubCompUpdate Processing business component.

To configure Siebel CRM to cascade asset updates

1. Log in to Siebel Tools.
2. In the Object Explorer, click Business Component.
3. In the Business Components list, query the Name property for the following value:

   ```
   Asset Mgmt - Asset
   ```

4. In the Object Explorer, expand the Business Component tree, and then click Field.
5. In the Fields list, query the Name property for the following value:

   ```
   Ship Date
   ```

6. In the Object Explorer, expand the Field tree, and then click Field User Prop.
7. In the Field User Props list, create a new field user property using values from the following table.

Property	Value
Name	SubCompCanUpdate
Value	FALSE

8. In the Field User Props list, create a new field user property using values from the following table.

Property	Value
Name	SubCompUpdate
Value	TRUE

9. In the Object Explorer, click Business Component.
10. In the Business Components list, query the Name property for the following value:

    ```
    Asset Mgmt - Asset - SubCompUpdate Processing
    ```

11. In the Object Explorer, click Field.
12. In the Fields list, query the Name property for the following value:

    ```
    Ship Date
    ```

13. Set the following property using values from the following table.

Property	Value
Force Active	TRUE

Specifying the Field That Stores the Account Id of a Contact

The Affiliated Account Id Field user property specifies the name of the business component field that stores the account ID of affiliated contacts. Siebel Life Sciences applications use it to display affiliated contacts. If you do not define this field user property, then Siebel CRM searches for the Account Id field in the parent business component.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

For more information, see *Specifying the Field That Stores Parent Account IDs for Contacts*.

Specifying the SQL for EXISTS Search Specifications

The UseExistsForSubQuery field user property determines the type of SQL clause that Siebel CRM uses if it encounters an EXISTS search specification in a business component. If it encounters an EXISTS search specification, and if the value for this user property is:

- TRUE. Siebel CRM uses the SQL EXISTS clause.
- FALSE or this user property does not exist. Siebel CRM uses the SQL IN clause.

In some situations, using the SQL EXISTS clause instead of the IN clause can improve query performance, particularly for IBM DB2 390.

You can configure Siebel CRM to deactivate this user property, to modify the value for it, or to create a new instance of it, but no more than one instance for a single business component.

Using Literals Instead of Bind Variables

The Use Literals For Like field user property uses a literal instead of a bind variable as the criteria for a LIKE predicate in the SQL code that Siebel CRM uses to query a field. The value for this user property must include one of the following values:

- TRUE. Siebel CRM uses a literal instead of a bind variable. For example:

  ```
  LIKE "ABC%"
  ```

  where:

  - The % (percentage symbol) specifies the exact location of the wildcard.
  - FALSE or this field user property does not exist. Siebel CRM uses a bind variable. If a search string includes a wildcard, such as * or ?, then Siebel CRM creates the following predicate to represent this wildcard:

    ```
    LIKE ?
    ```

You can configure Siebel CRM to deactivate this user property, to modify the value for it, or to create a new instance of it, but no more than one instance for a single field.

Guidelines for Using Literals Instead of Bind Variables

CAUTION: Avoid or minimize using the Use Literals For Like field user property. It can use resources because it requires more SQL code parsing that can cause a package cache overflow. It is recommended that you use it only after testing indicates that a significant performance improvement will result.

Using the Use Literals For Like user property can impact performance when compared to using a bind variable for some searches. For example:

- A search string that includes a wildcard in a trailing position, such as "ABC*", can improve performance because Siebel CRM can choose a more appropriate index.
- A search string that includes a wildcard in a leading position, such as "*ABC", can degrade performance. The Use Literals For Like field user property does not improve performance for this search because it does not significantly reduce the number of rows that Siebel CRM must scan.

If you configure the Use Literals For Like field user property, then use the following guidelines:

- If poor performance exists, or if a DB2 UDB utility indicates that the optimizer does not choose indexes efficiently, then it is recommended that you use the Use Literals For Like field user property. If performance improves significantly, then deploy this configuration to your production environment.
- Do not use the Use Literals For Like field user property to improve performance with a case-insensitive query.
- Use a literal in a query that includes a LIKE predicate. This configuration can improve query performance on DB2 UDB. It provides information that the database optimizer can use to choose indexes for the query.

Integration Component User Properties

This topic describes integration component user properties. It includes the following topics:

- *Specifying Association Business Components*
- *Specifying MVG Business Components*
- *Preventing Siebel EAI From Deleting Records*
- *Preventing Siebel EAI From Inserting Records*

Specifying Association Business Components

The Association integration component user property indicates that the integration component is an association business component. The value for this user property must include a Boolean value. If Y, then the integration component is an association integration component.

Specifying MVG Business Components

The MVG integration component user property specifies that the integration component is a multivalue group business component. The value for this user property must include a Boolean value. If Y, then the integration component is a multivalue group business component.

Preventing Siebel EAI From Deleting Records

The NoDelete integration component user property restricts the Siebel EAI connector from performing a delete on the corresponding business component. The value for this user property must include a Boolean value. If Y, then the Siebel EAI connector does not perform deletes in the business component that the integration component references.

Preventing Siebel EAI From Inserting Records

The NoInsert integration component user property restricts the Siebel EAI connector from inserting on the corresponding business component. The value for this user property must include a Boolean value. If Y, then the Siebel EAI connector does not perform inserts in the business component that the integration component references.

Integration Component Field User Properties

This topic describes integration component field user properties. It includes the following topics:

- *Specifying the Field Name for an MVG*
- *Preventing Siebel EAI From Updating Fields*

Specifying the Field Name for an MVG

The AssocFieldName [Field Name] integration component field user property specifies the name of the business component field that Siebel CRM displays on the multivalue group business component.

Preventing Siebel EAI From Updating Fields

The NoUpdate integration component field user property restricts the Siebel EAI connector from updating the corresponding field. The value for this user property must include a Boolean value. If Y, then the Siebel EAI connector updates the field that the integration component field references.

Integration Object User Properties

This topic describes integration object user property. It includes the following topics:

- *Specifying the IDOC Message Type for SAP*

Specifying the IDOC Message Type for SAP

The Logical Message Type integration object user property specifies the logical message type that corresponds to the IDOC (Intermediate Document). The value for this user property must include a logical message type that corresponds to the IDOC. For example, DEBMAS or MATMAS. If you use this integration object user property with an SAP product, then the SAP Connector:

- Ignores it when it receives each IDOC from SAP.
- Uses the value that it contains to populate the control segment MESTYP field before it sends each IDOC to SAP.

List Column User Properties

This topic describes list column user properties. It includes the following topics:

- *Disabling Sort on List Columns*
- *Forcing Fields That a List Column References to be Active*

Disabling Sort on List Columns

The DisableSort list column user property specifies whether a user can sort a result set on a list column. It prevents the user and the Siebel query engine from sorting data that is not indexed. The value for this user property must include a Boolean value. If TRUE, then Siebel CRM does the following:

- Disables sort on the list column.
- Does not display the sort icons or tool tips in the list column header.
- Does not display the field in the Advanced Sort window.

For example, if you set the DisableSort user property of the Name list column to TRUE, then Siebel CRM does the following:

- Does not display the sort icons or Sortable tool tip in the Name list column.
- Does not display the Name field in the Advanced Sort window.
- If a user attempts to sort on the Name field, then it displays an error message. For more information, see *Disabling Sort on Business Component Fields*.

You can configure Siebel CRM to deactivate this user property, modify the value for it, or if an instance of it is not already defined, then to create a new instance of it.

Forcing Fields That a List Column References to be Active

The ForceActive list column user property forces the field that the list column references to be active even if Siebel CRM does not display it. A field is typically active only if Siebel CRM displays it in the client. The value for this user property must include a Boolean value. If Y, then the field is active even if Siebel CRM does not display it in the client. For more information, see *Forcing Controls to Be Active*.

View User Properties

This topic describes view user properties.It includes the following topics:

- *Specifying the DefaultAppletFocus*

Specifying the DefaultAppletFocus

The DefaultAppletFocus view user property identifies an applet in a view. Siebel CRM sets the focus to this applet before the user interacts with the view. This user property overrides the applet that receives the default focus.

The value for this user property must include the name of an applet that the view displays. You must not enclose this value in quotes. For example, Siebel CRM sets the value of the DefaultAppletFocus user property of the Account Screen Homepage View to the following value:

```
Account Home Search Virtual Form Applet
```

It sets the focus for this view to the Account Home Search Virtual Form Applet the first time the user accesses this view.

If the DefaultAppletFocus user property does not exist on a view, then the screen view determines the default focus. If the Type property of the screen view is:

- Detail View, and if the view includes more than one applet, then Siebel CRM places the focus on the second applet.
- Not Detail View, or if the view includes only one applet, then Siebel CRM places the focus on the first applet.

You can configure Siebel CRM to deactivate this user property, to modify the value for it, or to create a new instance of it, but no more than one instance for a single view.

For more information, see *Setting the Default Focus for an Object That Siebel CRM Does Not Display*.

6 Business Component User Properties

Business Component User Properties

This chapter describes business component user properties. It includes the following topics:

- *Alphabetic List of Business Component User Properties*
- *Viewing a Business Component User Property*
- *Controlling Siebel CRM Data*
- *Controlling Search and Sort*
- *Controlling Visibility Filters*
- *Controlling Records*
- *Controlling Fields*
- *Controlling Primaries*
- *Specifying Business Services*
- *Controlling Parent and Child Relationships*
- *Controlling Email*
- *Controlling Specific Siebel Business Applications*
- *Doing Other Work*

For brevity, this chapter uses the term user property to represent the term business component user property, unless noted otherwise. A business component is the parent of a business component user property.

Alphabetic List of Business Component User Properties

The following table includes an alphabetic list of business component user properties.

User Property	Topic
Active Field	*Making Fields Active*
Active Value	
Activity SearchSpec	*Specifying Search Specifications for the Action Business Component*
Admin Mode Field	*Allowing Administrators to Modify Records*
Admin NoDelete	*Preventing Administrators from Deleting Records*

User Property	Topic
Admin NoUpdate	*Preventing Administrators from Updating Records*
All Mode Sort	*Overriding Sort Specifications on Business Components*
Always Enable Child: buscompname	*Enabling Service Request Updates in Child Business Components*
Always Enable Field n	*Allowing Users to Update Closed Service Requests*
Application Name	*Specifying the Application Name*
Aspect BC NoInsert: Aspect	*Using Aspects to Control Read Only, Insert, and Other Behavior*
Aspect BC ReadOnly: Aspect	
Aspect Child BC ReadOnly: Aspect	
Aspect Default Value: Aspect	
Assignment Object	*Specifying Assignment Objects*
Associate: Completion Timeout	*Specifying Server Timeouts for Forecasts*
Associate: Completion Timeout (Client)	*Specifying Client Timeouts for Forecasts*
Associate: Sleep Time Between Attempts	*Specifying Sleep Time Between Forecast Save Attempts*
AutoPopulateResponsibility	*Automatically Assigning Responsibilities to Users*
BC eAuto Sales Step	*Specifying Opportunity Sales Steps in Siebel Automotive*
BC eAuto Sales Step Admin	*Specifying the Sales Step Admin in Siebel Automotive*
BC Opportunity	*Specifying Reassignment in Siebel Automotive*
BC Position	*Specifying Positions in Siebel Automotive*
BC Read Only Field	*Making Records Read-Only According to a Field Value*
BO eAuto Sales Step Admin	*Specifying the Sales Step Admin in Siebel Automotive*
Calc Actual OnWriteRecord	*Calculating Values When Writing Records*

User Property	Topic
ChargeBusinessService	*Determining Charges for Service Activities*
ChargeBusinessServiceMethodn	*Determining Charges for Service Activities*
CloseOutFlag	*Setting the CloseOut Flg Field*
Contact MVG PreDefault Expression	*Adding Contacts to the Action Business Component*
Contact-Activity BC Name	*Specifying Reassignment in Siebel Automotive*
Contact-Opportunity BC Name	*Specifying Reassignment in Siebel Automotive*
Copy Contact	*Copying Contacts to Campaigns*
Credit Card Expired Month	*Specifying Credit Card User Properties*
Credit Card Expired Year	
Credit Card Number	
Credit Card Type	
Credit Check	*Enabling Credit Check*
Credit Check Workflow	*Specifying the Workflow Process for Credit Check*
Currency Field n	*Modifying the Currency That a Field Uses*
Day Number: Arrival Date Field	*Specifying the Arrival Date Field for the Day Number Business Service*
Day Number: Function BC Name	*Specifying the Business Component for the Function Space*
Day Number: Room Block BC Name	*Specifying the Business Component for the Room Block*
DB2 Optimization Level	*Specifying the DB2 Optimization Level for SQL Statements*
Deep Copy	*Copying and Deleting Child and Grandchild Records*
Deep Copy/Delete Link Buscomp	
Deep Delete	

User Property	Topic
Default Aspect	*Using Aspects to Control Read Only, Insert, and Other Behavior*
Default Bookmark View	*Specifying the Default Bookmark View*
DefaultPrefix	*Specifying Field Name Prefixes for File Attachment Business Components*
Disable Automatic Trailing Wildcard Field List	*Disabling Automatic Trailing Wildcards in Queries*
DisplayType	*Overriding the Type for Fields That Users Read from Right-To-Left*
Duplicate Elimination	*Removing Duplicate Records From Queries*
Dynamic Hierarchy Parent Field Id	*Controlling Global Account Visibility*
DynHierarchy Hierarchy Id Field	
DynHierarchy Visibility Organization Id Field	
DynHierarchy Visibility Position Id Field	
eAuto Enable Create Sales Step	*Specifying Opportunity Sales Steps in Siebel Automotive*
Email Activity Accepted Status Code	*Specifying Statuses for Outgoing Email*
Email Activity New Status Code	
Email Activity Rejected Status Code	
Email Activity Sent Status Code	
Email Manager Compatibility Mode	*Specifying the Manager That Sends Email*
Employee Link	*Controlling My Visibility Filters*
Enable Dispatch Board	*Enabling the Dispatch Board*
Extended Quantity Field	*Extending Quote Quantities*
Field Read Only Field: fieldname	*Making Fields Read-Only*

User Property	Topic
FileMustExist	*Making Sure an Attachment File Exists*
Forecast Analysis BC	*Specifying Business Components for Forecast Analysis*
Forecast Rollup	*Specifying Search Specifications for Forecast Rollup*
Group Visibility	*Specifying Group Plus Team Visibility in Campaigns*
Group Visibility Only	*Specifying Group Only Visibility in Campaigns*
Inner Join Extension Table n	*Specifying Joins to the S_PARTY Table*
Maintain Master Account	*Maintaining the Master Account in Account Hierarchies*
Manager List Mode	*Controlling Manager Visibility Filters*
Master Account Field	*Specifying the Master Account Field*
MVG Set Primary Restricted: visibility_mvlink_name	*Specifying Who Can Modify Primary Team Members*
Named Method n	*Calling Business Service Methods from Business Components*
Named Search: Forecast Series Date Range	*Specifying Search Specifications for Forecasts*
No Change Field n	*Disabling Modifications to Saved Records*
No Clear Field n	*Disallowing Empty Fields*
NoDelete Field	*Disabling Field Deletion*
Non-SalesRep View Mode SearchSpec	*Specifying Search Specifications for Nonsales Rep Views*
On Condition Set Field Value	*Setting Field Values According to Conditions*
On Field Update Invoke n	*Calling Methods When Siebel CRM Updates Fields*
On Field Update Set n	*Updating Fields When Siebel CRM Updates Other Fields*
OnAddAssocUpdateParent: buscompname	*Updating the Parent Business Component if Siebel CRM Modifies Children*

User Property	Topic
Opportunity Name	*Specifying Opportunity Business Components in Siebel Automotive*
Parent Account Field	*Specifying the Field That Stores Parent Account IDs*
Parent Read Only Field	*Setting Business Components to Read-Only According to a Field Value*
Parent Read Only Field: buscompname	*Setting Business Components to Read-Only According to a Name*
ParentBC Account Id Field	*Specifying the Field That Stores Parent Account IDs for Contacts*
Picklist Pre Default Field n	*Setting Default Values for Fields That Use Drop-Down Lists*
Position Join Fields	*Specifying Position Join Fields for Siebel Life Sciences*
Post Default Created Date To Date Saved	*Setting the Field Created Date to the Saved Date*
Primary Position Modification	*Allowing Only the Primary to Modify Sales Methods for Opportunities*
Private Activity Search Spec	*Restricting How Siebel CRM Displays Private Activities for Primaries*
Protect Seed Data	*Protecting Seed Data*
PSP: Active	*Specifying Business Components for Product Selection and Pricing*
PSP: Buscomp Name	
PSP: Eligibility Fields	
PSP: Eligibility Group	
PSP: Eligibility Signal	
PSP: Enabled BO: busobjname	
PSP: Mode	
PSP: Prepick Groups	
PSP: Price Fields	
PSP: Price Signal	

User Property	Topic
QueryAssistantNumQueries	*Adding Search Criteria to the Query Assistant*
RBFields	*Specifying Room Types for Siebel Hospitality*
Recipient Email Address Field	*Sending Email Packages to Recipients*
Recipient Fax Address Field	
Recipient First Name Field	
Recipient Id Field n	
Recipient Last Name Field	
Recipient Preferred Medium Field	
Recursive Link	*Specifying Recursive Links Between Parent and Child Business Components*
Remote Source	*Specifying External Data Sources for Business Services*
Required Position MVField	*Making Sure the Current Employee Holds a Position*
Response Type Call Back	*Responding to Email or Web Offers*
Response Type More Info	
Response Type Unsubscribe	
Revenue Aggregation Field n	*Specifying Revenue Aggregation Fields*
Revenue Associate List	*Specifying Pop-up Revenues Lists*
Revenue Field Map: fieldname	*Specifying the Field That Siebel CRM Copies for New Revenue Forecasts*
Revision Condition n	*Enabling the Revise Button According to Conditions*
Revision Copy Field n	*Creating Numbered Revisions of Quotes, Orders, or Agreements*
Sequence Field	*Specifying Sequential Line Numbers for New Records*
Sequence Use Max	*Specifying Sequential Line Numbers for New Records According to Maximum Values*

User Property	Topic
Service Name	*Specifying Business Services for Virtual Business Components*
Service Parameters	*Specifying Business Service Parameters*
Set Primary Sales Rep As Owner	*Setting the Primary Sales Rep as the Owner*
Set User As Contact	*Setting the Current User as the Primary Contact*
Skip Existing Forecast Series Date	*Disallowing Users to Pick Dates in the Forecast Date Dialog Box*
Sort Field Map n	*Specifying How to Sort Predefined Queries for Opportunities*
Sort Search Optimization	*Optimizing Sort Searches*
State Model	*Specifying State Models*
SubCompUpdate On Save	*Allowing Users to Update Assets*
TargetProp n	*Saving Query Results in Target Lists*
TypeRetailNew	*Specifying Values for New Opportunities in Siebel Automotive*
TypeRetailUsed	*Specifying Values for Used Opportunities in Siebel Automotive*
Update Parent BC	*Specifying the Parent Business Component for Accounts*
Update Planned Field On Set: StartDate	*Updating the Planned Field if the Start Date Field Is Modified*
Update Status To Synchronized	*Updating the Synchronization Status for Activities*
Update Status To Synchronized Types	*Specifying Activities to Synchronize for Siebel Mobile*
Use Literals For Merge: table_name	*Using Literals Instead of Bind Variables When Merging Records*
Validate Parent Account	*Validating Parent Account IDs*
View Aspect	*Using Aspects to Control Read Only, Insert, and Other Behavior*
View Aspect 1	
View Aspect 2	

User Property	Topic
View Aspect: View Name	
ViewMode Sort: mode_num	*Sorting According to the View Mode That the Business Component Uses*
WorkFlow Behaviour	*Identifying Business Components That Siebel Financial Services Uses*

Viewing a Business Component User Property

This topic describes how to view a business component user property.

To view a business component user property

1. Open Siebel Tools.
2. Choose the View menu, and then click Options.

   Siebel Tools displays the Development Tools Options dialog box.
3. In the Object Explorer Hierarchy window, make sure the Business Component User Prop option contains a check mark, and then click OK.
4. In the Object Explorer, click Business Component.
5. In the Business Components list, locate the business component you must modify.

   For example, locate the Activity Plan business component.
6. In the Object Explorer, expand the Business Component tree, and then click Business Component User Prop.

   The Business Component User Properties list displays the user properties that exist for this business component.

Controlling Siebel CRM Data

This topic describes business component user properties that you can use to control Siebel CRM data. It includes the following topics:

- *Controlling Accounts*
- *Controlling Activities*
- *Controlling Revenues*
- *Controlling Campaigns*
- *Controlling Forecasts*
- *Allowing Users to Update Closed Service Requests*
- *Allowing Users to Update Assets*
- *Adding Contacts to the Action Business Component*

- *Creating Numbered Revisions of Quotes, Orders, or Agreements*
- *Extending Quote Quantities*
- *Automatically Assigning Responsibilities to Users*
- *Making Sure the Current Employee Holds a Position*
- *Setting the CloseOut Flg Field*
- *Specifying State Models*
- *Specifying Assignment Objects*
- *Protecting Seed Data*

Controlling Accounts

This topic describes business component user properties that you can use to control accounts.

Validating Parent Account IDs

The Validate Parent Account user property validates the parent account ID when Siebel CRM modifies an account hierarchy. It can contain one of the following values:

- Y. Validate the parent account ID.
- N. Do not validate the parent account ID.

It is recommended that you do not modify the default value of this user property. You cannot configure Siebel CRM to deactivate or create a new instance of this user property.

Specifying the Parent Business Component for Accounts

The Update Parent BC user property specifies the name of the parent business component that Siebel CRM updates when it updates an account hierarchy. The value of this user property must contain the name of an active business component.

You can configure Siebel CRM to deactivate this user property, to modify the value for it, but not to create a new instance of it.

Specifying the Field That Stores Parent Account IDs

The Parent Account Field user property specifies the name of the business component field that stores the parent account ID. The CSSBCAccountSIS class uses this value as the parent account ID for the record.

It is recommended that you do not modify the default value of this user property. You cannot deactivate or create a new instance of this user property.

Specifying the Field That Stores Parent Account IDs for Contacts

The ParentBC Account Id Field user property specifies the name of the field in the parent business component that stores the account ID that Siebel CRM uses to display affiliated contacts. For example:

```
Account ID
```

Siebel CRM uses this value in a Siebel Life Sciences application. If this user property does not exist, and if the user clicks the Affiliated Accounts button, then Siebel CRM creates an error.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying the Master Account Field

The Master Account Field user property specifies the name of the field that stores the master account ID. The value for this user property must contain the name of a business component field. The CSSBCAccountSIS class uses this value as the master account ID for the record.

It is recommended that you do not modify the value of this user property. You cannot deactivate or create a new instance of this user property.

Maintaining the Master Account in Account Hierarchies

The Maintain Master Account user property maintains the master account ID in an account hierarchy. The value for this user property must contain one of the following values:

- Y. Maintain the master account ID.
- N. Do not maintain the master account ID.

You cannot deactivate or create a new instance of this user property.

Controlling Activities

This topic describes business component user properties that you can use to control activities.

Determining Charges for Service Activities

The ChargeBusinessService user property specifies the name of the business service that Siebel CRM uses to determine charges for a service activity. You must not enclose this name in quotes. For example:

```
FS Service Charge
```

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying the Business Service Method for Activity Charges

The ChargeBusinessServiceMethodn user property specifies the name of the business service method that Siebel CRM uses to determine charges for a service activity. You must not enclose this name in quotes and it must identify a business service method that resides on the business service that the ChargeBusinessService user property specifies. For example, ChargeBusinessServiceMethod1 can contain a value of CreateServiceCharges. This value identifies a method of the FS Service Charge business service.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Updating the Synchronization Status for Activities

The Update Status To Synchronized user property sets the status of some activities to Synchronized during a mobile synchronization. It can contain one of the following values:

- Y. Modify the activity status to Synchronized.
- N or this user property does not exist. Do not modify the activity status to Synchronized.

The Update Status To Synchronized Types user property determines the types of activities that Siebel CRM updates.

An activity that includes the Status field set to Synchronized in a Siebel Industry Application is read-only in the Activities view.

Siebel CRM supports this user property in the CSSBCFINSActivity class but not subclasses of this class.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Controlling Revenues

This topic describes business component user properties that you can use to control revenues.

Specifying Revenue Aggregation Fields

The Revenue Aggregation Field n user property specifies the business component field that Siebel CRM rolls up into the summary record from the detail records. Details and summaries reside in the same business component. A summary record sums the values from one or more fields that reside in the detail records for the summary date range. The value of this user property must contain the name of a field that resides in the Forecast 2000 -- Forecast Item Detail business component. For example, if you use the following value, then Siebel CRM sums the Amount Revenue field from the detail records, and then stores this sum in the summary record:

```
Amount Revenue
```

You can configure Siebel CRM to deactivate this user property.

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

Specifying Pop-up Revenues Lists

The Revenue Associate List user property displays an association list if the user clicks New to create a new detail. The value for this user property is a Boolean value. If Y, and if the user clicks New to create a new detail, then Siebel CRM displays a pop-up list that lists revenues. The associated search specification for the current forecast series identifies the revenues that Siebel CRM displays. The user must associate one of these revenues with the forecast instead of adding free text data.

You define this user property on the Forecast 2000 -- Forecast Item business component.

You can configure Siebel CRM to modify the value for this user property, but not to deactivate it or to create a new instance of it.

Specifying the Field That Siebel CRM Copies for New Revenue Forecasts

The Revenue Field Map: fieldname user property specifies the field that Siebel CRM copies from the Revenue business component to one of the following business components. It copies this value if the user creates a detail in the Forecast Item business component:

- Forecast 2000 -- Forecast Item
- Forecast 2000 -- Forecast Item Detail

Note the following:

- The value of this user property must contain the name of a field that resides in the Revenue business component.
- The fieldname must identify the name of a field that resides in the Forecast 2000 -- Forecast Item business component.

For example, assume you define the user property that the following table describes. You define it on the Forecast 2000 -- Forecast Item business component. In this example, Siebel CRM copies the value of the Sales Rep Organization Id field of the Revenue business to the Organization Id field.

User Property	Value
Revenue Field Map: Organization Id	Sales Rep Organization Id

You can configure Siebel CRM to modify the value for this user property, create a new instance of it for each field that Siebel CRM must copy, or deactivate it.

Controlling Campaigns

This topic describes business component user properties that you can use to control campaigns.

Copying Contacts to Campaigns

The Copy Contact user property copies contact associations to a campaign if the user modifies the status of the campaign from Planned to Active. Siebel CRM uses this user property with the DBM Campaign business component. The value for this user property must contain a Boolean value. If TRUE, and if a user modifies the status of a campaign from Planned to Active, then Siebel CRM copies all of the contact associations for the planned campaign to the active campaign.

Specifying Group Only Visibility in Campaigns

The Group Visibility Only user property specifies that Siebel CRM use only group visibility in the campaign. The value for this user property must contain a Boolean value. If TRUE, then Siebel CRM uses only group visibility and you must set the Group Visibility user property to FALSE. Setting the Group Visibility user property to FALSE makes sure Siebel CRM deactivates the Buscomp View Mode user property so that it does not cause an inner join to the S_SRC_POSTN table.

Specifying Group Plus Team Visibility in Campaigns

The Group Visibility user property uses group plus team visibility in a campaign. The value for this user property must contain a Boolean value. If TRUE, then Siebel CRM uses group plus team visibility.

Controlling Forecasts

This topic describes business component user properties that you can use to control accounts. It includes the following topics:

- *Specifying Client Timeouts for Forecasts*
- *Specifying Server Timeouts for Forecasts*
- *Specifying Sleep Time Between Forecast Save Attempts*
- *Specifying Search Specifications for Forecasts*
- *Specifying Search Specifications for Forecast Rollup*
- *Specifying Business Components for Forecast Analysis*
- *Disallowing Users to Pick Dates in the Forecast Date Dialog Box*

Specifying Client Timeouts for Forecasts

The Associate: Completion Timeout (Client) user property specifies the maximum number of seconds that Siebel CRM waits on the client for a subordinate forecast to finish before it skips the association and creates an error. If Siebel CRM does not create the association, then the user can manually associate the subordinate forecast. Siebel CRM uses this user property in synchronous mode. The value for this user property must contain an integer that is greater than 0.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it. If you deactivate this user property, then Siebel CRM uses the default value.

Specifying Server Timeouts for Forecasts

The Associate: Completion Timeout user property for the server specifies the maximum number of seconds that Siebel CRM waits for the Siebel Server for a subordinate forecast to finish before it skips the association and creates an error. The description of the value that you use for this user property is the same as the description of the value that you use for the Associate: Completion Timeout user property for the client. For more information about this description, see *Specifying Client Timeouts for Forecasts*.

Specifying Sleep Time Between Forecast Save Attempts

The Associate: Sleep Time Between Attempts user property specifies the number of seconds that Siebel CRM waits after each attempt it makes to determine if a subordinate forecast is complete. The description for the value that you use is the same as the description for the Associate: Completion Timeout user property for the client. For more information, see *Specifying Client Timeouts for Forecasts*.

Specifying Search Specifications for Forecasts

The Named Search: Forecast Series Date Range user property specifies the search specification that Siebel CRM applies on the Revenue business component when it creates a forecast. It makes sure that the revenues that the search returns occur in the Forecast Date range, by default.

The value for this user property must contain a valid search specification. This search specification and the Auto and Assoc search specifications can use special variables that the Forecast Series and Forecast Series Date business components define. For example, consider the following default value of this user property:

```
[Date] >= '&FCST_DATE_LOWER_BOUND' and [Date] <= '&FCST_END_DATE'
```

This search specification returns the values that exist between the Date - Lower Bound field and the End Date field of the Forecast 2000 -- Forecast Series Date business component. In this situation, the &FCST_DATE_LOWER_BOUND variable represents the Date - Lower Bound field. If this field:

- Contains a value. Siebel CRM sets the value of the History View Date to the value that the Date - Lower Bound field contains.
- Does not contain a value. If the History Edit field:

- Contains a value. Siebel CRM sets the Date - Lower Bound field to the value that the History Edit field contains.
- Does not contain a value. Siebel CRM sets the Date - Lower Bound field to the value that the Start Date contains.

You can configure Siebel CRM to deactivate this user property or modify the value for it. If you deactivate it, then you must make sure that the Siebel CRM limits the revenues in the forecast according to date. To do this, you can modify the Auto and Assoc search specifications of the Forecast Series. You cannot configure Siebel CRM to create a new instance of this user property.

For more information, see *How This Book Describes the User Property Format*.

Specifying Search Specifications for Forecast Rollup

The Forecast Rollup user property contains a search specification that Siebel CRM applies to the Forecast Detail business component during a forecast rollup. Siebel CRM rolls up only the detail records that satisfy the search specification. It rolls up these records into the summary record. The value for this user property must contain a valid search specification.

For example, the following search specification returns forecast details that the current user owns. It also returns any subordinate records that exist that Siebel CRM rolls into this forecast:

```
[Link Type] = LookupValue('FCST_FCSTITEM_LINK_TYPE','Own Item')
OR [Link Type] = LookupValue('FCST_FCSTITEM_LINK_TYPE','Item')
```

To restrict this search specification according to a series, you can use the Forecast 2000 -- Forecast Series business component.

It is recommended that you do not modify the value of this user property for a predefined business component that Siebel CRM uses for forecasting.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

For more information, see *How This Book Describes the User Property Format*.

Specifying Business Components for Forecast Analysis

The Forecast Analysis BC user property specifies the name of the business component that provides the records that Siebel CRM displays in the lower applet of a forecast analysis view. This type of view allows the user to choose multiple forecasts, and then to view an aggregate summary of records in a lower applet. The value for this user property must contain the name of a business component. For example:

```
Forecast 2000 – Forecast Item Detail Flat
```

It is recommended that you do not modify the value of this user property for a predefined business component that Siebel CRM uses for forecasting.

You can configure Siebel CRM to modify the values for this user property, but not to deactivate it or create a new instance of it.

Disallowing Users to Pick Dates in the Forecast Date Dialog Box

The Skip Existing Forecast Series Date user property configures Siebel CRM to not allow the user to pick a date in the Forecast Date dialog box in a Forecast view. It applies this restriction only if a forecast already exists for the current user for the current date. It can contain one of the following values:

- Y. Do not display the date. The user cannot pick another date.
- N. Display the date and allow the user to pick it.

You can configure Siebel CRM to modify the value for this user property, but not to deactivate it or to create a new instance of it.

Allowing Users to Update Closed Service Requests

The Always Enable Field n user property updates the fields that reside in a closed service request. It must contain the name of the field that Siebel CRM must update.

If a user sets the Status field on a service request to Closed, then Siebel CRM sets the Sub-Status field to Resolved and makes the record read-only except for the Status and Sub-Status fields. The CSSBCServiceRequest specialized business component class controls this behavior. For important caution information, see *Using Specialized Classes*.

If the business component includes:

- One instance of this user property. This instance must not include the numeric suffix.
- More than one instance of this user property:
  - The first instance must not include the numeric suffix.
  - Subsequent instances must include the numeric suffix, numbered sequentially.

    You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

You can configure Siebel CRM to deactivate this user property, modify the values for it, or to create a new instance of it.

Allowing Users to Update Assets

The SubCompUpdate On Save user property specifies whether the user can update an asset record. It can contain one of the following values:

- TRUE. The user can update an asset record.
- FALSE. The user cannot update an asset record and Siebel CRM disables any SubCompCanUpdate and SubCompUpdate field user properties that exist on fields that the business component contains. For more information, see *Updating Assets* and *Cascading Asset Updates*.

Adding Contacts to the Action Business Component

The Contact MVG PreDefault Expression user property identifies the predefault contact record that Siebel CRM adds to the Contact multivalue field of the Action business component. The value for this user property must use the following format:

```
Parent: 'Contact.Id', 'Service Request.Contact Id', 'Service Agreement.Contact Person Id'
```

For more information, see *How This Book Describes the User Property Format*.

Siebel CRM supports this user property for business components that reference a CSSBCActivity class, such as CSSBCFINSActivity. The business component where you add this user property must include a multivalue field named Contact Id or Contact Id (Thin).

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Creating Numbered Revisions of Quotes, Orders, or Agreements

The Revision Copy Field n user property and Revision Field property creates a numbered revision of a quote, order, agreement, and so on. If the user clicks Revise to create a new record as a copy of the current record, then this user property copies the value that resides in a field of the current record to the new record. Note the following:

- This user property must contain the name of a business component field.
- You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.
- You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

For more information, *Revise Method*.

In the following example, you use the Revision Copy Field and Revision Field user properties to create an updated revision of a quote.

To create numbered revisions of quotes, orders, or agreements

1. Open the Business Component User Properties list for the Quote business component.

   For more information, see *Viewing a Business Component User Property*.
2. Add a user property using values from the following table.

Property	Value
Revision Copy Field 1	Quote Number

3. Add a user property using values from the following table.

Property	Value
Revision Copy Field 2	Credit Card Number

4. Add a user property using values from the following table.

Property	Value
Revision Field	Revision

5. Compile your modifications.
6. Open the client, and then use the Revise button to create a new quote.

   The Revision field contains the next number that occurs in the revision sequence. This number is one more than the maximum number that the current record contains. The Quote Number and Credit Card Number fields contain the same values that the current record contains.

Extending Quote Quantities

The Extended Quantity Field user property defines the line item business component that Siebel CRM uses for a quote. For example, Quote Item. The value for this user property must contain the field name for the Extended Quantity in the line item. For example:

```
Extended Quantity Requested
```

You can configure Siebel CRM to modify the value for this user property, but not to deactivate it or create a new instance of it.

Automatically Assigning Responsibilities to Users

The AutoPopulateResponsibility user property associates a responsibility with a new user when Siebel CRM creates a record. It must contain a Boolean value. If TRUE, then Siebel CRM associates a responsibility with a new user when it creates a record. The New Responsibility field for the current user identifies this responsibility. Note the following:

- This user property requires that the responsibility multivalue field is named Responsibility.
- If Siebel CRM uses the business component in the EAI or Siebel Adapter context, then it ignores this user property.
- You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Making Sure the Current Employee Holds a Position

The Required Position MVField user property modifies the behavior of the WriteRecord method to require that the current employee must hold at least one position. The value for this user property must use the following format:

```
"[employee_flag]", "[position multivalue field]"
```

where:

- employee flag identifies the employee flag field that references the EMP_FLG column of the S_CONTACT table.
- position multivalue field identifies the multivalue field that contains the positions that the employee holds. You must make sure that the relationship that this multivalue field uses references the S_PARTY_PER table. You must not use the relationship that Siebel CRM uses with the positions that reference the employee or contact record that references the S_POSTN_CON table.

The code that Siebel CRM runs during a WriteRecord event determines whether it sets the value of the Employee Flag to Y:

- If it is Y, and if a position is associated with the current employee record, then no error occurs.
- If it is not Y, or if a position is not associated with the current employee record, then the WriteRecord event does not start and Siebel CRM creates an error.

If the EAI or Siebel Adapter context uses the business component, then Siebel CRM ignores this user property.

You can use this user property only with a business component that stores employee information.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

For more information, see *How This Book Describes the User Property Format*.

Setting the CloseOut Flg Field

The CloseOutFlag user property specifies the value of the CloseOut Flg field for the parent business component. It must contain a Boolean value of Y or N. You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying State Models

The State Model user property adds a business component to the business components that a multi-value group applet displays. This applet resides in the State Model business component. The value for this user property must contain a Boolean value. If Y, then Siebel CRM adds the business component where you define this user property to the multi-value group applet. For more information about the State Model, see *Siebel Applications Administration Guide* .

Specifying Assignment Objects

The Assignment Object user property identifies the assignment object that Siebel CRM uses when it sets the Assignment Object Name (AsgnObjectName) parameter of the Assignment Manager server component when it runs an

interactive assignment. The value for this user property must contain the name of an assignment object that is a child of a workflow policy object. You must enclose this assignment object in quotes.

For example, the Activity List View references the Action business component. If you set the Assignment Object user property on the Action business component to Activity, and if the user chooses Assign from the Tools menu while the user is in a child form applet in the Activity List View, then Siebel CRM adds the activity instead of some other object to the Assignment Manager queue for reassignment to a new owner.

You can configure Siebel CRM to deactivate this user property only if you disable interactive assignment, and only if you also remove any related controls from the client. You can configure Siebel CRM to modify the values for this user property, but not to create a new instance of it.

Protecting Seed Data

The Protect Seed Data user property prevents Siebel CRM from modifying seed data records of a business component. You can set it to one of the following values:

- Y. The user cannot modify or delete seed data records.
- N. The user can modify or delete seed data records.

For example, if you add this user property with a value of Y to the Responsibility business component, then the user cannot modify or delete any seed data responsibility record that starts with zero (0).

You can start the client in one of the following ways to override this user property:

- Append the following parameter to the command line that opens Siebel CRM, as defined in the properties dialog box for Siebel CRM shortcut in Windows:

  ```
  /editseeddata
  ```

- Append the following parameter to the UNIX command line that opens Siebel CRM:

  ```
  /editseeddata
  ```

You can configure Siebel CRM to create a new instance of this user property, but not to modify the value for it or deactivate it.

Controlling Search and Sort

This topic describes business component user properties that you can use to control search and sort. It includes the following topics:

- *Optimizing Sort Searches*
- *Removing Duplicate Records From Queries*
- *Overriding Sort Specifications on Business Components*
- *Sorting According to the View Mode That the Business Component Uses*
- *Disabling Automatic Trailing Wildcards in Queries*
- *Adding Search Criteria to the Query Assistant*

- *Saving Query Results in Target Lists*
- *Specifying How to Sort Predefined Queries for Opportunities*
- *Specifying Search Specifications for the Action Business Component*
- *Specifying Search Specifications for Nonsales Rep Views*

Optimizing Sort Searches

The Sort Search Optimization user property helps a database work with a rules-based optimizer (RBO). You can set it to one of the following values:

- TRUE. Enable sort search optimization.
- FALSE. Disable sort search optimization.

The Sort Search Optimization user property chooses an index from multiple indexes. To do this, it adds a search term to the SQL statement that does not modify the search result but that provides the rules-based optimizer with more information to help it choose the correct index. The Sort Search Optimization user property sets the column in this search term to the first column of the sort specification. For example, assume a query includes the following sort:

```
ORDER BY

NAME, START_DT
```

In this example, the Sort Search Optimization user property adds the following search term to the SQL statement:

```
NAME >= '\1'
```

where:

- `'\1'`

  represents the ASCII 0 character.

Searching for values that are greater than ASCII 0 does not remove any information from the search result, but this search term helps the optimizer to choose the most effective index. This configuration improves the query performance when the business component specifies a sort specification and if the optimizer fails to choose the correct index. This access requires Sales Rep or Organization visibility, because All or All Across Organization visibility typically overrides sort specifications.

The Sort Search Optimization user property works only with Oracle 8 databases or with Oracle 9i databases that support a rules-based optimizer. It does not work with cost-based optimizers. Siebel CRM does not support it starting with Siebel CRM release 8.x. Siebel CRM disables Sort Search Optimization for DB2. For more information about rules-based optimizers, see Oracle9i Database Performance Tuning Guide and Reference.

Removing Duplicate Records From Queries

The Duplicate Elimination user property removes duplicate records from the result set of a query on a business component that runs in ForwardOnly mode. This result set might include multiple copies of the same record if one of the following situations exists:

- The intersection table includes duplicate rows. For example, Start Date is part of the association, and associations with different start dates are logically unique.
- The join references one or more destination columns that are not unique, and no join constraints or run-time search specifications exist.

You can use the Duplicate Elimination user property to determine how Siebel CRM handles these multiple copies. The value for this user property must contain a Boolean value. If:

- TRUE. Siebel CRM only aggregates the set of unique records that the memory currently contains. Do not do this aggregation as part of the SQL in the database layer.
- FALSE or this user property does not exist on the business component. Siebel CRM aggregates the set of unique records as part of the SQL that runs in the database layer. This aggregation provides superior performance. However, if any of the following conditions apply, then the Siebel Object Manager does this aggregation after Siebel CRM reads all rows from the database:
    - The Database Aggregation Flag parameter in the Server Datasource section of the configuration file is FALSE. This configuration sets Siebel CRM to server mode.
    - The DBAggregation parameter in the application .cfg file on the Mobile Web Client is FALSE.
    - A search specification includes a clause that the database cannot evaluate. Siebel CRM must evaluate this specification in memory.
    - Aggregation in the database fails for some reason.

This user property determines how Siebel CRM does aggregation. You must first make multiple settings in Siebel Tools to enable aggregation on a list column or for a multivalue link.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. No more than one instance can exist for each business component.

For more information about:

- Setting parameters in the configuration file, see *Siebel System Administration Guide* .
- Account hierarchies, see *Siebel Applications Administration Guide* .
- Configuring a list applet to display totals or to display totals in a separate applet for a multivalue link, see *Configuring Siebel Business Applications* .
- ForwardOnly mode, see *Siebel Object Interfaces Reference* .

Using Duplicate Elimination with a Denormalized Relationship

A situation might exist where Siebel CRM might denormalize the relationship and view that it uses for associations that exist in the context of the parent record. It might repeat the same parent row in the result set as an association to different child records that reside in the intersection table even if no duplicate associations exist. In this situation, it might be preferable to configure Siebel CRM to not reject duplicates.

Overriding Sort Specifications on Business Components

The All Mode Sort user property overrides the default sort specification that a business component contains. It can contain one of the following values:

- Normal. Use the Sort Specification property of the business component. This value allows the user to run a predefined query that incorporates a SORT. Any query that Siebel CRM does in a workflow process uses this Sort Specification property even if no visibility is set for the view.

- TRUE. Override the Sort Specification property of the business component. Use the U1 index. This index is the predefined user key. If Siebel CRM defines this user key on the primary extension table, especially for a business component that references the S_PARTY table, then this behavior reverts to Normal.
- FALSE. Remove all sorting.

Guidelines for Overriding Sort Specifications on Business Components

Siebel CRM overrides the sort specification on the business component for some visibility types to force the view to use an ORDER BY sort with the predefined user key. The All Mode Sort user property determines whether Siebel CRM overrides this sort specification. If it does do this override, then this user property determines the sort that Siebel CRM applies, if any, to the business component for the affected views.

If you set the Visibility Applet Type property of the view to one of the following values, then the All Mode Sort user property affects this view:

- All
- Catalog
- Group
- Manager
- Organization
- Sub-Organization

Note the following:

- If you set this user property to Personal or Sales Rep, then the All Mode Sort user property does not affect the view.
- If you configure the default sort order so that it sorts one of these views, then this configuration might display a large amount of data that Siebel CRM typically sorts only according to a user key.
- If you use All Mode Sort to override the default sort behavior, then it is recommended that you contact your database administrator to get guidance on how the database indexes the sort-by fields.
- It is recommended that you performance test the view and any reports that use the view.

Sorting According to the View Mode That the Business Component Uses

The ViewMode Sort: mode_num user property specifies a sort specification on a business component that is in view mode. The value for this user property must use the following format:

```
field name1, field nameN
```

where:

- field name identifies the name of a business component field.

The order that you use in this value determines the priority that Siebel CRM uses for each field that the sort uses.

CAUTION: To avoid a performance problem, any sort that you define must reference an indexed column. The items in this sort sorts must occur in the same sequential order that this index uses. This configuration includes any sort that you define with the ViewMode Sort user property.

mode_num contains an integer that identifies a view mode. The following table describes the integers that you can use. For information about these integers, see *Siebel Object Interfaces Reference* .

Integer	View Mode
1	ManagerView
3	AllView
5	OrganizationView
7	GroupView
8	CatalogView
9	SubOrganizationView

You can use the ViewMode Sort user property to sort items in a view that uses visibility other than the Personal or Sales Rep visibility. You can use it with the following views:

- All
- Catalog
- Group
- Manager
- Organization
- Sub-Organization

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Example of Configuring the ViewMode Sort User Property

If you set the All Mode Sort user property to FALSE for a business component, and if Siebel CRM displays this business component in a view mode that the ViewMode Sort user property supports, then Siebel CRM ignores all other sort specifications. For example, assume Siebel CRM must sort the records in a business component according to the Last Name field, and then by First Name, and that it must do this sort only if it displays this business component in an All view mode. The following table describes the user properties that you can add to the business component to support this example. For more information, see *Overriding Sort Specifications on Business Components*.

User Property	Value
All Mode Sort	FALSE
ViewMode Sort:3	Last Name, First Name

Disabling Automatic Trailing Wildcards in Queries

The Disable Automatic Trailing Wildcard Field List user property disables the automatic trailing wildcards that Siebel CRM uses in a query on a field. You cannot disable this user property for a DTYPE_PHONE field.

The value for this user property must contain a list of fields separated by commas. You can add this user property to a business component to disable automatic trailing wildcards for individual fields. For example:

- Name. Disable Automatic Trailing Wildcard Field List.
- Value. First Name, Last Name.

To disable automatic trailing wildcards

1. In the Siebel Web Client, navigate to the Administration - Server Configuration screen, Enterprises, and then the Component Definitions view.
2. In the Component Definitions list, locate the relevant component.

   For example, to disable automatic trailing wildcards for Siebel Sales, locate the following component:

   ```
   Sales Object Manager (ENU)
   ```
3. Click Menu, and then click Start Reconfiguration.
4. In the Component Parameters list, locate Automatic Trailing Wildcard, and then set the Value field to FALSE.
5. In the Component Parameters list, click Menu, and then click Commit Reconfiguration.
6. Restart the server component.

   For more information about starting and stopping server components, see *Siebel System Administration Guide* .

Adding Search Criteria to the Query Assistant

The QueryAssistantNumQueries user property adds a search criterion to the Query Assistant. The predefined Query Assistant uses four search criteria in a query. Siebel CRM displays them as four rows that the user can choose. It also includes an operator for the query and the value that Siebel CRM must query.

The following information lists the predefined fields in the Query Assistant business component that correspond to each other for each criteria.

Query Field	Operator Field	Value Field
Field1	Operator1	Value1

Query Field	Operator Field	Value Field
Field2	Operator2	Value2
Field3	Operator3	Value3
Field4	Operator4	Value4

To add search criteria to the Query Assistant

1. In the Business Component User Properties list, locate the QueryAssistantNumQueries user property, and then set the Value property to 5.

   For more information, see *Viewing a Business Component User Property*.
2. In the Object Explorer, click Field.
3. In the Fields list, click the Field4 field, choose the Edit menu, and then click Copy Record.
4. Set the Name property to Field5.
5. In the Fields list, click the Operator4 field, choose the Edit menu, and then click Copy Record.
6. Set the Name property to Operator5.
7. In the Fields list, click the Value4 field, choose the Edit menu, and then click Copy Record.
8. Set the Name property to Value5.
9. Add a control for each field that maps to the Query Assistant applet.
10. Display the controls in the Web layout.

Saving Query Results in Target Lists

The TargetProp n user property specifies a target list for a business component. It uses the following format:

```
"EntityDisplayName", "MVFName", "ListCategory"
```

where:

- EntityDisplayName identifies a language-independent code value that the SLM_FIELD_DISPLAY list of values contains.
- MVFName identifies the name of the multivalue field that stores the target list.
- ListCategory identifies one of the display values that the SLM_LST_CATEGORY list of values contains. These values are Account, Contact, Employee, Position, or Prospect.

For example:

```
"Accounts", "List Mgmt List Id", "Accounts"
```

Targeting is a type of query that allows the user to save query results in a target list, and then apply this list to other views.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it for each target list, or deactivate it.

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

For more information, see *How This Book Describes the User Property Format*.

For more information about how to configure a target list, see the topic about global target list management in the *Siebel Applications Administration Guide* .

Specifying How to Sort Predefined Queries for Opportunities

The Sort Field Map n user property determines how Siebel CRM sorts a predefined query on a business component that stores opportunity data. It uses the following format:

```
"field", "redirect field"
```

where:

- field is the name of a multivalue field that resides in the current business component. This field stores opportunity data that Siebel CRM maps to a field that resides in the Revenue business component. The Revenue field and the Close Date field are examples of this field.
- redirect field is the name of a single-value field that resides in the current business component. This field stores opportunity data. Siebel CRM maps it to the same revenue field that resides in the primary revenue record for the opportunity. The Primary Revenue Amount field and the Primary Revenue Close Date field are examples of a redirect field.

A one-to-many relationship exists between a business component that handles opportunity data and the Revenue business component. This relationship enables the master and detail view that displays the revenue records that Siebel CRM associates with an opportunity. The Opportunity business component and the Global Account Opportunity business component are examples of business components that handle opportunity data.

Opportunities typically include multivalue fields that reference fields that reside in the Revenue business component. For example, the Revenue field that resides in the Opportunity business component references the Revenue field that resides in the Revenue business component. An existing predefined query on opportunities might include a sort specification that references one or more of these multivalue revenue fields. The Sort Field Map user property redirects this sort to the corresponding single-value field in the opportunity at runtime. For example, it redirects a sort specification that resides on the Revenue multivalue field in the Opportunity business component to the Primary Revenue Amount field. This field contains the revenue amount for the primary revenue record of the opportunity. You can use the Sort Field Map n user property to specify how Siebel CRM does this redirect.

You can specify this user property with or without the numeric suffix. However, you typically add multiple instances to redirect multiple revenue fields. The numeric suffix differentiates these instances. For more information, see *Numbering Instances of a User Property*.

You must not configure Siebel CRM to deactivate this user property or modify the value for it, but you can configure Siebel CRM to create a new instance of it.

For information about configuring a sort specification in a predefined query, see *Configuring Siebel Business Applications* . For information about the primary revenue record for an opportunity, see *Siebel Applications Administration Guide* .

Example of Configuring the Sort Field Map User Property

For an example of configuring the Sort Field Map user property, assume you define the user properties that the following table describes in the Opportunity business component.

User Property	Value
Sort Field Map 1	"Revenue","Primary Revenue Amount"
Sort Field Map 2	"Close Date","Primary Revenue Close Date"

In this example, the following sort specification in a predefined query provides a result set that Siebel CRM sorts in descending order according to the revenue amounts that exist in the primary revenue records of the opportunities:

```
'Opportunity'.Sort = "Revenue (Descending)"
```

The following sort specification in a predefined query provides a result set that Siebel CRM sorts according to the revenue close dates that exist in the primary revenue records:

```
'Opportunity'.Sort = "Close Date "
```

Alternative to Configuring the Sort Field Map User Property

For a new predefined query, it is recommended that you do not configure the sort specification to reference a multivalue field. You can configure the sort specification to reference a single-value field instead of using the Sort Field Map user property to do a redirect. For example, you can use the corresponding Primary Revenue field. You can use the following instead of using 'Opportunity'.Sort = "Close Date ":

```
'Opportunity'.Sort = "Primary Revenue Close Date"
```

Specifying Search Specifications for the Action Business Component

The Activity SearchSpec user property specifies a search specification for the Action business component. The value for this user property must contain a valid search specification. For example:

```
[Status]= LookupValue('EVENT_STATUS', 'Open') AND [Class] = LookupValue('FS_ACTIVITY_CLASS',
'Sales Activity')
```

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it. For more information, see *How This Book Describes the User Property Format*.

Specifying Search Specifications for Nonsales Rep Views

The Non-SalesRep View Mode SearchSpec user property specifies the search specification that Siebel CRM uses on a business component if it is not in Sales Rep mode. The value for this user property must contain a valid search specification for the business component.

The fields that you include in this search specification must exist in the business component and the values for the fields must be valid. For example, the following search specification is valid:

```
"[Secure Flag] = 'N' OR [Secure Opty Id] IS NOT NULL"
```

This specification references the Secure Flag field and the Secure Opty Id field. It configures Siebel CRM to display business component records that are not secure. It also displays records that include a value in the Secure Opty Id field. This configuration indicates that the current record is not secure.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

For more information, see *How This Book Describes the User Property Format*.

Controlling Visibility Filters

This topic describes business component user properties that you can use to control visibility filters. It includes the following topics:

- *Controlling Global Account Visibility*
- *Controlling My Visibility Filters*
- *Controlling Manager Visibility Filters*

Controlling Global Account Visibility

The dynamic hierarchy user properties define relationships that control visibility in Global Accounts views that the Accounts screen contains. The value for these user properties must contain the name of a field that resides in the current business component, not enclosed in quotes.

Siebel CRM provides default values for this user property for the business components that the following items in Global Account views reference:

- Subaccounts
- Contacts
- Activities
- Opportunities
- Sales teams

If your Siebel CRM implementation does not use global accounts, then you can deactivate this user property. It is recommended that you seek technical assistance because inactivating this user property might affect the account reporting hierarchy relationship. For more information, see *Getting Help From Oracle*.

You must not configure Siebel CRM to create a new instance of this user property.

Dynamic Hierarchy Id Field

The DynHierarchy Hierarchy Id Field user property specifies a business component field that defines a join to an account hierarchy. This relationship determines the business component records that Siebel CRM displays in the flat list that it associates with an account hierarchy in Global Accounts views.

For example, the value of this user property in the Global Account Action business component is Dynamic Hierarchy Id. The content of the Dynamic Hierarchy Id field on the Global Account Action business component is the ID of a record that resides in the table that defines account hierarchies. Siebel CRM associates a Global Account Action record with the account hierarchy where the activity account resides. Siebel CRM displays this record in the flat list of activities for the parent account and for any other account that exists in the hierarchy.

Dynamic Hierarchy Parent Field Id

The Dynamic Hierarchy Parent Field Id user property specifies a business component field that stores the ROW_ID of the parent account for the account hierarchy. For example, Account. This field must be active or the Force Active property of the field must be TRUE.

Dynamic Hierarchy Visibility Organization Id Field

The DynHierarchy Visibility Organization Id Field user property specifies a business component field that defines the join between accounts and organizations. This relationship identifies the records that Siebel CRM displays in the flat list of the business component if the user clicks All Global Accounts or All Global Accounts Across Organizations.

For example, the value of this user property on the Global Account Contact business component is DynHierarchy Visibility Organization Id. The default value of the DynHierarchy Visibility Organization Id field is the alias of the join that joins accounts and organizations. Siebel CRM associates a Global Account Contact record to the same organization that it associates with the account.

If the user sets visibility to All Global Accounts, then the hierarchy only displays accounts that reference the same organization that the user position references. This organization includes only the contact records that the account contains that Siebel CRM displays in the flat list of contacts for a hierarchy.

Dynamic Hierarchy Visibility Position Id Field

The DynHierarchy Visibility Position Id Field user property specifies the business component field that specifies the join to positions. This relationship defines the records that Siebel CRM displays in the flat list of the business component if the user clicks My Global Accounts.

For example, the value of this user property on the Global Account Opportunity business component is DynHierarchy Visibility Position Id. The default value of the DynHierarchy Visibility Position Id field is the alias of the join that joins positions or team members and accounts. Siebel CRM associates a Global Account Opportunity record with the team members that exist on the account. If the user clicks My Global Accounts, then the hierarchy displays only the accounts that include the user position on the account team. It displays the opportunity records in the flat list of opportunities for an account hierarchy. It displays an opportunity only if the current user is on the account team that includes this opportunity.

Controlling My Visibility Filters

The Employee Link user property restricts data visibility to the data that Siebel CRM associates with the user login. The value for this user property must contain the name, not enclosed in quotes, of a link that includes the following items:

- Parent business component is Employee.
- Child business component is the current business component.

For example:

```
Employee/My Competitor
```

Siebel CRM uses the business component where you set this user property to configure the My view that restricts data according to the user name that the user enters during the login instead of the position.

For example, the My Competitor business component provides data for the SI Com Tracked Competitors View in Siebel Briefings. Siebel CRM labels this view as My Tracked Competitors in the client. It sets the Employee Link user property that resides on the My Competitor business component to Employee/My Competitor. This view only lists competitor records that the Employee/My Competitor link associates with the user. These are the competitors that the user enters.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. No more than one instance can exist for each business component.

Controlling Manager Visibility Filters

The Manager List Mode user property specifies the records that Siebel CRM displays in a manager view. The value for this user property must contain one of the following values:

- Primary. Display only the records that are related to the primary team members who report to this manager.
- Team. Display the records for all people who report to the manager. Siebel CRM does a subquery for the My Team's view so that it can get and display the accounts, opportunities, and so on for all members that the team contains, and not only for the primary team members. Performance is slower but this query yields more data.

Controlling Records

This topic describes business component user properties that you can use to control records. It includes the following topics:

- *Making Records Read-Only According to a Field Value*
- *Disabling Modifications to Saved Records*
- *Allowing Administrators to Modify Records*
- *Preventing Administrators from Deleting Records*
- *Preventing Administrators from Updating Records*
- *Calculating Values When Writing Records*
- *Specifying Sequential Line Numbers for New Records*

- *Specifying Sequential Line Numbers for New Records According to Maximum Values*
- *Setting Business Components to Read-Only According to a Field Value*
- *Setting Business Components to Read-Only According to a Name*
- *Using Literals Instead of Bind Variables When Merging Records*

Making Records Read-Only According to a Field Value

The BC Read Only Field user property specifies the business component field that determines whether a record is read-only. If the value that this field contains is TRUE, then the current record is read-only.

If you set the Admin Mode Flag property to TRUE, then this setting overrides the BC Read Only Field user property. For information, see *Allowing Administrators to Modify Records*.

Disabling Modifications to Saved Records

The No Change Field n user property disallows modifying a field value after Siebel CRM saves the record. It must specify the name of a business component field, not enclosed in quotes.

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Allowing Administrators to Modify Records

The Admin Mode Field user property determines whether a business component is currently in Admin mode. It allows an administrator to delete, insert, merge, or update records regardless of how you set the following business component properties:

- No Delete
- No Insert
- No Merge
- No Update

Siebel CRM typically sets the Admin Mode Flag property of an administrative view to TRUE to allow an administrator to configure Siebel CRM to do these operations regardless of how you set these properties.

Requirements for Using Admin Mode

If you set the Admin NoDelete user property on a business component, then Siebel CRM cannot delete records in any view that references this business component. This situation also applies for the Admin NoUpdate user property. For more information about Admin Mode, see *Siebel Security Guide* and *Configuring Siebel Business Applications* .

The value for this user property must contain the name of a field, not enclosed in quotes. This field must possess the following characteristics:

- Reside in the current business component
- Active

- Calculated
- Of type DTYPE_BOOL
- Contain a value of ""

Siebel CRM uses the value of the Admin Mode Flag property of the current view to determine the business component behavior at runtime. For example, assume you create a calculated business component field and name it IsAdminMode. It is recommended that you use this naming format, but it is not required. You add the Admin Mode Field user property with a value of IsAdminMode to the business component.

CAUTION: All views and drilldowns that a screen contains that are enabled for Admin Mode also work in Admin Mode because of their subordinate relationship to the screen. This behavior applies even if you set the Admin Mode Flag property of a view to False.

You can configure Siebel CRM to modify the value for this user property, deactivate it, or create a new instance of it, but no more than one instance for each business component.

Using a Script to Set the Admin Mode

You can use the Admin Mode Field user property in a script to determine if a business component is currently in Admin mode. The following example displays Y only if the business component is currently in Admin mode:

```
function BusComp_NewRecord ()
{
var isAdmin = this.GetFieldValue("IsAdminMode");
var WshShell = COMCreateObject("WScript.Shell");
WshShell.Popup(isAdmin);
}
```

Preventing Administrators from Deleting Records

The Admin NoDelete user property prevents Siebel CRM from deleting business component records if a view is Admin mode. It must contain a Boolean value of Y or N. If a business component does not include this user property, then Siebel CRM defaults this value to N.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. No more than one instance can exist for each business component.

For more information, see *Allowing Administrators to Modify Records*.

Preventing Administrators from Updating Records

The Admin NoUpdate user property prevents Siebel CRM from updating business component records if a view is in Admin mode. It must contain a Boolean value of Y or N. If a business component does not include this user property, then Siebel CRM defaults this value to N.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. No more than one instance can exist for each business component.

For more information, see *Allowing Administrators to Modify Records*.

Calculating Values When Writing Records

The Calc Actual OnWriteRecord user property calculates a number when Siebel CRM writes a record. It can contain one of the following values:

- Y. Calculate the Actual Number.
- N. Do not calculate the Actual Number.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Specifying Sequential Line Numbers for New Records

The Sequence Field user property configures a sequence field to create a sequential line number when Siebel CRM creates a new record or copies a record. This user property must contain the name of the business component field that corresponds to the sequence number column that resides in the table that this business component references. This field is typically Line Number or Sequence Number. Note the following:

- The business object must reference a sequence business component.
- You must set the Insert Position property to LAST for each applet that displays a record from the numbered detail business component. If this user property is empty, then unexpected behavior might result in the line numbers that Siebel CRM creates in the applet.
- You must do other configuration work. For more information, see the topics that describe creating a sequence field in *Configuring Siebel Business Applications* .

For information about how Siebel CRM uses a sequenced field to number a new record, see *Specifying Sequential Line Numbers for New Records According to Maximum Values*.

Specifying Sequential Line Numbers for New Records According to Maximum Values

The Sequence Use Max user property creates a sequence number for a new or copied record. It must specify one of the following values:

- Y. Set the sequence number to the maximum existing sequence number plus 1.
- N or this user property does not exist. Set the sequence number to the sequence number of the current record plus 1. Renumber other records, if necessary.

For example, the following table describes a configuration that defines the Line Number field as the sequence field and sets the sequence for any new or copied record to the value of the maximum existing sequence plus 1. For more information, see *Specifying Sequential Line Numbers for New Records*.

User Property	Value
Sequence Field	Line Number

User Property	Value
Sequence Use Max	Y

Setting Business Components to Read-Only According to a Field Value

The Parent Read Only Field user property sets a business component to read-only according to the value that a field contains. It restricts the detail records that Siebel CRM displays in a multivalue group. The value for this user property must use the following format:

```
buscompname.fieldname
```

where:

- buscompname specifies the name of the parent business component.
- fieldname specifies the name of a field that resides in the parent business component. If Siebel CRM evaluates the value of this field to TRUE or Y, then it sets the current business component to read-only. Note the following:
  - The business component that contains this field must be a parent or grandparent of the business component that Siebel CRM sets to read-only. A link or a series of links must create this relationship.
  - The Link Specification property of this field must be set to TRUE. If it is FALSE, then this user property does not work correctly. The exception is if Siebel CRM displays the child record in the multivalue field in the parent business component, then you can set this Link Specification property to FALSE.

To restrict the detail records that Siebel CRM displays in a master and detail view, you must make sure that some other business object does not use the business component that Siebel CRM sets to read-only.

You add this user property to the business component that Siebel CRM must set to read-only.

For more information, see *How This Book Describes the User Property Format*.

For more information about the Parent Read Only Field user property, see *Configuring Siebel Business Applications* .

Setting Business Components to Read-Only According to a Name

The Parent Read Only Field: buscompname user property specifies the name of a field that resides in a parent business component. This business component contains a calculated field that Siebel CRM evaluates to TRUE or FALSE or Y or N. This behavior is similar to *Setting Business Components to Read-Only According to a Field Value*, except that the name instead of the value specifies the name of the parent business component. If the calculated field evaluates to TRUE or Y, then Siebel CRM sets the child business component to read-only.

The value for this user property must contain a field name.

This user property uses multiple fields as part of the decision to make the current record read only. For example, the following table describes a configuration that makes a contact read-only in a parent service request, account, or

opportunity according to different fields that reside in these parents. If the current record that resides in the Contact business component includes a parent of Service Request, Account, or Opportunity, and if Siebel CRM evaluates the field that the Value property identifies to TRUE, then it sets the record to read-only.

User Property Name	Value
Parent Read Only Field: Service Request	field name
Parent Read Only Field: Account	field name
Parent Read Only Field: Opportunity	field name

Using Literals Instead of Bind Variables When Merging Records

The Use Literals For Merge: table_name user property creates a literal in an SQL statement for predicates that reside on a column that possesses low cardinality. It can contain one of the following values:

- TRUE. Use a literal value instead of a bind variable as criteria in an SQL statement where the predicate resides on a column that is a foreign key to table_name.
- FALSE or the user property does not exist. Use a bind variable instead of a literal value.

table_name identifies the name of a table. The current business component includes a field that is a foreign key column to this table.

For example, assume you add the following user property and set the value for it to TRUE:

```
Use Literals For Merge:S_BU
```

In this example, Siebel CRM uses literals instead of bind variables in SQL statements whose predicates reside on a column that is a foreign key to S_BU.

Siebel CRM uses a bind variable for all predicates when it merges records. In some situations, if the cardinality of the column is low, and if using an index is more efficient, then DB2 does table scans.

You add this user property to the business component where Siebel CRM merges records.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Controlling Fields

This topic describes business component user properties that you can use to control fields. It includes the following topics:

- *Making Fields Active*
- *Making Fields Read-Only*
- *Disallowing Empty Fields*

- *Disabling Field Deletion*
- *Setting Field Values According to Conditions*
- *Updating Fields When Siebel CRM Updates Other Fields*
- *Calling Methods When Siebel CRM Updates Fields*
- *Setting the Field Created Date to the Saved Date*
- *Updating the Planned Field if the Start Date Field Is Modified*
- *Overriding the Type for Fields That Users Read from Right-To-Left*
- *Setting Default Values for Fields That Use Drop-Down Lists*
- *Modifying the Currency That a Field Uses*
- *Specifying Field Name Prefixes for File Attachment Business Components*

For information about using field user properties to control fields, see *Field User Properties*.

Making Fields Active

The following user properties together determine if a record is active:

- Active Field. Specifies the business component field that Siebel CRM uses as the active flag for this business component.
- Active Value. Specifies how to interpret the value of this flag.

The value for the Active Field user property must contain the name of a field that resides in the current business component and that Siebel CRM uses as the active flag for this business component. You must enclose this value in quotes.

If the value of the active flag for a record is:

- Y. This record is active in any of the following situations:
  - The value of the Active Value user property is Y.
  - The Active Value user property does not exist for a business component.
- N. If the value of the Active Value user property is N, then this record is active.

Consider the following example:

- The value of the Active Field user property on the Quote business component is Active.
- The Active Value user property does not exist on the Quote business component.

In this situation, if the value of the Active field on a record is Y, then this record is active.

Consider the following example:

- The value of the Active Field user property of the Fund business component is Locked Flag.
- The value of the Active Value user property of the Fund business component is N.

In this situation, if the value of the Locked Flag field on a record is N, then this record is not locked.

Siebel CRM can update an active record. It cannot update a record that is not active.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. No more than one instance can exist for each business component.

Making Fields Read-Only

The Field Read Only Field: fieldname user property sets a business component field to read-only. The fieldname value for this user property must contain the name of a business component field. This field must contain a Boolean value.

If Siebel CRM evaluates the field that this user property references to TRUE at runtime, then it sets the field that fieldname specifies to read-only.

For example, if Field Read Only Field: Sales Rep contains a value of Calculated Primary Flag, and if the Calculated Primary Flag field is TRUE, then Siebel CRM sets the Sales Rep field to read-only.



CAUTION: You must not use this user property with the Abstract field of the Service Request business component. If you do this, then Siebel CRM examines the Abstract field to determine if it is read-only. If it is read-only, then the entire Service Request business component becomes read-only and the user cannot add an activity or attachment to a service request.

This user property does not work correctly on the Fund Request business component because of the specialized business component code that the parent CSSBCFundReq class contains. For important caution information, see *Using Specialized Classes*.

Disallowing Empty Fields

The No Clear Field n user property disallows setting a field value to an empty value. It must specify the name of a business component field, not enclosed in quotes.

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

Disabling Field Deletion

The NoDelete Field user property restricts the records that Siebel CRM deletes. It must specify the name of a business component field.

Siebel CRM does not delete records that contain a value of Y in the business component field that you specify. For example, assume the following configuration exists on the Contact business component:

- The NoDelete Field user property contains a value of Protect Internal Employee Flag.
- The Protect Internal Employee Flag field of a record is Y.

In this example, Siebel CRM cannot delete this record.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. No more than one instance can exist for each business component.

Setting Field Values According to Conditions

The On Condition Set Field Value user property specifies the value for a field according to a condition. The value for this user property must use the following format:

```
"Condition", "FieldName", "FieldValue"
```

where:

- Condition specifies the condition that Siebel CRM evaluates.
- FieldName specifies the name of a business component field.
- FieldValue specifies the value.

If Siebel CRM evaluates Condition to TRUE, then it sets the FieldName to the FieldValue.

If the condition is TRUE in the following example, then Siebel CRM sets the Employee Flag field to Y:

```
"[Primary Held Position Id] is not null and [Primary Held Position Id]
<> ""No Match Row Id""", "Employee Flag", "Y"
```

Double quotes (") must enclose each parameter. A comma and a space must separate each parameter.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

For more information, see *How This Book Describes the User Property Format*.

Updating Fields When Siebel CRM Updates Other Fields

The On Field Update Set n user property sets the value of a business component field when Siebel CRM updates another field. The value for this user property must use the following format:

```
"FieldToCheck", "FieldToSet", "Value", "Condition"
```

where:

- Value and Condition are optional parameters.

Note the following:

- If Siebel CRM updates FieldToCheck, then it sets FieldToSet to Value.
- If you do not include the Value parameter, then it sets FieldToSet to the value that FieldToCheck contains.
- If you include Condition, then it updates FieldToSet only if Condition evaluates to TRUE.
- Double quotes (") must enclose each parameter. A comma and a space must separate each parameter.

For more information, see *How This Book Describes the User Property Format*.

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

Setting the Value Parameter of On Field Update Set

The Value parameter can contain an expression. If Siebel CRM updates the Done Flag in the following example, then it uses an IIF expression to set the Done field:

```
"Done Flag", "Done", "IIF ([Done Flag] = "Y", Today (), "")"
```

Any expression you use must evaluate to the same data type that the target field uses. In the following example, Siebel CRM uses the ToChar function to convert the date to a string before it concatenates it with another string and sets the field value:

```
"Agreement Start Date", "Name", "ToChar([Agreement Start Date])+ [Agreement Type]"
```

Setting the Condition Parameter of On Field Update Set

In the following example, if Siebel CRM updates the Primary Revenue Amount field, then it sets the Revenue field of the Opportunity business component, but only if the IsParentBCRevn field contains a value of N:

```
"Primary Revenue Amount", "Revenue", "[Primary Revenue Amount]","[IsParentBCRevn] = 'N'"
```

Using On Field Update Set with An Address Business Component

Siebel CRM concatenates street address, city, and state so that it can populate the Address Name field of an address business component, such as Business Address. If the user updates the street address, city, or state, then Siebel CRM uses multiple instances of the On Update Field Set user property to set the value of a calculated field. In the following example, if the user updates a city, then Siebel CRM uses an On Update Field Set user property that contains the following value:

```
"City", "Address Name", "IIF( [Address Name Locked Flag] = ""N"",
[Calculated Address Name], [Address Name])"
```

If the user updates the street address or the state, then Siebel CRM uses similar user property instances to update the Address Name field.

Guidelines for Updating Fields When Siebel CRM Updates Other Fields

If you configure the On Field Update Set n user property, then use the following guidelines:

- Do not use this user property to set a multivalue or calculated field. If FieldToSet is a multivalue or calculated field, then Siebel CRM does not update it when it examines FieldToCheck.
- Do not define FieldToCheck as a field on a multivalue group. This user property does not recognize modifications that Siebel CRM makes in a multivalue group field, including modifying the primary field by modifying the primary record of a multivalue group. For example, assume you use the following value for the On Field Update Set user property on the Contact business component:

```
"Primary Address Id", "Email Address", "my@oracle.com"
```

If the user modifies the primary of the Street Address multivalue group, then Siebel CRM does not update the Email Address field.

Calling Methods When Siebel CRM Updates Fields

The On Field Update Invoke n user property calls a business component method when Siebel CRM updates a field. The value for this user property must use the following format:

```
"[FieldToCheck]", "[BusCompName]", "[MethodName]","[Condition]"
```

If Siebel CRM updates FieldToCheck, then it calls the MethodName that the BusCompName contains. If you do not include FieldToCheck, then it calls this method when the user saves the record.

You can optionally include a condition. If you define a condition, then Siebel CRM calls this method only if the condition evaluates to TRUE.

For more information, see *How This Book Describes the User Property Format*.

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

Setting the Field Created Date to the Saved Date

The Post Default Created Date To Date Saved user property sets the Created Date of a field to the Saved Date when Siebel CRM saves a record. You can set this user property to one of the following values:

- TRUE. Set the Created Date to the Saved Date.
- FALSE. Do not modify the Created Date.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Updating the Planned Field if the Start Date Field Is Modified

The Update Planned Field On Set: StartDate, StartTime user property automatically updates the Planned field when Siebel CRM updates the Start Date field. It can include one of the following values:

- Y. Update the Planned field.
- N or this user property does not exist. Do not update the Planned field.

Siebel CRM uses this user property with the CSSBCPharmaSpecializedAct class. For important caution information, see *Using Specialized Classes*.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Overriding the Type for Fields That Users Read from Right-To-Left

The DisplayType user property overrides the Type property of a field that Siebel CRM configures for right-to-left (RTL) display. It is applicable only if Siebel CRM uses this right-to-left configuration. It displays text fields as data types. For example, DTYPE_ID, DTYPE_PHONE, and so on.

The value for this user property must contain one of the following values:

- DTYPE_CURRENCY
- DTYPE_DATE
- DTYPE_ID
- DTYPE_INTEGER
- DTYPE_NUMBER

- DTYPE_PHONE

Displaying data from right to left for some fields does not make sense. For example, a service request number must always display from left to right. Siebel CRM sets the Type property for the SR Number field to DTYPE_TEXT. It sets the DisplayType user property for this field to DTYPE_ID to make sure the service request number displays left to right.

Setting Default Values for Fields That Use Drop-Down Lists

The Picklist Pre Default Field n user property sets default values for fields in a new record of the child business component. To set these values, CRM gets values from the parent business component record. The value for this user property must use the following format:

```
"field", "'buscomp1.field1','buscomp2.field2',' . . .'"
```

where:

- field is a field that resides in the current business component.
- buscompn.fieldn is the name of a field that resides in the parent business component.

For example, assume a view references a parent Action business component. The user can use a drop-down list that references the child Opportunity business component to create a new record.

Note the following format requirements:

- You must include a space after the first comma.
- You must use double quotes (") to enclose the list of buscompn.fieldn entries.
- You must use single quotes to enclose each buscompn.fieldn entry.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

For more information, see *How This Book Describes the User Property Format*.

Using Multiple Instances of Picklist Pre Default Field

You can configure Siebel CRM to use multiple instances of the Picklist Pre Default Field n user property. For example, to create a new opportunity, the user can use an Opportunity drop-down list in each of the following applets:

- Activity Form Applet that references the Action business component
- Comm Outbound Item Form Applet that references the Comm Outbound Email business component

If the user creates a new opportunity from the drop-down list in each of these applets, then Siebel CRM sets a default value for the Account for the opportunity and the Account Id field. It uses the corresponding field value from the parent record to get these default values.

The following table describes user properties that this example uses on the Opportunity business component. For more information, see *Numbering Instances of a User Property*.

User Property Name	Value
Picklist Pre Default Field 1	"Account", "'Action.Account Name', 'Comm Outbound Email.Account Name'"
Picklist Pre Default Field 2	"Account Id", "'Action.Account Id', 'Comm Outbound Email.Account Id'"

Modifying the Currency That a Field Uses

The Currency Field n user property specifies the name of a field that stores currency data. If the user modifies the currency code, then Siebel CRM does a currency exchange operation on the data that this field contains, and then updates the field value.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

Specifying Field Name Prefixes for File Attachment Business Components

The DefaultPrefix user property specifies the unique field name prefix for each business component that Siebel CRM uses for file attachments. It must specify a string that Siebel CRM uses for the prefix in the names of the required fields that these business components contain. You do not enclose this value with quotes.

Each business component that Siebel CRM uses for file attachments includes a unique field name prefix. For example, the value of the DefaultPrefix user property for the Account Attachment business component is Accnt because the required fields for this business component are named AccntDockStatus, AccntFileDate, AccntFileName, and so on. For more information, see the table in *Dependencies and Limitations for the CSSBCFile Class*.

To create the entire field name for the required fields in any file attachment business component, a method uses the default prefix that this user property specifies. A method can use this prefix to access the required fields without using the literal name of each field.

You can modify the value for this user property. You cannot create more than one instance of this user property, and you cannot deactivate this user property.

Controlling Primaries

This topic describes business component user properties that you can use to control primaries. It includes the following topics:

- *Specifying Who Can Modify Primary Team Members*
- *Setting the Primary Sales Rep as the Owner*
- *Setting the Current User as the Primary Contact*
- *Allowing Only the Primary to Modify Sales Methods for Opportunities*
- *Restricting How Siebel CRM Displays Private Activities for Primaries*

Specifying Who Can Modify Primary Team Members

The MVG Set Primary Restricted: visibility_mvlink_name user property determines who can modify the primary team member of an opportunity, account, or contact. The value for this user property must contain one of the following values:

- TRUE or this user property does not exist. Only a Siebel Administrator in Admin view mode or a Manager in Manager view mode can modify the primary team member.
- FALSE. Someone other than the Manager or Siebel Administrator can modify the primary team member.

visibility_mvlink_name identifies the name of a multivalue link that resides in the BusComp View Mode child object of the business component where you must configure this visibility.

The following example describes how to control who can modify the primary sales team members for contacts.

To specify who can modify primary team members

- Create the following user property on the Contact business component:

User Property Name	Value
MVG Set Primary Restricted: Position where: • Position is the value of the Visibility MVLink property of the Sales Rep business component view mode that resides on the Contact business component.	FALSE

Setting the Primary Sales Rep as the Owner

The Set Primary Sales Rep As Owner user property identifies the Primary Sales Rep that Siebel CRM assigns to the user who is currently logged in, and then assigns all new activities to this Primary Sales Rep. It can contain one of the following values:

- Y. Assign the current user as the Primary Sales Rep for all new activities.
- N or this user property does not exist. Do not assign all new activities.

This user property is applicable only if the business component name is Action (Web), and only if Siebel CRM uses it for the Professional Portal LS application.

Siebel CRM supports this user property with the CSSBCFINSActivity class but not for any subclass of CSSBCFINSActivity.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Setting the Current User as the Primary Contact

The Set User As Contact user property assigns the current user as the Primary Contact for all new activities. It can contain one of the following values:

- Y. Assign the current user as the Primary Contact for all new activities.
- N or this user property does not exist. Do not assign all new activities.

This user property is applicable only if the business component name is Action (Web), and only if Siebel CRM uses it for the Professional Portal LS application.

Siebel CRM supports this user property with the CSSBCFINSActivity class but not for any subclass of CSSBCFINSActivity.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Allowing Only the Primary to Modify Sales Methods for Opportunities

The Primary Position Modification user property specifies who can modify the Sales Method of an opportunity. You can set this user property to one of the following values:

- Y. Only the primary position can modify the Sales Method.
- N. Anyone can modify the Sales Method.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Restricting How Siebel CRM Displays Private Activities for Primaries

The Private Activity Search Spec user property includes a search specification that restricts the activities that Siebel CRM displays to activities that include one of the following:

- The Private flag is not set.
- The user who is currently logged in is the primary owner.

You can define other restrictions, as necessary.

The value for this user property must include a valid search specification. For example:

```
[Private] = 'N' OR [Private] IS NULL OR [Primary Owner Id] = LoginId ()
```

This value supports typical search specification functionality, such as the following:

```
IIf(condition, search spec 1, search spec 2)
```

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

For more information, see *How This Book Describes the User Property Format*.

Specifying Business Services

This topic describes business component user properties that you can use to specify business services. It includes the following topics:

- *Calling Business Service Methods from Business Components*
- *Specifying Business Service Parameters*
- *Specifying External Data Sources for Business Services*
- *Specifying Business Services for Virtual Business Components*

For information about using business service user properties, see *Business Service User Properties*.

Calling Business Service Methods from Business Components

The Named Method n business component user property calls a business component or business service method, or sets a field value. You can use it instead of scripting. The value that this user property can contain and the usage for it is similar to the value and usage that you can use for the Named Method n applet user property. For more information, see *Calling Methods from Applets*.

Specifying Business Service Parameters

The Service Parameters user property specifies parameters for a business service. The value for this user property must use the following format:

```
ParamName1=ParamValue2;ParamName2=ParamValue2;ParamNameN=ParamValueN
```

where:

- ParamName specifies the name of a parameter.
- ParamValue specifies the value for the parameter that Siebel CRM sends to the business service. For example:

```
DLLName=VirtualBusCompODBC.dll
```

The Pre_Invoke method typically parses these parameters. A virtual business component typically uses these values in a workflow process. For more information about configuring a business service in a workflow process, see the *Siebel Business Process Framework: Workflow Guide* .

For more information, see *How This Book Describes the User Property Format*.

Specifying External Data Sources for Business Services

The Remote Source user property specifies an external data source that a business service uses. The value for this user property identifies the name of this external data source. For example:

```
DSN=EXCELABCCust
```

You can configure Siebel CRM to deactivate this user property or modify the value for it.

Specifying Business Services for Virtual Business Components

The Service Name user property specifies a business service that a virtual business component uses. The value for this user property must contain the name of a business service.

Controlling Parent and Child Relationships

This topic describes business component user properties that you can use to control parent and child relationships. It includes the following topics:

- *Copying and Deleting Child and Grandchild Records*
- *Updating the Parent Business Component if Siebel CRM Modifies Children*
- *Specifying Recursive Links Between Parent and Child Business Components*
- *Enabling Service Request Updates in Child Business Components*

Copying and Deleting Child and Grandchild Records

The Deep Copy and Deep Delete user properties copy or delete a record. For example, a deep copy user property can copy the detail records that a child business component contains from the original record to a new record that the parent business component contains. If Siebel CRM uses one of these user properties, then it examines sources according to the following order to determine the parent and child link that it must use:

1. The parent and child reside in the same business component. The Recursive Link user property that resides in the business component must define the relationship. Siebel CRM uses this link to identify child records. For more information, see *Specifying Recursive Links Between Parent and Child Business Components*.
2. The Deep Copy/Delete Link user property is set on the parent business component. Siebel CRM uses the link that the Deep Copy/Delete Link user property specifies. For more information, see *Specifying the Link for Deep Copy and Delete* .
3. The parent and child business components are of the same Siebel object, and the parent is the primary business component in the business object. Siebel CRM determines whether a link from the parent to the child exists. If it exists, then Siebel Tools displays it in the Link property in the Business Object Component list.
4. These steps do not provide a link between the parent component and the child business component. Siebel CRM determines whether a link named parent business component/child business component exists. For example, Opportunity/Revenue. If this link exists, then Siebel CRM uses it.

Each business component that Siebel CRM modifies during a deep copy uses the configuration that resides on each of these business components. The parent business component includes deep copy properties for each child, and each child business component includes deep copy properties for each grandchild. This configuration is the same for deep delete.

Siebel CRM supports deep copy only for a business component that references the CSSBCBase class and that gets data from this class. The CSSBusComp class resides in the parent of the CSSBCBase class. Siebel CRM does not support deep copy for the CSSBusComp class. You can write a script or a workflow process that uses deep copy with the CSSBusComp class.

You must not use Deep Copy or Deep Copy/Delete Link with the Quote business components or the Order Entry – Orders business component. The copy functionality for these business components uses the Data Transfer Utilities business service. For more information, see *Siebel Order Management Infrastructure Guide* .

Using Deep Copy to Copy Records in Child Business Components

The Deep Copy n user property specifies a child business component. If a user chooses the Copy option, then Siebel CRM copies the records that this child business component contains. This option typically copies only one level. The Deep Copy n user property copies records in multiple levels, similar to a cascade copy. You typically use Deep Copy and Deep Delete together.

The value for this user property must contain the name of a child business component if you define the parent and child link in one of the ways that the *Copying and Deleting Child and Grandchild Records* topic describes.

You must not use Deep Copy if the parent-child relationship is a many-to-many (M:M) relationship. Instead, you can set the No Copy property to FALSE in the link that Siebel CRM uses for this parent-child relationship.

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property* and *Specifying the Link for Deep Copy and Delete* .

To use deep copy to copy records in child business components

1. In the parent business component, create the user properties for each child business component that Siebel CRM must include in the deep copy. Use values from the following table.

User Property Name	Value
Deep Copy 1	child business component name
Deep Copy 2	child business component name

2. Add a multivalue link in the parent business component for each child business component.
3. Set the No Copy property of the multivalue link to TRUE.

   This configuration prevents an error that is similar to the following from occurring:

   ```
   A Duplicate Record Exists SQL
   ```

4. Create a multivalue field in the parent business component from each child business component.

Using Deep Delete to Delete Records in Child Business Components

The Deep Delete n user property specifies a child business component. The value for this user property must contain the name of a child business component if you define a parent and child link in one of the ways that the *Copying and Deleting Child and Grandchild Records* topic describes.

If a user chooses the Delete option, then Siebel CRM deletes the records that this child business component contains. This option typically deletes records in only one level. The Deep Delete n user property deletes records in multiple levels, which is similar to a cascade delete. You typically use Deep Copy and Deep Delete together.

To use deep delete, do *Using Deep Copy to Copy Records in Child Business Components* with the following differences:

- In *Using Deep Copy to Copy Records in Child Business Components*, use Deep Delete 1 and Deep Delete 2 for the names.
- In *Using Deep Copy to Copy Records in Child Business Components*, set the No Delete property of the multivalue link to TRUE.

You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property* and *Specifying the Link for Deep Copy and Delete* .

Specifying the Link for Deep Copy and Delete

The Deep Copy/Delete Link Buscomp user property specifies the link that Siebel CRM uses for a deep copy or deep delete of the child business component. It resides in the parent business component. The value for this user property must contain the name of a link that exists between the parent business component and the child business component.

The Link object defines a one-to-many parent and child relationship that exists between these business components. For information about links, see *Configuring Siebel Business Applications* .

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

If you deactivate a predefined instance of this user property in a production environment, then thoroughly plan and test this configuration to confirm that Siebel CRM no longer copies or deletes child records, and that your configuration does not affect records from other business components that are related to these child records.

Specifying Links for More Than One Business Component

Buscomp is an optional parameter. You use it if you must specify the link for more than one business component. It must identify the business component that Siebel CRM uses as the child in a link where the current business component is the parent. You set the deep copy or deep delete user properties in the parent business component. For example, to configure Siebel CRM to do a deep copy or deep delete of the revenues that Siebel CRM associates with an opportunity, you add the Deep Copy/Delete Link: Revenue user property with a value of Opportunity/Revenue. You add this user property to the Opportunity business component. Opportunity is the parent business component and Revenue is the child business component of the Opportunity/Revenue link.

Updating the Parent Business Component if Siebel CRM Modifies Children

The OnAddAssocUpdateParent: buscompname user property updates a parent business component with the value that Siebel CRM sets in a child business component if it associates an account or contact with this child business component. The value for this user property must use the following format:

```
"Condition1", "ParentBCField1", "[ChildBCField1]"
or "Expression1", "ParentBCField2", "[ChildBCField2]"
or "Expression2", ...
```

where:

- ParentBCFieldn identifies a field that resides in the parent business component that Siebel CRM updates if it evaluates Conditionn to TRUE.
- ChildBCFieldn identifies the business component field where you set this user property. Siebel CRM uses the value of this field to update the parent business component field.

- Expressionn contains an expression that determines the value that Siebel CRM uses to update the parent business component field. An IIf statement is an example of this expression.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

For more information, see *How This Book Describes the User Property Format*.

Example of Updating the Parent Business Component if Siebel CRM Modifies Children

For example, the

```
OnAddAssocUpdateParent: Action
```

user property on the Contact business component contains the following value:

```
"[Account Id] IS NULL", "Account Id", "IIf([Account Id] IS NULL
OR [Account Id] = 'No Match Row Id','',[Account Id])"
```

If a user chooses a contact for an activity, and if Siebel CRM does not already associate an account with the parent activity, then Siebel CRM also chooses the account from the contact for the activity. If an account is associated with the contact, then Siebel CRM does not set an account for the activity.

In this example, the

```
OnAddAssocUpdateParent: Contact
```

user property that resides in the Account business component contains the following value:

```
"[Account Id] IS NULL OR [Account Id] = 'No Match Row Id'", "Account
Id", "[Id]", "Primary Address Id", "[Primary Address Id]"
```

If Siebel CRM associates an account with a contact, then it sets the primary address of this account as the primary address for the contact.

Specifying Recursive Links Between Parent and Child Business Components

The Recursive Link user property specifies a parent and child relationship between a business component and itself.

If Siebel CRM copies or deletes a record that resides in a parent business component, then the Deep Copy, Deep Delete, or Update Foreign Key Field user properties can copy or delete records that reside in child business components. If the parent and child are the same business component, then the Recursive Link user property must specify the link that defines this parent and child relationship.

The value for this user property must contain the name of a link that resides between the parent business component and itself. For example, to delete catalog subcategories if Siebel CRM deletes a category, you can use Deep Delete with the Recursive Link user property set to the following value:

```
Catalog Category/Catalog Category
```

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. No more than one instance can exist for each business component.

For more information, see *Copying and Deleting Child and Grandchild Records* and *Specifying the Parent Business Component for Accounts*.

Naming a Link

A link name uses the following format:

```
parent business component/child business component
```

This format is optional. The value that the Recursive Link user property contains might include different names on each side of the slash. For example, Action/Action - Deep. However, the parent and child business components of this link must be the same business component.

For more information about the Link object type, see *Configuring Siebel Business Applications* .

Enabling Service Request Updates in Child Business Components

The Always Enable Child: buscompname user property determines whether Siebel CRM can update a child business component of a service request after it closes this service request. It must contain a Boolean value. If TRUE, then Siebel CRM can update the child business components of a service request even if this service request is closed.

You can also modify the service request status to Open to modify a closed service request and child business component.

Enabling Service Request Updates in Child Business Components with Customer Surveys

The Always Enable Child: Customer Survey user property of the Service Request business component enables or disables customer surveys. Closing a service request does not prevent Siebel CRM from updating the child Customer Satisfaction business component. You can survey your customers even if the service request is resolved.

To allow Siebel CRM to update other business components, you can add user properties to the Service Request business component, and then substitute the appropriate business component name for Customer Survey.

Controlling Email

This topic describes business component user properties that you can use to control email. It includes the following topics:

- *Specifying Statuses for Outgoing Email*
- *Specifying the Manager That Sends Email*
- *Sending Email Packages to Recipients*
- *Responding to Email or Web Offers*

Specifying Statuses for Outgoing Email

The email activity user properties handle the status for outbound email messages.

Specifying the Status for In Progress Emails

The Email Activity Sent Status Code user property specifies the code that Siebel CRM uses in the EVENT_STATUS_LOV list of values that correspond to an outbound email that is in progress. The eMail Response client uses it to set the status of an outbound email that is in process or that is waiting for the Communications Outbound Manager or Email Manager to send this email. The value for this user property must contain a language-independent value that the EVENT_STATUS_LOV list of values contains. For example:

```
Queued
```

You must not deactivate this user property. You can modify the values for this user property. You cannot create a new instance of this user property.

Specifying the Status for Sent Emails

The Email Activity Accepted Status Code user property specifies the code that Siebel CRM uses in the EVENT_STATUS_LOV list of values that corresponds to sent outbound email. The eMail Response client uses it to set the status of an outbound email that Siebel CRM finished processing. The value for this user property must contain a language-independent value that the EVENT_STATUS_LOV list of values contains. For example:

```
Done &&
```

You must not deactivate this user property. You can modify the values for this user property. You cannot create a new instance of this user property.

Specifying the Status for Unsent Outbound Emails

The Email Activity New Status Code user property specifies the code that Siebel CRM uses in the EVENT_STATUS_LOV list of values that corresponds to an outbound email that Siebel CRM has not sent or has not processed. The eMail Response client uses it to set the status of an outbound email that Siebel CRM has not yet sent. The value for this user property must contain a language-independent value that the EVENT_STATUS_LOV list of values contains. For example:

```
Not Started
```

You must not deactivate this user property. You can modify the values for this user property. You cannot create a new instance of this user property.

Specifying the Status for Rejected Emails

The Email Activity Rejected Status Code user property specifies the code that Siebel CRM uses in the EVENT_STATUS_LOV list of values that corresponds to an unsuccessful outbound email. The eMail Response client uses it to set the status of an outbound email that Siebel CRM rejects because it cannot send this email for some reason. The value for this user property must contain a language-independent code that the EVENT_STATUS_LOV list of values lists. For example:

```
Cancelled
```

You must not deactivate this user property. You can modify the values for this user property. You cannot create a new instance of this user property.

Specifying the Manager That Sends Email

The Email Manager Compatibility Mode user property specifies how to send email messages. It must specify one of the following values:

- Y. The business component uses Mail Manager to send email messages.
- N. The Outbound Communications Manager sends email messages.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Sending Email Packages to Recipients

The recipient communications user properties send email packages. A generic recipient is a generic name for a person instead of the actual name, email address, or fax number. Service Request Owner is an examples of a generic recipient. Contact Name is another example. Siebel CRM gets values for these generic recipients from user properties, and then displays them as a list of recipients in the Pick Recipient applet.

You can configure this list of generic recipients. This configuration is similar to the set of templates that Siebel CRM lists in the Body drop-down list in the Send Email or Send Fax dialog boxes except that Siebel CRM adds recipients through child user properties.

For example, the user can choose Service Request Owner or Service Request Contact for recipients when this user creates an email or fax for a service request. For a contact record, the user might choose only Contact Name. Siebel CRM does not list the actual name in the Pick Recipient applet. Instead, it gets the name and corresponding fax number or email address from fields that reside in the current business component record. For example, a contact can include a name, email address, and a fax number.

Siebel CRM can also use a join to get the recipient information from a record that resides in another business component. For example, Siebel CRM gets recipient information for the Service Request Owner in a service request from an employee record and recipient information for the Service Request Contact from a contact record. These fields reference joins from the service request record.

Recipient First Name Field

The Recipient First Name Field user property identifies the first name of the recipient of an email, fax, or page. It specifies the name of the business component field that contains this first name.

Recipient Last Name Field

The Recipient Last Name Field user property identifies the last name of the recipient of an email, fax, or page. It specifies the name of the business component field that contains this last name.

Recipient Email Address Field

The Recipient Email Address Field user property identifies the email address of the recipient. It specifies the name of the business component field that contains this email address.

Recipient Fax Address Field

The Recipient Fax Address Field user property identifies the fax address of the recipient. It specifies the name of the business component field that contains this fax address. This address must use a format that your fax server can understand. For more information about driver parameters for the Internet SMTP/POP3 Server, see *Siebel CTI Administration Guide* .

Recipient Preferred Medium Field

The Recipient Preferred Medium Field user property identifies the communications channel that the recipient prefers for email or fax. It specifies the name of the business component field that contains the name of this channel.

If Siebel CRM uses the Only Send Preference setting for a communication request, and if the template channel type:

- Corresponds to the value that exists in the field that this user property specifies, then it sends a communications template to the recipient.
- Does not correspond to the value that exists in the field that this user property specifies, or if this user property does not exist, and if the business component includes the Preferred Communications field, then it gets the preference from this Preferred Communications field.

Recipient Id Field

The Recipient Id Field n user property specifies properties for email recipients when Siebel CRM sends an email or fax. The value for this user property contains the following items:

- ID field name. Identifies the foreign key field that resides in the parent business component that references records that reside in the joined business component.
- Business component. Identifies the joined business component.
- Label. Specifies the text for the label that Siebel CRM displays in the Pick Recipient dialog box for this generic recipient. For example:

  ```
  Service Request Owner
  ```

- Field in the target business component. You can include this optional item if the field name is not an ID field.

A comma must separate each item. For more information, see *Numbering Instances of a User Property*.

Responding to Email or Web Offers

The response type user properties specify how Siebel CRM creates new email or Web offers. You can use them with offer, email offer, and Web offer business components.

Response Type Call Back

The Response Type Call Back user property creates a Call Back response type if the user creates a new email or Web offer. If you set this user property to Y, then it creates a Call Back response.

Response Type More Info

The Response Type More Info user property creates a More Info response type if the user creates a new email or Web offer. If you set this user property to Y, then it creates a More Info response.

Response Type Unsubscribe

The Response Type Unsubscribe user property creates an Unsubscribe response type if the user creates a new email or Web offer. If you set this user property to Y, then it creates an Unsubscribe response.

Controlling Specific Siebel Business Applications

This topic describes business component user properties that you can use to control specific Siebel Business Applications. It includes the following topics:

- *Controlling Siebel Automotive*
- *Specifying Activities to Synchronize for Siebel Mobile*
- *Specifying Position Join Fields for Siebel Life Sciences*
- *Specifying Business Components for Product Selection and Pricing*
- *Identifying Business Components That Siebel Financial Services Uses*
- *Specifying Room Types for Siebel Hospitality*
- *Specifying Arrival Dates, Room Blocks, and Function Spaces for Siebel Hospitality*
- *Enabling Credit Check*
- *Specifying the Workflow Process for Credit Check*
- *Specifying Credit Card User Properties*

Controlling Siebel Automotive

This topic describes business component user properties that you can use to control Siebel Automotive. It includes the following topics:

- *Specifying Opportunity Business Components in Siebel Automotive*
- *Specifying Values for New Opportunities in Siebel Automotive*
- *Specifying Values for Used Opportunities in Siebel Automotive*
- *Specifying Opportunity Sales Steps in Siebel Automotive*
- *Specifying the Sales Step Admin in Siebel Automotive*
- *Specifying Reassignment in Siebel Automotive*
- *Specifying Positions in Siebel Automotive*

Specifying Opportunity Business Components in Siebel Automotive

The Opportunity Name user property specifies the name of the business component that Siebel CRM uses to create opportunities in a Siebel Automotive application. The value for this user property must contain the name of a business component. For example:

```
Opportunity
```

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying Values for New Opportunities in Siebel Automotive

The TypeRetailNew user property specifies the value that Siebel CRM uses in the Opportunity Type field that indicates that an opportunity is a new retail opportunity.

The CSSBCFINOppty business component class uses this user property when it calculates the Actual Number for new retail opportunities. For example, if you add the TypeRetailNew user property with a value of Retail New, then the CSSBCFINOppty class includes only the opportunities that include an Opportunity Type of Retail New.

If the TypeRetailNew user property does not exist, then Siebel CRM uses a value of New.

Siebel CRM uses this user property with Siebel Automotive.

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Specifying Values for Used Opportunities in Siebel Automotive

The TypeRetailUsed user property specifies the value that Siebel CRM uses in the Opportunity Type field that indicates that an opportunity is a used retail opportunity. The description for this user property is the same as the description for the TypeRetailNew user property except that it applies only to used opportunities. For more information, see *Specifying Values for New Opportunities in Siebel Automotive*.

Specifying Opportunity Sales Steps in Siebel Automotive

This topic describes the user properties that Siebel CRM uses to specify opportunity sales steps in Siebel Automotive.

Specifying Business Components for the Opportunity Sales Step in Siebel Automotive

The BC eAuto Sales Step user property specifies the name of the business component for eAuto Opportunity Sales Step. This business component must reference the Opportunity business object. You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Specifying How to Populate Opportunity Sales Steps in Siebel Automotive

The eAuto Enable Create Sales Step user property specifies how to populate opportunity sales steps for a Siebel Automotive application. The value for this user property must use the following format:

```
"ApplicationName", "bPopulate"
```

where:

- ApplicationName specifies the name of a Siebel Business Application.
- bPopulate is Y or N. If Y, then Siebel CRM populates the opportunity sales steps.

For example, the following code configures Siebel CRM to populate the Opportunity Sales Step for the Siebel Dealer application:

```
"Siebel Dealer", "Y"
```

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Specifying the Sales Step Admin in Siebel Automotive

This topic describes the user properties that Siebel CRM uses to specify the Sales Step Admin in Siebel Automotive.

Specifying Business Objects for the Sales Step Admin in Siebel Automotive

The BO eAuto Sales Step Admin user property specifies the name of the business object that Siebel CRM uses for eAuto Sales Step Admin. It defines the view to set for Sales Steps. You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Specifying Business Components for the Sales Step Admin in Siebel Automotive

The BC eAuto Sales Step Admin user property specifies the name of the business component that Siebel CRM uses for eAuto Sales Step Admin. This business component must reference the eAuto Sales Step Admin business object. You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Specifying Reassignment in Siebel Automotive

This topic describes the user properties that Siebel CRM uses to specify reassignment in Siebel Automotive.

Specifying the Business Component for Reassignment in Siebel Automotive

The BC Opportunity user property specifies the name of the Opportunity business component that Siebel CRM uses during reassignment in a Siebel Automotive application. This business component must reference the Opportunity business object. You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Reassigning Opportunities in Siebel Automotive

The Contact-Opportunity BC Name user property specifies the name of the business component that Siebel CRM uses to reassign an opportunity in a Siebel Automotive application. For example:

```
Opportunity
```

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Reassigning Contacts in Siebel Automotive

The Contact-Activity BC Name user property specifies the name of the business component that Siebel CRM uses when it reassigns an activity to another contact in a Siebel Automotive application. For example:

```
Action
```

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying Positions in Siebel Automotive

The BC Position user property specifies the name of a business component that stores Position data. Siebel CRM uses this business component when it creates an opportunity in a Siebel Automotive application. You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying Activities to Synchronize for Siebel Mobile

The Update Status To Synchronized Types user property determines the types of activities that Siebel CRM updates during mobile synchronization. It uses the following format:

```
,type1,type2,typeN,
```

where:

- type identifies an activity type.

For example, assume you set the Update Status To Synchronized user property to Y and the Update Status To Synchronized Types to the following value:

```
,Account Call,Professional Call,Attendee Call,
```

In this example, Siebel CRM updates the Status fields to Synchronized for activities of type Account Call, Professional Call, and Attendee Call.

A comma must prefix and suffix each activity type. For more information, see *How This Book Describes the User Property Format*.

You must also set the Update Status To Synchronized user property to Y. For more information, see *Updating the Synchronization Status for Activities*.

An activity with the Status field set to Synchronized in a Siebel Industry Application is read-only in the Activities view.

Siebel CRM supports this user property in the CSSBCFINSActivity class but not in subclasses of this class.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying Position Join Fields for Siebel Life Sciences

The Position Join Fields user property specifies the position join fields that Siebel CRM uses for an update in a Siebel Life Sciences application. The value for this user property includes one or more field names. For example:

```
"Rep Specialty", "Rep TOP", "Primary Address Id"
```

There is no limit to the number of field names you can specify.

Double quotes (") must enclose each parameter. A comma and a space must separate each parameter.

If you add a new field to this user property, then you must also create a field that includes the same name in the Pharma Professional Position business component and that references the same column that resides in the S_POST_CON table.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

For more information, see *How This Book Describes the User Property Format*.

Specifying Business Components for Product Selection and Pricing

The product selection and pricing user properties control how Siebel CRM integrates product business components with the Production Selection and Pricing (PSP) engine. The following table describes these user properties. For more information, see *Siebel Order Management Infrastructure Guide* .

User Property	Value	Description
PSP: Active	Y or N	Turns PSP integration on or off.
PSP: Buscomp Name	Business component name	Specifies the business component that instructs Siebel CRM to call the PSP engine. For example: `Internal Product PSP Integration` It is recommended that you do not modify the value for this user property.
PSP: Eligibility Fields	Business component field	Specifies the fields that the PSP Eligibility group contains. For example, you can use one of the following values: • Eligibility Reason • Eligibility Status A PSP group is a group of fields that the PSP engine populates if the same signals call these fields.
PSP: Eligibility Group	PSP group name	Specifies the name of the PSP group that calls eligibility. This value is typically Eligibility.
PSP: Eligibility Signal	Signal name	Specifies the signal name that Siebel CRM calls to populate all field values that the PSP Eligibility group contains. For example: `GetUserProdEligibility`
PSP: Enabled BO: busobjname	Y or N	Determines whether PSP is active in the business object. Siebel CRM enables PSP integration only if the following is true: • PSP: Active is Y. • PSP: Enabled BO: busobjname is Y. This configuration allows Siebel CRM to use the same product business component with multiple business objects or in a Siebel Business Application that does not use PSP.
PSP: Mode	PSP mode	Specifies the PSP Mode that Siebel CRM uses to create a PSP signal. For example: `Product` Siebel CRM uses this value as an input to the context service that determines the variable map mode.
PSP: Prepick Groups	PSP group name or names	Specifies the prepick group. You can use one of the following values: • Price • Eligibility
PSP: Price Fields	Business component field	Specifies the fields that the PSP Price group contains. For example:

User Property	Value	Description
		`Deals, List Price, and Net Price`
PSP: Price Signal	Signal name	Specifies the signal name that Siebel CRM calls to populate all field values that the PSP Price group contains. For example: `GetUserProdPrice`

Using the Product Selection and Pricing User Properties

You can use the product selection and pricing user properties with a product business component that references the CSSBCPecBase class or subclass, such as CSSBCProdBuyNow. For example, assume Siebel CRM must use the GetProdEligibility signal to populate the Eligibility Status and Eligibility Reason fields, but only in the Order Entry business object. The following table describes the user properties that you can add that configures this example. You add them to the following business component:

Internal Product by Price List Optional 2

User Property	Value
PSP: Active	Y
PSP: Buscomp Name	Internal Product PSP Integration
PSP: Eligibility Fields	Eligibility Reason, Eligibility Status
PSP: Eligibility Group	Eligibility
PSP: Eligibility Signal	GetProdEligibility
PSP: Enabled BO: Order Entry	Y
PSP: Mode	Product
PSP: Prepick Groups	Eligibility

Identifying Business Components That Siebel Financial Services Uses

The WorkFlow Behaviour user property identifies a business component that the Siebel Financial Services application uses. It can include one of the following values:

- Y. Use this business component in a Siebel Financial Services application.

- Empty or this user property does not exist. Do not use this business component in a Siebel Financial Services application.

This user property helps the Workflow Process Object Manager to identify a Siebel Financial Service application from other types of Siebel Industry Applications.

Siebel CRM supports this user property for use in the CSSBCFINSActivity class, but not in the subclasses of this class. It does support this user property for custom configuration.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying Room Types for Siebel Hospitality

The RBFields user property specifies fields that reside in the Room Block business component that represent types of rooms. The value for this user property includes the names of fields that exist in the Room Block business component. For example:

```
RB Single, RB Double, RB Triple, RB Quad, 100
```

A comma must separate each field. An integer must terminate the value. It indicates the sum of the values for the specified fields. The integer is typically 100.

You can modify the value for this user property and create a new instance of it. You cannot deactivate this user property. For more information, see *How This Book Describes the User Property Format*.

Specifying Arrival Dates, Room Blocks, and Function Spaces for Siebel Hospitality

The day and number user properties define day and number values.

Specifying the Arrival Date Field for the Day Number Business Service

The Day Number: Arrival Date Field user property specifies the name of the Arrival Date field that Siebel CRM uses in the Day Number business service. If the user modifies the value of this field, then this business service sends this modification to the date fields that reside in the Function Space and Room Block business components.

You can modify the value for this user property. You cannot deactivate or create a new instance this user property.

Specifying the Business Component for the Function Space

The Day Number: Function BC Name user property specifies the name of the business component that Siebel CRM uses for the Function Space. Siebel CRM uses it with the Day Number: Arrival Date Field user property. For more information, see *Specifying the Arrival Date Field for the Day Number Business Service*.

You can configure Siebel CRM to modify the value for this user property, but not to deactivate it or to create a new instance of it.

Specifying the Business Component for the Room Block

The Day Number: Room Block BC Name user property specifies the name of the business component that Siebel CRM uses for the Room Block. Siebel CRM uses it with the Day Number: Arrival Date Field user property. For more information, see *Specifying the Arrival Date Field for the Day Number Business Service*.

You can configure Siebel CRM to modify the value for this user property, but not to deactivate it or to create a new instance of it.

Enabling Credit Check

The Credit Check user property enables or disables Credit Check during verification. It must contain one of the following values:

- Y. Do credit check.
- N. Do not do credit check.

You can configure Siebel CRM to deactivate this user property or modify the value for it, but not to create a new instance of it.

Specifying the Workflow Process for Credit Check

The Credit Check Workflow user property specifies the name of the workflow process that Siebel CRM uses if Credit Check is enabled. For example, Credit Check – Quotes. If you set the Credit Check user property to Y, then the Credit Check Workflow user property is required.

You can configure Siebel CRM to deactivate this user property only if you set the Credit Check user property to N. You can modify the value for this user property. You cannot create a new instance of it.

Specifying Credit Card User Properties

The following credit card user properties store information in the Mod 10 (LUHN) algorithm for credit card validation:

- *Credit Card Expired Month*
- *Credit Card Expired Year*
- *Credit Card Number*
- *Credit Card Type*

These user properties are valid only:

- For a business component that references the CSSBCBase class or that gets data from a class that references the CSSBCBase class, such as CSSBCQuote.
- With the Validate method of the Credit Card Transaction Service business service. This is an exception to the typical user property behavior of the specialized business component class. For important caution information, see *Using Specialized Classes*. For more information about payment validation, see *Siebel Order Management Guide* .

All four of the fields that these user properties reference must contain data to allow validation.

Credit Card Expired Month

The Credit Card Expired Month user property stores the expiration month of the credit card.

Credit Card Expired Year

The Credit Card Expired Year user property stores the expiration year of the credit card.

Credit Card Number

The Credit Card Number user property stores the credit card number.

Credit Card Type

The Credit Card Type user property stores the credit card type.

Doing Other Work

This topic describes business component user properties that you can use to do other work. It includes the following topics:

- *Specifying the Application Name*
- *Using Aspects to Control Read Only, Insert, and Other Behavior*
- *Specifying the Default Bookmark View*
- *Enabling the Dispatch Board*
- *Making Sure an Attachment File Exists*
- *Enabling the Revise Button According to Conditions*
- *Specifying Joins to the S_PARTY Table*
- *Specifying the DB2 Optimization Level for SQL Statements*
- *Capturing User Drilldown Behavior*

Specifying the Application Name

The Application Name user property specifies the name of the application. It must reference a valid application name.You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it.

Using Aspects to Control Read Only, Insert, and Other Behavior

An aspect determines how Siebel CRM displays data from a business component. You can use one of the aspect user properties to configure business component behavior according to the applet that Siebel CRM uses to display data from this business component. For example, the applets that reference the Action business component might contain different predefault values for the Type field. An aspect user property is optional.

Aspect User Properties for the CSSBCBase Class

If Siebel CRM sets an aspect for an applet that references the CSSBCBase class, then it modifies the behavior of this class according to the following user property setting. These settings assume the current aspect is Aspect and the value of Field Name is Y:

- Aspect BC ReadOnly: Aspect. The current record becomes read-only.
- Aspect Child BC ReadOnly: Aspect. The child business components of the current record become read-only.
- Aspect BC NoInsert: Aspect. The user cannot insert a new record. You must make sure that Siebel CRM does not modify the

  `[Field Name]`

  value if the user steps off the record. If it does modify this value, then the behavior in the client might confuse the user. An incorrect configuration makes an insert that depends on the state of the current record. This configuration is probably not what your implementation requires.
- Aspect Default Value: Aspect. If you define Aspect Default Value: Aspect for a business component field, and if the current aspect is Aspect, then the predefault value for this field becomes the expression that the value of the user property defines. For example, the Action business component handles activities. If it includes a Planned field, and if you define the Aspect Default Value: Planned field user property for this field, and if the value of this user property is Timestamp(), then the predefault value for the planned start date and time of the activity becomes Timestamp().

You cannot use Aspect Default Value with a multivalue field because a multivalue field does not use a predefault value.

The following table lists the aspect user properties that you can use with a business component.

User Property Name	Value
Default Aspect	Aspect
Aspect BC ReadOnly: Aspect	Field Name
Aspect Child BC ReadOnly: Aspect	Field Name
Aspect BC NoInsert: Aspect	Field Name

The following table lists the aspect user properties that you can use with a field.

User Property Name	Value
Aspect Default Value: Aspect	Expression

Aspect User Properties for the CSSSWEFrame Base or CSSSWEFrameListBase Class

You must configure Siebel CRM to set and send the aspect name to the business component that the view references in the following situations. This business component uses the CSSSWEFrameBase or CSSSWEFrameListBase class:

- You define a View Aspect* user property for the current view.

- You do not define View Aspect* for the current view but you do define the Default Aspect.

The following table lists the aspect user properties that you can use with a view.

User Property Name	Value
View Aspect: View Name	Aspect Name
View Aspect	"View Name", "Aspect Name"
View Aspect 1	"View Name", "Aspect Name"
View Aspect 2	"View Name", "Aspect Name"
Default Aspect	Aspect Name

Specifying the Default Bookmark View

The Default Bookmark View user property specifies the default view that Siebel CRM uses to access a business component when it creates a bookmark for this business component. The value for this user property must contain the name of a view, not enclosed in quotes.

The Communications Server uses this user property to create a bookmark when it sends a package, and if the Attach Bookmark field of this package contains a check mark. For example, this user property exists on the predefined Opportunity business component that the Opportunity List View references. Assume the Communications Server creates an email message, and that a bookmark that references an opportunity record is attached to this message. If the user clicks this bookmark, and if the responsibility that this user uses includes this view, then Siebel CRM displays the linked record in the Opportunity List View. For more information about bookmarks, see *Siebel CTI Administration Guide* .

You can configure Siebel CRM to modify the value for this user property, create a new instance of it, or deactivate it. No more than one instance can exist for each business component.

Enabling the Dispatch Board

The Enable Dispatch Board user property enables the Dispatch Board views that reference the business component that contains this user property. The value for this user property must contain one of the following values:

- TRUE. Enable the Dispatch Board views that reference this business component.
- FALSE or this user property does not exist. Disable the Dispatch Board views that reference this business component.

You can modify this user property. You cannot deactivate or create a new instance of this user property.

For more information, see *Siebel Field Service Guide* .

Making Sure an Attachment File Exists

The FileMustExist user property determines whether a file must already exist before the user can add it as an attachment. The value for this user property must contain a Boolean value. If TRUE, then the file must already exist before the user can add it as an attachment.

Enabling the Revise Button According to Conditions

The Revision Condition n user property enables the Revise button that Siebel CRM displays in a list applet.

The following table describes typical values for this user property. In this example, if the Active flag is Y and the Order Status is Open, then Siebel CRM enables the Revise button.

User Property	Value
Revision Condition 1	"Active", "Y"
Revision Condition 2	"Status", LookupValue("FS_ORDER_STATUS","Open")

Using the Revision Condition User Property

In this example, you configure Siebel to enable the Revise button if the status is Open or Failed.

To use the Revision Condition user property

1. Add a new calculated field using values from the following table.

Property	Value
Name	Status Rev
Calculated Value	IIf([Status]=LookupValue("FS_ORDER_STATUS","Open") OR [Status]=LookupValue("FS_ORDER_STATUS","Failed"), "Y", "N")

2. Modify the Value property of the Revision Condition 2 user property to the following value:

```
"Status Rev", "Y"
```

Specifying Joins to the S_PARTY Table

The Inner Join Extension Table n user property specifies a table. The value for this user property must contain the name of a table, not enclosed in quotes. This table must be an extension table of the S_PARTY table. Siebel CRM uses an inner-join to join this table to the S_PARTY table. Some business components use the Siebel Party Model to control access and visibility. For example, organization, account, and position. These business components use one or more inner joins to the base S_PARTY table.

If you create a new business component that references the Siebel Party Model, then you must use the Inner Join Extension Table n user property to define one or more tables that Siebel CRM implicitly joins to the S_PARTY base table. For example, to configure visibility for a group that does not fit any of the predefined Siebel Party Model business components, you might need to create a new business component.

You must not deactivate this user property or modify the value. You can create a new instance of this user property, if necessary. You can specify this user property with or without the numeric suffix. For more information, see *Numbering Instances of a User Property*.

CAUTION: You must be careful if you use the S_PARTY table in a custom configuration. For more information, see *Configuring Siebel Business Applications* .

Numbering Instances of the Inner Join Extension Table User Property

If you add multiple Inner Join Extension Table n user properties to a business component, then you can append a value to this user property. The lowest value indicates the primary extension table. For example, the predefined Employee business component includes the following user properties:

- Inner Join Extension Table 1 includes a value of S_CONTACT.
- Inner Join Extension Table 2 includes a value of S_USER.
- Inner Join Extension Table 3 includes a value of S_EMP_PER.

In this example, S_CONTACT is the primary extension table. For more information, see *Numbering Instances of a User Property*.

Specifying the DB2 Optimization Level for SQL Statements

The DB2 Optimization Level user property modifies the optimization level that Siebel CRM uses for the SQL statements that a business component creates. The value for this user property must contain an integer that indicates the level of optimization that Siebel CRM uses. The DB2 connector uses an optimization level of 3 for each client SQL statement.

CAUTION: The value that you use for the DB2 Optimization Level user property affects the entire business component. Modifying it can adversely affect the performance of other SQL statements that this business component creates. It is extremely important that you analyze SQL statements that Siebel CRM performs slowly, and that you use other tuning options before you modify the DB2 Optimization Level user property.

To specify the DB2 optimization level for SQL statements

1. Use other tuning options:

- Make sure an index exists that addresses the needs of the WHERE conditions and the ORDER BY clause on the tables that Siebel CRM uses in the query.
- Remove one or more columns from the ORDER BY clause.
- If the business component is customized, then simplify this customization.

2. Analyze performance.

   You can use the
   `/s <filename>`

   option when you start the client. This option causes Siebel CRM to log all SQL statements. This log file includes the time that Siebel CRM spends to run each SQL statement. You can use it to identify the statements that run slowly. Note that the DB2 SQL generator adds the following clause to the end of the SQL statement. This clause does not display in the SQL log:

   ```
   optimize for 1 row
   ```

3. If a DB2 Optimization Level user property already exists on the business component that creates the SQL statement, then examine this optimization level to determine if it causes the slow SQL query.
4. Paste the suspected slow query into one of the explain utilities, add the following clause, and then set the optimization level to the appropriate value:

   ```
   optimize for 1 row
   ```

5. Create a query plan for the statement, and then analyze it. If you conclude that modifying the optimization level is the best way to improve query performance, then use a different optimization level.
6. If the new optimization level fixes the slow query, then add the user property to the business component.

Capturing User Drilldown Behavior

You can use the business component user properties that this topic describes to capture user drilldown behavior so that Siebel CRM can store values for the business component fields where the drilldown occurs. It can store these values in an attribute in a user profile, which is a type of attribute that Siebel CRM creates at run time to allow it to modify the Siebel application behavior in reply to a user action. It can store one business component field for each of these attributes. For more information about these attributes, see the topic about the SetProfileAttr method for an application in *Siebel Object Interfaces Reference* , and the topic about dynamic user profile attributes in *Siebel Personalization Administration Guide* .

Example of Capturing User Drilldown Behavior

In this example, the Com Invoice Profile comes predefined with Siebel CRM starting with Siebel CRM release 8.1.1.10. It tracks the parent Account Id when the user navigates away from the Account Summary View. This view displays the following information:

- Account details in a form applet that references the CMU Com Invoice Profile business component
- Invoice profiles in a list applet that references the Com Invoice Profile business component

These business components reference the same database table, but no link exists that Siebel CRM can use that allows the CMU Com Invoice Profile business component to access the Account business component. Assume your

implementation must get billing details from an external system when the user drills down on a billing profile. To support this requirement, Siebel CRM must send an integration object message that includes the following data:

- Data from the CMU Com Invoice Profile business component, including values for the Invoice Profile Name field and the Account Id field that Siebel CRM uses as key fields to get billing information for the SOAP and HTTP Web service call. This billing information includes invoices, payment adjustments, balance, and so on.
- The Account Id of the account that Siebel CRM displays in the Account Summary View when the user drills down on the Profile Name field of the business component record that Siebel CRM displays in the Com Invoice Profile list applet.

Siebel CRM includes the following predefined objects to capture this Account Id:

1. Adds the Profile Name drilldown object to the CMU Com Invoice Profile List Applet. The View property of this drilldown object references the CMU Billing Invoice View. The business component property of this applet references the Com Invoice Profile business component.
2. Adds the following user properties to the Com Invoice Profile business component.

Name	Value
DrilldownObject0	Profile Name
Profile Name:ProfileAttributeName1	Service Account Id
Profile Name:ProfileAttributeName2	Service Account
Profile Name:ProfileAttributeValue1	Account Id
Profile Name:ProfileAttributeValue2	Account Name

ProfileAttributeValue1 and ProfileAttributeValue2 each provide the name of a business component field. In this example, ProfileAttributeValue must contain the name of a business component field that currently exists. ProfileAttributeName can contain a text string.

3. Adds the following fields to the CMU Com Invoice Profile business component:

Name	Calculated Value
Service Account	GetProfileAttr("Service Account") Siebel CRM uses the value of the ProfileAttributeName2 profile defined in step 2 to calculate the Service Account.
Service Account Id	GetProfileAttr("Service Account Id") Siebel CRM uses the value of the ProfileAttributeName1 profile defined in step 2 to calculate the Service Account Id.

Drilldown Object User Property

The DrilldownObject n user property identifies the name of a drilldown object. This drilldown object resides in an applet. It references a business component.

The following table describes typical values for this user property.

User Property	Value
DrilldownObject0	Name of the drilldown object. For example: `Profile Name`

Profile Name: attributename User Property

The Profile Name: attributename user property identifies the name of the profile attribute that Siebel CRM sets when the user clicks a drilldown object.

The following table describes typical values for this user property.

User Property	Value
Profile Name:ProfileAttributeName1	Name of the profile attribute. For example: `Service Account Id`

Profile Name: attributevalue User Property

The Profile Name: attributevalue user property identifies the name of a business component field. Siebel CRM sets the value for this field according to the results of the drilldown.

The following table describes typical values for this user property.

User Property	Value
Profile Name:ProfileAttributeValue1	Value of the profile attribute. For example: `Account Id`

7 Siebel Web Engine Tags

Siebel Web Engine Tags

This chapter describes Object Definition (OD) tags. It includes the following topics:

- *About OD Tags*
- *Applet Tags*
- *Form and Web Page Tags*
- *Frame Tags*
- *Navigation Control Tag*
- *Program Logic Tags*
- *Referential Tags*
- *Threadbar Tags*
- *Togglebar Tags*
- *Toolbar Tags*
- *Tree Tags*
- *View Tags*
- *Tags That Support a Specific Feature*
- *Tags That Are for Oracle Internal Use Only*

About OD Tags

An Object Definition (OD) tag is an HTML tag that you can insert in a Siebel Web Template. It specifies how to format and display a repository object that resides in an HTML page in the client. For more information, see *Configuring Siebel Business Applications* .

An OD tag includes the following prefix:

```
od-
```

For brevity, this chapter includes this prefix only in the format description and code example.

Applet Tags

This topic describes tags that you can use to configure how OD displays an applet. It includes the following topics:

- *Applet Tag*
- *Applet Layout Tag*

- *Control Tag*
- *Form Applet Layout Tag*
- *Master and Detail Applet Tags*
- *Select Row Tag*

Applet Tag

The applet tag references an applet that OD displays in a view. It uses the following format:

```
<div od-type="applet" id="1" var="Parent"/>
```

where:

- id.References an applet that uses the View Web Template Item list.
- var. Allows you to use a variable in the applet template that configures the <div od-if="Context, <>"> tag to conditionally display HTML. For example, you can use the applet tag to display the Applet Title in the applet template only if the applet is a top (highest level) applet.

You can use the applet tag only in a view Web template.

Applet Layout Tag

The applet layout tag controls the layout of an applet. You can use it to determine the HTML content that SWE displays according to the current view layout mode and layout preferences. It uses the following format. You must specify at least one attribute:

```
 <div od-type="layout" viewDisplayMode="view_mode"
appletDisplayMode="applet_mode" appletDisplaySize="size"/>
```

where:

- viewDisplayMode. Optional. You can use one of the following values:
  - Layout. OD displays the tag only if Siebel CRM is in Edit View Layout mode.
  - Show. OD displays the tag only if Siebel CRM is not in Edit View Layout mode.

  If you do not include the viewDisplayMode attribute, then OD displays the tag regardless of the Edit View Layout mode.
- appletDisplayMode. Optional. You can use one of the following values:
  - Show. OD displays the tag only if the applet is visible.
  - Hide. OD displays the tag only if the applet is hidden.

  If you do not include the appletDisplayMode attribute, then OD displays the tag regardless of applet visibility.
- appletDisplaySize. Optional. You can use one of the following values:
  - Min. OD displays the tag only if the applet is minimized.
  - Max. OD displays the tag only if the applet is maximized.

  If you do not include the appletDisplaySize attribute, then OD displays the tag regardless of applet display size.

Control Tag

The control tag provides a placeholder in an applet Web template for a control or list column. It uses the following format:

```
<div od-type="control" id="1" property="property_name"/>
```

where:

- id. Maps a child applet, control, or list column to this placeholder tag.
- property. Optional. If you include this attribute, then it identifies the property of the control or list item that OD displays on the Web page.

You can use this tag only in an applet Web template of type Base, Edit, New, or Query.

You cannot nest the control tag. For example, SWE does not support following usage:

```
<div od-type="control" id = "1"> <!--the "parent" control
<div od-property="displayname"/>
<div od-property="FormattedHtml"/>
<div od-type="control" id = "2" property="formattedHtml">
<!-- A child control gets context or gets properties from its "parent>
<!--od section control close-> <!--End of parent -->
```

Defining the Property Attribute of the Control Tag

The following table describes the values that you can use for the property attribute. You can use this attribute only in a singleton tag. A singleton tag is a tag that does not include a required end tag.

If you do not include this attribute, then:

- This tag displays the body only if the ID attribute maps the control ID.
- You can use the following tag to display this user property in the body of the control tag:

```
od-property
```

Value	Description
FormattedHtml	Displays the data for a control or list item in HTML.
DisplayName	Displays the caption property of the control or list item.
ListHeader	Displays a column header for a list column that includes links that the user can use to sort the column. You can use this value only with a control tag that Siebel CRM maps to a list column that resides in the Base template of a list applet.
RequiredIndicator	Displays an icon if the control is required. For example, assume the user must enter a value for the control before Siebel CRM can save the record to the database. The RequiredIndicator parameter that resides in the OD section of the application configuration file identifies this icon.

Form Applet Layout Tag

The form-applet-layout tag contains the controls that reside in the main body of a form applet. It uses the following format:

```
<div od-type="form-applet-layout">
<!--od section form-applet-layout close-->
```

This tag does not include any attributes. You cannot use the idgroup tag in this template. For more information, see *Map Siebel Object to OD Tag*.

Master and Detail Applet Tags

The and tags display a view that includes master and detail applets. This view is similar to the layout that a catalog uses. SWE can interweave the records that it displays in these applets instead displaying only master records in the master applet and only detail records in the detail applet.

You can configure the master and detail applets as list applets to create a layout that is similar to a catalog. To define a relationship between these applets, you can use the Position attribute of the view web template item. This attribute is similar to the Position attribute of a tree node:

- The master applet uses a first-level position value, such as 1 or 2.
- A child applet uses a second-level position value, such as 1.1 or 1.2.
- A grandchild applet uses a third-level position value, such as 1.1.1 or 1.1.2.

SWE can display more than one set of master and detail relationships in a view where more than one master applet can exist.

Siebel CRM only maps the master applets to the applet tags that the view template contains. It does this mapping in the view web template item. It does not assign IDs to the other applets that the view web template item contains. It specifies the layout of nonmaster applets in the applet template of the master applet. It does not specify this layout in the view template.

Siebel CRM supports this layout only for an applet that is in base mode.

Example of Using Master and Detail Applet Tags

In the example that this topic describes, assume a master and detail view includes the Category Items List Applet as the master applet and the Sub Category Items List Applet as the detail applet. The following table lists the view web template items that this view uses.

New Identifier	Applet	Applet Mode	Position
101	Category Items List Applet	Base	1
	Sub Category Items List Applet	Base	1.1

The base template for the Category Items List Applet contains the following code:

```
<table>
<div od-iterator="row">
<tr>
 <td>
 <div od-type=control id ="5001" /> </td><!-- field value similar to "Small Business" -->
 <td>
 <div od-iterator=childIterator>
 <div od-type=child-applet> <!-- Display the child applet-->
 <!--od section child-applet close->
 </td>
</tr>
<!--od section iterator close->
</table>
```

The base template for the Sub Category Items List Applet contains the following code:

```
<table><tr>
<div od-iterator="row">
<td>
<div od-type=control id="5001"/> </td><!-- field value similar to "Desktop" -->
<!--od section iterator close->
</tr></table>
```

Iterate Child Applets Tag

The tag iterates each of the child applets that Siebel CRM defines for this applet according to the position value of the view web template that resides in the view that references this applet. It uses the following format:

```
<div od-iterator=childIterator>> ..... <!--od section iterator close->
```

SWE can use this tag only in the base template of an applet. If the applet does not contain a child applet, then SWE ignores this tag.

Child Applet Tag

The child-applet tag places a child applet in a parent applet. The base template of this child displays the child at the point where SWE places this tag.

The child-applet tag uses the following format:

```
<div od-type=child-applet/>
```

You can set the HTML Number of Rows property of the Sub Category Items List Applet to the number of values that SWE must display in each category.

You must configure the appropriate drilldown objects to allow the user to drill down from the category and subcategory values.

Select Row Tag

The select-row tag displays check boxes in a multiselect list applet. This applet allows the user to choose multiple items for a transaction. To make these choices, the user clicks the check boxes that SWE displays in the first column.

This tag uses the following format:

```
<div od-type=select-row property="FormattedHtml"/>
```

where:

- property. If the applet is enabled for multirecord selection in Siebel Tools, and:
  - If you set the property attribute to FormattedHtml in the select-row tag or in this tag, then SWE displays the check box. For more information, see *This Tag*.
  - If you do not include the property attribute, then SWE displays the body of this select-row tag.

For example:

```
<div od-type=select-row property="FormattedHtml"/>
```

For example:

```
<div od-type=select-row>
 <div od-property="FormattedHtml"/>
<!--od section select-row close-
```

You can set the HTML Multi Row Select property of the list object of the applet to TRUE to enable multirecord selection in Siebel Tools.

Using the Select Row Tag

You can use the select-row tag to create a generic list applet template that SWE can use with a list applet that does or does not support multirecord selection in the following locations:

- In the list header. You can use the select-row tag to conditionally add a td tag for the header for the row selection check box column.
- In the list body. You can use the select-row tag with the this tag to conditionally add a td tag that contains the check box.

You must place list applet controls and list columns in a form tag when you enable multirecord selection. Any method that resides on the applet requires that SWE submit the form that contains the row selection check boxes. For more information, see *Form Tag*.

If the user chooses multiple records, then Siebel CRM does not disable a control that does not support calling a method. This situation occurs because Siebel CRM does not call the Siebel Server if the user chooses multiple records. Instead, if the control is activated, then Siebel CRM sends a message to the user that states that it cannot do the action if multiple records are chosen.

How the Select Row Tag Positions the Current Record

The select-row tag positions the current record differently than how the PositionOnRow control positions this record. A single list applet can contain the PositionOnRow control and the Multiple Row Selection. Siebel CRM chooses the record where the business component is currently positioned when the user navigates to a list applet. The user can use the check box to remove the check mark for this record.

Unlike PositionOnRow, no round trip occurs to the Siebel Server when the user uses a check box to choose rows. Siebel CRM identifies the records as chosen on the business component only if it calls a method that resides on the applet. The user can choose records across multiple pages. The user can use the Next and Previous controls and can also choose records from different working sets.

How the HTML Client Framework Chooses Records

If Siebel CRM calls a method that resides on an applet, then the HTML Client framework sets the chosen records in the business component. This configuration occurs in the PrepareToInvokeMethod method before it calls the

DoInvokeMethod method. These methods reside in the CSSSWEFrame class. Siebel CRM does the following work when the framework uses a command to call a method that resides on an applet:

1. Positions the parent business component of the applet, if it exists, on the correct records.
2. Positions the business component that the applet references in the currently active record, if necessary.
3. If Siebel CRM identifies multiple records, then it calls the SelectRowById method of the CSSBusComp class to choose these records in the business component.
4. To call the method on the applet, Siebel CRM calls the DoInvokeMethod method of the CSSSWEFrame class.

The CSSSWEFrame class does not include any methods that support multiple records. If a specialized applet supports this feature, then the DoInvokeMethod method must be specialized. The DoInvokeMethod method calls the IsMultiRecSelected method of the CSSSWEFrame class to determine if multiple records are chosen. If TRUE, then it calls the EnumAllSelections of the CSSBusComp class to get all the records that are currently chosen in the business component. For important caution information, see *Using Specialized Classes*.

Form and Web Page Tags

This topic describes tags that you can use to configure how SWE displays a form and how it uses a web page. It includes the following topics:

- *Form Tag*
- *Web Page Item Tag*

Form Tag

The form tag creates an HTML form that allows the user to input information. It uses the following format:

```
<div od-type=form name="form_name" htmlAttr="attribute_names"> ... <!--od section form close->
```

where:

- name.Optional. Specifies the HTML form name. If not specified, then SWE uses a name that it creates internally.
- htmlAttr. Optional. The value for this attribute must contain the names of valid attributes that the HTML form tag contains. SWE applies these attributes to the HTML form that it creates. You cannot use the following values:
  - method
  - name
  - action

Web Page Item Tag

The pageitem tag provides a placeholder in a web page for a web page item. It uses the following format:

```
<div od-type=pageitem id="1" property="FormattedHTML"/>
```

where:

- id. Identifies a web page item.

- property. Optional. Identifies the property of the Web page item that SWE displays on the Web page. You can use this attribute only in a singleton tag.

  You can use one of the following values.

  - FormattedHtml. Display the data for the Web page item in HTML.
  - DisplayName. Display the caption property of the Web page item that the repository contains.

  If you do not include the property attribute, then:

  - SWE displays the body only if the Web page item ID is mapped.
  - SWE can use the this tag to display the property in the body of the pageitem tag. For more information, see *This Tag*.

You can use this tag only in a Web page.

Frame Tags

This topic describes tags that you can use to configure how SWE uses frames. It includes the following topics:

- *Frame Tag*
- *Frameset Tag*

The frame tags allow SWE to control how it refreshes URLs. You can use them in the following situations:

- Container page template. Creates the frame definition document for SWE. Note the following:
  - It is recommended that you define the contents of the frame that uses the include tag, but it is not required. You can place these contents in the body of the frame tag. For more information, see *Include Tag*.
  - The contents of the frame tag must include the entire HTML document. It must include the HTML document structure tags, such as the html, head, and body tags, and so on. This content must include the view templates.
  - If the type is View, then the contents of the frame tag must contain only the current-view tag. For more information, see *Current View Tag*.
- View template. Used in a View template to create a frame definition document that displays the applets that the view contains. SWE refreshes these frames only if one or more of these applets contains new data. Note the following:
  - SWE can use a frame in a View template only if it also uses this frame in the container page, and only if a separate frame exists in the container page for the View.
  - If you place an applet in a frame, then you must make sure that Siebel CRM maps at least one applet tag in this frame to an applet. If you do not do this, then an empty frame might occur. For more information, see *Applet Tag*.
  - If a frame tag contains an applet tag, then you must set the type attribute of this tag to Applet.

Frame Tag

The frame tag identifies the beginning and end of the contents that SWE places in a frame. SWE displays this tag as an HTML frame tag, with the src attribute of this tag set to a SWE URL that gets the contents of the frame.

The frame tag uses the following format:

```
<div od-type=frame type="frame_type" name="frame_name">
.... <!--od section frame close-->
```

where:

- type. Identifies the frame type. SWE uses this information to determine when to refresh this frame. You can use one of the values that the following table describes.

Value	Description
Screenbar	In a container page template, specifies that the frame contains the primary tab bar.
Viewbar	In a container page template, specifies that the frame contains Siebel CRM menus, a visibility drop-down list, and a search drop-down list.
View	In a container page template, specifies that the frame contains the current view that includes the content area.
Page	In a container page template, specifies that the frame contains a Web page. SWE does not refresh these frames after initial loading.
Applet	In a View template, specifies that the frame contains an applet.
Content	Creates a frameset that includes view frames. It supports how Siebel CRM displays multiple views in some features, such as Search Center. The Content frame typically includes a frameset that contains only the View frame. Other content frames can include framesets that include two or more frames, the View frame, and frames that display other views, such as the Search View.
AltView	Configures subframes to display one or more alternate views in the content frame, such as Search Center, in addition to the view in the View frame.

- name. Optional. Specifies a name for the frame. You can use this attribute only if the type of the frame is Page. SWE creates a typical name for other frame types.

You must place the frame tag in the body of the frameset tag.

SWE can support a nested frameset where:

- The frame tag contains a frameset tag.
- the Type attribute of the outer frame tag is Page.

Frameset Tag

The frameset tag defines the set of frames that the document contains. It uses the following format:

```
<div od-type=frameset htmlAttr="attribute_names"> ... <!--od section frameset close-->
```

where:

- htmlAttr. Specifies the attributes for the HTML frameset tag.

SWE displays the frameset tag as an HTML frameset tag. The body of the frameset tag can only contain frame tags.

Navigation Control Tag

The nav-control tag implements navigation control. It uses the following format:

- Screenbar that first-level navigation uses:

  ```
  <div od-type=nav-control type="Screen With Category" style="Tab" indentWidth="integer"/>
  ```

- Drop-down list that second-level navigation uses:

  ```
  <div od-type=nav-control type="Category View" style="Select"/>
  ```

- Detail view that third-level navigation uses:

  ```
  <div od-type=nav-control type="type" style="Tab" indentWidth="integer" anchorTab="Enabled or Disabled"/>
  ```

where:

- type, style. Specifies the type and style. You can use the values that the following table describes.

Type	Style	Description
Category View	Select	Displays a visibility dropdown list. Applies to visibility control.
Detail Category	Tab	Displays view navigation control that includes category tabs but no links after the tabs. Applies to separate view and subview navigation control.
Detail Category View	Tab	Displays subview navigation control that includes view tabs. Applies to separate view and subview navigation control.
Detail Category With View	Tab	Displays view navigation control that includes category tabs and a set of links after the tabs. Applies to view navigation control.

Type	Style	Description
Screen With Category	Tab	Displays screen tabs that includes category links after the tabs. Applies to view navigation control.

- indentWidth. Specifies the number of pixels to indent the row of tabs. Applies to screen and detail view tabs.
- anchorTab. Enables or disables smart view anchoring.

First-Level Navigation Example

The CCScreenbar_Tabs template includes the following code:

```
<div od-if condition="Web Engine State Properties, IsHighInteractive">
 <div od-switch>
 <div od-case condition="Web Engine State Properties, IsHtmlMarkup">
 <div od-type=nav-control type="Screen With Category" style="Tab"
indentWidth="8"/>
 <!--od section case close->
 ...
 <!--od section switch close->
<!--od section if close->
```

Second-Level Navigation Example

The CCFormButtonsTop template includes the following code:

```
<div od-if="Context, Parent">
 <div od-if condition="Web Engine State Properties, IsHighInteractive">
 <div od-switch>
 <div od-case condition="Web Engine State Properties, IsViewPosition,'Position:2'">
 <td><img src="images/spacer.gif" width="1"height="1"></td>
 <td class="AppletTitle" nowrap>
 <div od-type=nav-control type="Category View" style="Select"/>
 </td>
 <!--od section case close->
 ...
 <!--od section switch close->
 </!--od section if close->
</!--od section Parent close->
```

Third-Level Navigation Example

The CCViewbar_Tabs_DropList template includes the following code:

```
<div od-if condition="Web Engine State Properties, IsHighInteractive">
 <div od-switch>
 <div od-case condition="Web Engine State Properties, IsHtmlMarkup">
 <div od-switch>

 <div od-case condition="Web Engine State Properties, IsViewPosition, 'Position:3'">
```

```
 <table class="tier3Back" width="100%" align="center" cellpadding="0" cellspacing="0" border="0"><tr
 valign="top"><td><img src="images/spacer.gif" width="1" height="3"></td></tr></table>

 <div od-type=nav-control type="Detail Category With View" style="Tab" indentWidth="30" anchorTab="Enabled"/
>
 <!--od section case close->
 <!--od section switch close->
 <!--od section case close->
 <!--od section switch close->
 ...
<!--od section if close->
```

Support for the Navigation Control Tag Across Siebel CRM Versions

This book describes support for the nav-control tag starting with Siebel CRM version 7.7. Before Siebel CRM version 7.5.3.6, if a user action or navigation causes Siebel CRM to refresh the current view or to display a new view, then it anchors the result at the start of the page, by default. This behavior might disorient the user in some situations. For example, assume the user clicks a view tab to navigate to a new view and this user expects that Siebel CRM will display detail information, such as attachments, in the ending part of the target view. Assume the user views the lower part of a view where the parent applet uses more than a full window height. In this situation, the user must scroll to display the view details.

Starting with Siebel CRM version 7.5.3.6 in high interactivity mode:

- The smart view anchoring feature solves these problems. It anchors and adjusts the scroll position in a view after the user does something that causes Siebel CRM to modify or refresh a view. For example, if the user clicks a view tab, then Siebel CRM does not modify the location where it displays this tab.
- Siebel CRM enables view anchoring, by default. You can disable this behavior for third or fourth level view navigation that the user starts when the user clicks a view tab. To do this, you set the anchorTab property of the SWE template that the view uses to Disabled.

Program Logic Tags

This topic describes tags that you can use to control program logic, such as how SWE handles errors or does conditional branching. It includes the following topics:

- *Error Tag*
- *JavaScript Tag*
- *If Tag*
- *Iterate Tag*
- *Iterate Rows Tag*
- *Switch, Case, and Default Tags*

Error Tag

The error tag displays an error message. If an error occurs on the Siebel Server when Siebel CRM:

- Submits a form. SWE displays the same page again and it includes the error message.
- Does not submit a form. SWE continues to use the application error page.

You can use one of the following formats:

- Format one:

```
<div od-type=error>
```

- Format two:

```
<div od-type=error property="FormattedHtml"/>
```

- Format three:

```
<div od-type=error> <div od-property=FormattedHtml"/><!--od section error close->
```

For example:

```
<div od-type=form> <div od-type=error> <b> <font color="red"> <div od-property="FormattedHtml"/> </font> </
b> <!--od section error close-> .....<!--od section form close->
```

Note the following:

- You can use the error tag in any form tag.
- If you do not use an error tag in a Siebel Web template, then the code creates a CSSSWEErrorSWX instance as an error node. It inserts this error node as the first child of the enclosing page or form node.
- If no errors exist when SWE displays a form, then it ignores the contents of the error tag.
- SWE displays the error message in plain text in a new paragraph. If the error message font uses the same color as the background, then it is not visible. You can use the enclosing HTML tags to modify the font and style that Siebel CRM uses for the error message.
- Siebel CRM uses a dialog box to display an error.
- You must use the error tag instead of using the pageitem tag mapped to the _SWEErrMsg item in the application error page. Siebel CRM does not support the _SWEErrMsg item. For more information, see *Web Page Item Tag*.

JavaScript Tag

The scripts tag specifies where to place any JavaScript that SWE creates for the page. It uses the following format:

```
<div od-type=scripts/>
```

This tag does not include any attributes.

Note the following:

- SWE includes some JavaScript code in every page that it sends to the browser. This code must occur after all the Siebel content that the page contains, and it must reside in the HTML body tag.

- The scripts tag must be the last Siebel SWE tag that the template contains, and it must reside in the HTML body tag.
- SWE determines the correct placement of this tag, repositions it, if necessary, and removes any scripts tags that it does not require.
- If you do not specify the scripts tag, then SWE places the JavaScript code immediately after the last tag that the page contains, by default. In some situations, this configuration might occur in an HTML formatting tag that is similar to td … /td. This configuration might cause a minor formatting problem when the browser displays the page.

If Tag

The if tag implements a simple IF THEN conditional branch. It uses the following format:

```
<div od-if condition="business_service,business_service_method,argument1:value1,argument2:value2,..."> ...
 <!--od section if close->
```

where:

- condition. Defines the condition.
- argument:value defines an argument and value pair.

If SWE evaluates the condition to:

- TRUE. It processes the body of the if tag.
- FALSE. It ignores the body of the if tag.

You can use the if tag with any business service, such as a custom business service that examines an HTTP header. The output arguments for this business service must contain a property that includes the name of the business service method and a value of 1 or 0 that indicates if the condition is true or false.

The predefined Web Engine State Properties business service supports the following conditions:

- IsEvenRow
- IsOddRow
- IsCurrentRow
- IsErrorRow
- IsRowMultipleOf
- IsRowPositionOf
- IsLastDisplayedRow
- IsHighInteractive
- IsHighInteractiveApplet
- IsLowInteractive
- Invalid

Iterate Tag

The <div od-prefix> tag iterates a tag according to the number of times that you specify. It can reduce the size of template files if SWE uses the same HTML tags, and if Siebel tags contain controls or page items that include different values for the ID parameter.

This tag uses the following format:

```
<div od-prefix od-id="startValue:count" od-iterator="iterator_Name"/>
```

where:

- count. Specifies the number of times the tag iterates the tag contents.
- iteratorName. Specifies the name of the iterator. You can use the following format to get the value of the iterator during the iteration:

  ```
  od-iterator="iterator_Name"
  ```

  You must replace the iteratorName attribute with the actual name of the iterator. For example, if you set the value of the iteratorName to CurrentID, then you must use the following format:

  ```
  od-iterator=CurrentID
  ```

- startValue.Specifies the value that SWE assigns to the iterator at the start of the iteration. To do the iteration, SWE assigns this start value to the iterator, and then increments the iterator by one for each iteration.

Iterate Rows Tag

The tag iterates each record that SWE displays in a list applet. It creates columns of data that SWE displays in a list applet. It uses the following format:

```
<div od-iterator=row od-id=[0:<count-1>]/>
```

where:

- count.Specifies the maximum number of records to iterate. If the number of records that the list applet contains is less than this count, then the tag only iterates for the number of records that the list applet contains.

You can use this tag only in a Base template for a list applet.

Switch, Case, and Default Tags

The switch, case, and default tags provide conditional branching that is similar to the switch, case, and default statements in the C++ language. For example, they can use the following format:

```
<div od-switch>
 <div od-case condition="case_tag_attribute">
 ...
 </div od-case>
 <div od-case condition="case_tag_attribute">
 ...
```

```
<!--od section case close->
<div od-default>
...
</!--od section default close->
<!--od section switch close->
```

where:

- condition. Is an attribute of the case tag that specifies the condition that SWE examines. The condition attribute uses the same format that the if tag uses. If any case tag:
  - Satisfies the condition. SWE ignores all subsequent case tags and default tags. It processes the body of the if tag.
  - Does not satisfy the condition. SWE processes the body of the default tag.

  For more information, see *If Tag*.

Note the following:

- The switch tag is a container tag that SWE uses for the case and default tags. SWE ignores any other type of tag that the body of the switch tag contains.
- SWE examines the case tags starting with the first case tag it encounters.
- SWE allows only one default tag in the body of a switch tag.

Referential Tags

This topic describes tags that you can use to configure SWE to reference objects. It includes the following topics:

- *Include Tag*
- *Map Siebel Object to OD Tag*
- *This Tag*
- *This Id Tag*
- *This.TableId Tag*

Include Tag

The include tag includes another template in the current template file. It uses the following format:

```
<div od-include="_name"/>
```

where:

- include. Identifies the name of the template that SWE must include.

Map Siebel Object to OD Tag

The idgroup tag maps a Siebel object to OD. It uses the following format:

```
<div od-type=idgroup name="namespace_ID">
```

where:

- name. Identifies the namespace ID. You must identify the namespace to support mapping.

SWE can apply the namespace to other mappings, such as an applet or page item.

Example of Mapping Siebel Objects to OD

For example, assume Siebel CRM must display an applet that includes a DHTML menu in Internet Explorer 5.0, and that it must use regular controls instead of the menu that other browsers use. All other controls that the applet contains are the same for all browsers. To use mappings that are specific to the browser, you can include each mapping in an idgroup tag. For example:

```
<div od-switch>

<div od-case condition="Web Engine User Agent, IsMemberVirtualUA,
'VirtualAgent:IE5'">

<div od-type=idgroup name="IE5">
<div od-type=menu>
...
<!--od section menu close->
<!--od section idgroup close->
<!--od section case close->
<div od-default>
<div od-type=idgroup name="NonIE5">
<div od-type=control id="1" ..>
<div od-type=control id="2" ..>
<!--od section idgroup close->
<!--od section default close->
<!--od section switch close->
<div od-type=control id="3" ..>
<div od-type=control id="4" ..>
```

In this situation, the NonIE5 namespace identifies the 1 and 2 IDs when SWE maps applet controls to the control tags. The Namespace property of the applet web template item stores the namespace value. The Web Layout Editor in Siebel Tools automatically populates this attribute. The mappings to the control tags that include IDs 3 and 4 reside outside of the namespace. This attribute is empty for these mappings. For more information, see *Control Tag*.

This Tag

The this tag references the object that contains it:

- If it is nested in another tag, then it references a property of the parent tag.
- If it resides outside of a tag, then it references the property of an applet, view, or application according to the type of the template where it resides.

This tag uses the following format:

```
<div od-type=control id="1" >
<td> <div od-property="DisplayName"/>:  </td>
<td> <div od-property="FormattedHtml"/> </td>
<!--od section control close->
```

where:

- property. Identifies the name of the property that this tag references. You can use this tag in any OD tag that includes a property attribute.

The following table describes how you can use the this tag. You can use this tag only as a singleton tag except when it references a viewlink tag or a screenlink tag. For more information, see *View Tags*.

Where the This Tag Resides	What it References	Property Attribute Values
Applet Web Template	Applet	The property attribute can contain the following values: • Title. Display the title of the applet. • RowCounter. Display a row counter. You can use the SWE_ROW_COUNTER_MAP list of values to customize the display format of the row counter.
View Web Template	View	The property attribute can contain the following values: • Title. Display the title of the View.
Web Page	Application	The property attribute can contain the following values: • Title. Display the title of the application object.

This Id Tag

The this.Id tag creates scrollable tab bars for a screen or view. It creates a unique ID for the HTML td tag that contains each tab. It uses the following format:

```
<div od-type=screenlink>
 <td id="od-context-Id" ...>
 ...
 </td>
<!--od section screenlink close->
```

You can use this tag only in the HTML td tag that contains a screen, view, or subview tab. You can add it to any one of the following tags:

- *View Link Tag*

This.TableId Tag

The this.TableId tag creates scrollable tab bars for a screen or view. It creates a unique ID for the HTML table tag that contains the tabs. It uses the following format:

```
<div od-type=screenbar>
...
<table ID="od-context-TableId" ...>
<div od-iterator=screenIterator>
...
<!--od section iterator close->
</table>
...
<!--od section screenbar close->
```

You can use the this.TableId tag only in the HTML table tag that contains the screen, view, or subview tabs. You can add it any one of the following tags:

- *Viewbar Tag*

Threadbar Tags

This topic describes tags that you can use to configure the threadbar. It includes the following topics:

- *About Threadbar Behavior*
- *For Each Thread Tag*
- *Thread Separator Tag*
- *Thread Link Tag*
- *About Link Navigation*
- *Example of Using the Threadbar Tags*

The threadbar tracks user navigation among views. The following is an example of the threadbar. The right-angle bracket (>) is a separator:

Home > Consumer:PCs > PCs:Laptops > Laptops:Pentium III

where:

- Home, Consumer:PCs, and so on, are the thread buttons.

About Threadbar Behavior

If the user clicks the thread button, then SWE creates a new bookmark, and then displays a bookmarked view. The bookmark ID for the new view is the current SWE count plus 1. Siebel CRM sends this count to the Siebel Server in the request. The threadbar does the following:

- If Siebel CRM requests a new screen, then SWE creates a new thread that replaces the current thread.
- If a user clicks a view button, then SWE replaces the last thread step with the view that the user requests.
- If the user clicks a link, then SWE appends a new step to the threadbar for the view that the tag references.
- If the user clicks a thread button, then SWE deletes all the thread buttons that exist after the button that the user clicks. It deletes the thread up to the step view according to the value of the SWEBMCount parameter.
- If a thread applet or thread field is not defined for a view, and if Siebel CRM displays this view, then SWE does not update the thread button.

The bookmark ID assignment policy does not modify the bookmark deletion policy. Siebel CRM keeps the 20 bookmarks that it created most recently and deletes previous bookmarks, by default. If the SWE count in the user request is less than the SWE count on the Siebel Server, then Siebel CRM deletes all the bookmarks that contain a SWE count that is larger than the count in the user request.

Usage for the threadbar tags is similar to behavior of the following tags:

- *Viewbar Tag*

For Each Thread Tag

The tag iterates each of the thread steps to display the contents of these steps. It uses the following format:

```
<div od-iterator=threadIterator>
```

Thread Separator Tag

The threadseparator tag specifies the symbol that separates thread buttons. You include it at the beginning or the end of the threadbar tag. It uses the following format:

```
<div od-type=threadseparator> separator_symbol <!--od section threadseparator close->
```

You can use the threadlink and step separator tags only in the threadbar tag.

Thread Link Tag

The threadlink tag identifies the thread button on the threadbar. It uses the following format:

```
<div od-type=threadlink property="value" title="value">...<threadlink>
```

where:

- formattedhtml. Include an HTML link.
- title. Display the title=value pair of the thread button.

About Link Navigation

The thread button can contain a link that navigates the user to a previous page. Separators separate the thread buttons. This link requires the following GotoBookmarkView command:

```
SWECmd=GotoBookmarkView&SWEBMCount=2SWECount =3
```

where:

- SWEBMCount = 2 indicates that SWE uses bookmark #2 to create the view.
- SWECount=3 is the bookmark ID for the current view.

For example, SWE translates a thread button for the AK Parker account into the following HTML:

```
<a href = "www.siebel.com/start.swe?SWECmd=GotoBookmarkView&SWEBMCount=2&SWECount=3> Account: AK Parker </a>
```

Example of Using the Threadbar Tags

To use a threadbar, you insert threadbar tags in an appropriate web template. For example:

```
<div od-type=threadbar>
 ... HTML ...
 <div od-iterator=threadIterator>
 ... HTML ...
 <div od-type=threadlink property="FormattedHtml">
 <span class="threadbar"><nobr><div od-property="Title"/></nobr></span>
 <!--od section threadlink close->
 ... HTML ...
 <div od-type=threadseparator>
 <span class="threadbardiv"> &gt; </span>
 <!--od section iterator close->
 ... HTML ...
 <threadseparator>
 ... HTML ..
 <!--od section threadbar close->
```

This code creates the following threadbar:

```
Home > Consumer:PCs > PCs:Laptops
```

If your Siebel Business Application:

- Uses frames. Put the tags in the web template that contains the view bar frame or the web template that contains the view frame.
- Does not use frames. Put the tags in a container page, such as the PageContainer web template.

Togglebar Tags

This topic describes tags you can use to configure the togglebar.

For Each Toggle Tag

The toggleIterator tag iterates the number of toggle applets. It displays the contents of these toggle applets. It uses the following format:

```
<div od-iterator=toggleIterator>
```

This tag does not include any attributes.

Toggle Bar Tag

This topic describes tags that you can use to configure the toggle bar. It includes the following topics:

- *For Each Toggle Tag*
- *Toggle Link Tag*

- *Toggle Name Tag*
- *Examples of Using the Togglebar Tags*

The togglebar tag displays the toggle selection control in an applet template. It works similarly to how the tag and the

tag work. For more information, see *Viewbar Tag*.

It uses the following format:

```
<div od-type=togglebar type="value" property="value">
```

where:

- type. If you set this attribute to:
  - Select. SWE displays the togglebar as an HTML Select control, which is supported in Siebel OpenUI. This control lists applet titles that the user can click to toggle applets.
- property. If you set this attribute to FormattedHtml, then SWE displays the HTML Select control.

If you do not include this attribute, and if toggle applets are defined, then SWE uses the this tag in the body of this togglebar tag to display the select control. For more information, see *This Tag*.

You can use the property attribute only if you set the type attribute to Select.

If a toggle applet is not defined for the applet, then SWE ignores the togglebar tag.

Toggle Link Tag

The togglelink tag creates a toggle link. It uses the following format:

```
<div od-type=togglelink state="active or inactive" property="value">
```

where:

- state. Optional. You can use one of the following values:
  - Active. Use this tag only if the current applet title identifies the currently active applet.
  - Inactive. Use this tag only if the current applet title does not identify the currently active applet.

  If you do not include the state attribute, then SWE displays this tag in all applets.
- property. Optional. If you set this attribute to FormattedHtml, then SWE creates the HTML that creates a link that the user can use to toggle the applet. If you do not include this attribute, then SWE does nothing.

Toggle Name Tag

The togglename tag displays the applet title. It uses the following format:

```
<div od-type=togglename/>
```

Examples of Using the Togglebar Tags

The following code displays toggle applets as a select control:

```
<div od-type=togglebar type="Select" >
<table>
 <tr>
 <td> <div od-type=control id="1" property="DisplayName"> </td>
 <td> <div od-property="FormattedHtml"/> </td>
 </tr>
</table>
<!--od section togglebar close->
```

where:

- SWE uses the control to create a label that is similar to the following. It places this control before the select control:

```
Show:
```

The following code displays the toggle applets as tabs or links:

```
<div od-type=togglebar>
 <table>
 <tr>
 <td><div od-type=togglelink property="FormattedHtml"> <div od-type=togglename>
<!--od section togglelink close->
 </td>
 </tr>
</table>
<!--od section togglebar close->
```

Toolbar Tags

This topic describes toolbar tags. It includes the following topics:

- *Configuring an HTML or Java Toolbar*
- *Toolbar Tag*
- *Toolbaritem Tag*

A toolbar or toolbar item allows the user to start an action. Siebel CRM displays the toolbar in a separate frame. Siebel CRM maps a command object definition to:

- A toolbar item or toolbar icon that resides in an application-level menu or menu item.
- An applet method menu item that resides in an applet menu.

A toolbar icon or toolbar menu item can reference a method name, a method handler, or a service. This service can reside in one of the following locations:

- On the Browser or the Siebel Server
- In an applet class, business component class, SWE frame manager, or business component data in the Browser or Siebel Server.

Configuring an HTML or Java Toolbar

Siebel CRM supports the following types of toolbars:

- HTML toolbar. Resides in the starting frame or first quadrant in the template. To add an HTML toolbar, you add the following code to the web template:

  ```
  <div od-type=toolbar name=value>
  // any HTML here...
  <div od-type=toolbaritem>
  // any HTML here...
  <!--od section toolbar close->

  where:
  ```

- value is the toolbar name that exists in the repository.

  To configure a box item, you must configure the command so that it references a service.

- Java toolbar. Resides in the frame after the starting frame in Siebel Call Center and other applications that use (CTI) computer telephony integration. If a Siebel Business Application does not use any Java toolbar, then Siebel CRM does not include this lower frame.

  To add a Java toolbar, you add the following code to the web template:

  ```
  <div od-type=toolbar name="name" javaapplet="true"/>
  ```

  The Java applet calls the ShellUIInit method on the service that the command references when the Java applet attempts to start. This applet calls the ShellUIExit method when it exits. Siebel CRM uses a set of communication protocols that it defines for the communication between the Java applet and the service.

  Siebel CRM implements the toolbar as a Java applet that includes all the toolbar controls and the threads that interact with the Siebel Server.

Toolbar Tag

The toolbar tag specifies a toolbar. It uses the following format:

```
<div od-type=toolbar name="name" javaapplet="Boolean" />
```

where:

- name. Name of the toolbar object definition that resides in the repository.
- javaapplet. You can use one of the following values:
  - TRUE. Use a Java toolbar.
  - FALSE or this attribute does not exist. Use an HTML toolbar.

Toolbaritem Tag

The toolbaritem tag resides between the toolbar start and end tags. It gets all of the toolbar items for this toolbar from the repository. It uses the following format:

```
<div od-type=toolbaritem>
```

This tag does not include any attributes.

Tree Tags

This topic describes tags that you can use to configure an explorer view that contains a tree applet and a list applet that allows the user to view tree details. This view style displays hierarchically structured information in an expandable tree control. It includes the following topics:

- *Applet Tree List Tag*
- *For Each Indent Tag*
- *For Each Node Tag*
- *Indent Image Tag*
- *Node Tag*

SWE does the following:

- Displays the tree control in a vertical frame before the applet.
- Displays detailed information for the item that the user chooses in the tree. It displays these details in a detail applet in a vertical frame after the applet.

These vertical frames allow the user to scroll the tree applet independently of the detail applet. This configuration allows the tree to grow in length and width.

SWE does the following to display a tree:

- Iterates each item of the tree.
- Displays each item start-last, depth-first.
- Displays one item at time.
- Indents each tree item so that the text displays at the correct indent level relative to the master, and to display the expand and collapse button, the text of the item, and the links.
- It uses one of the following to display the indentation, the expand button, the collapse button, and the item:
    - A series of GIF images.
    - Text if in text-only mode.
- Displays the list applet that is associated with the currently chosen tree node as part of the view.

Applet Tree List Tag

The applet-tree-list tag is a placeholder for the list applet that SWE displays if the user chooses or expands a tree item. This list applet depends on the type of the item that is currently chosen.

This tag uses the following format:

```
div od-type=applet-tree-list
```

This tag does not include any attributes.

For Each Indent Tag

The tag creates an indentation. It iterates each level of a tree item. It does not include any attributes.

This tag uses the following format:

```
div od-iterator=indentIterator>
```

For Each Node Tag

The tag display tree nodes and field values. It iterates each visible item in the tree control start-last and depth-first. If you do not specify the count attribute, then this tag iterates all nodes in the tree. This tag uses the following format:

```
<div od-iterator=nodeIterator>
```

Indent Image Tag

The indent-img tag provides a placeholder for the GIF image that corresponds to the current indentation level of a tree item. SWE identifies the GIF file it uses in the img tag at each level. The GIF image in this file can be an empty space or a vertical bar.

This tag uses the following format:

```
<div od-type=indent-img>
```

This tag does not include any attributes.

Node Tag

The node tag provides a placeholder for a tree item. This item can be one of the following:

- Tree node. SWE displays the display name.
- Field value. SWE creates the field value.

This tag uses the following format:

```
<div od-type=node state="value" type="value"/>
```

where:

- state. You can use one of the following values:
  - Active. A chosen node.
  - Inactive. A nonchosen node.
- type. You can use one of the following values:
  - DisplayName. Display the Display Name property of the tree node.
  - FieldValue. Display the field value.

The expand and collapse button, the item icon, and the links are part of a tree item. Depending on settings in the configuration file, SWE displays the expand and collapse button as a GIF image or as text. It displays the expand and collapse button only if the tree item includes a child item.

The following links are associated with each item:

- A link for the expand and collapse button that expands or collapses the item.
- A link for the item image that allows the user to choose the item or to navigate to the next or previous workset.

This tag uses the this tag as a child tag. For more information, see *This Tag*.

View Tags

This topic describes tags that you can use to configure how SWE displays a view. It includes the following topics:

- *Overview of Using View Tags*
- *Current View Tag*
- *For Each View Tag*
- *View Tag*
- *Viewbar Tag*
- *View Link Tag*
- *View Name Tag*
- *Predefined Query Tag*

Overview of Using View Tags

SWE can display the following views on a single page:

- Main view. The user uses the level 2 or level 3 view bar to choose the main view. A page can include only one main view.
- Alternate views. Any other view. For example, the Search view that displays applets.

SWE can display views in the following ways:

- Each view in a separate HTML frame.
- All views in a single frame.
- Multiple views in the main browser window or in a dialog box.

The examples in this book describe multiple view layouts that use SWE frames. The description for usage without frames is similar except you can use HTML tables to position the views instead of frames and framesets.

To support multiple views, you must modify frames, framesets, and the Content Container. The Content Container is the container page for the content area.

Modifications that Occurred Starting with Siebel CRM Version 8.x

Siebel CRM version 8.x includes an outer content frame. If you configured a view frame in the application container page, then you must replace this view frame with a content frame. In prior versions, the application container page template that includes the view frame without the outer content frame does not create any errors, but it does allow you to configure Siebel CRM to display multiple views.

if you configured a view frame in the application container page in a version prior to Siebel CRM version 8.x, then you must replace this view frame with a content frame. This content frame defines the area where Siebel CRM can load one or more views. This frame contains a frameset that includes a view frame. The structure of this container template must be similar to the following example:

```
<div od-type=frameset htmlAttr="rows='80,50,50,*' border='0'frameborder='No'">

 <div od-type=frame type="Page" htmlAttr="marginheight='0' marginwidth='0' noresize scrolling='No'">
 <div od-include="CCFrameBanner"/>
 <!--od section frame close->

 <div od-type=frame type="Screenbar" htmlAttr="marginheight='0' marginwidth='0' noresize scrolling='No'">
 <div od-include="CCFrameScreenbar"/>
 <!--od section frame close->

 <div od-type=frame: type="Viewbar" htmlAttr="marginheight='0' marginwidth='0' noresize scrolling='No'">
 <div od-include="CCFrameViewbar"/>
 <!--od section frame close->

<!--od section frameset close->
```

Displaying More Views in the Content Area

To display more views in the content area, you can configure Siebel CRM to load a different content container page in the content frame. To do this, you can configure SWE to call the LoadContentContainer method from a control or page item. The User Property Container sends this content container.You set this to the Web Template Name of the content container page.

For example, to display the search view with the main view, you can configure SWE to create a content container page, such as CCSMainAndSearchView, and then use the LoadContentContainer method to load it. The following code from the CCSMainAndSearchView web template contains the tags that load the main view and search view into two frames:

```
<div od-type=frameset htmlAttr="cols='100%' border='0' frameborder='No'">
 <div od-type=frame: type="View" htmlAttr="noresize scrolling='Yes'">
 <div od-type=current-view/>
 <!--od section frame close->
 <div od-type=frame type="AltView" name="Search" htmlAttr="noresize scrolling='Yes'">
 <div od-type=view name="Search View" id="Search" />
 <!--od section frame close->
 <!--od section frameset close->
```

The current-view tag references the main view. The view tag references alternate views.

Current View Tag

The current-view tag identifies the location or zone that an alternate view occupies. It uses the following format:

```
<div od-type=current-view>
```

This tag allows the user to navigate to other views when multiple view zones exist. In the example in the *Displaying More Views in the Content Area* topic, SWE navigates to the Search view the first time it displays the search view zone. During any subsequent display of this zone, the specialized frame code in the Search view can call the BuildViewAsync method or it can display controls that the GotoView method references that allow the user to navigate to other views. For important caution information, see *Using Specialized Classes*.

The main view contains an empty view ID.

If you configure SWE to make a call from:

- The BuildViewAsync method. You must set the pViewId parameter to the View ID of the view that SWE must display.
- A frame. You must use the view ID of the frame that the m_cszViewId data member of the frame sets. This data member is part of the CSSSWEFrame class. It identifies the view where the frame resides. This configuration causes Siebel CRM to display another view in the same view zone.

To configure the main view to navigate to another view, you can configure SWE to call the BuildViewAsync method and set the pViewId parameter to NULL.

You can use the following code to get a view:

```
CSSSWEFrameMgr::GetView (const SSchar* pViewId = NULL);
```

where:

- GetView is a method that resides in the CSSSWEFrameMgr class.

You can use the following code to get the main view:

```
m_pFrameMgr->GetView()
```

You can use the following code to get the search view:

```
m_pFrameMgr->GetView ("Search")
```

For Each View Tag

The tag iterates the views that SWE displays in the view bar. It uses the following format:

```
<div od-iterator=viewIterator>
```

This tag does not include any attributes.

View Tag

The view tag identifies alternate views in a frame set. It uses the following format:

```
<div od-type=view name="name" id="ID">
```

where:

- name. Name of the alternate view.
- id. An ID that identifies the location or zone that this view occupies. This ID replaces this view with another view.

Viewbar Tag

The viewbar tag implements a drop-down list or a detail view list. It uses the following format:

```
<div od-type=viewbar type="value" mode="context" property="value">
```

where:

- type. You can use one of the following values:
  - Select. If the user chooses this control, then display the view that this control references.
  - A value other than Select. Display the view bar as an HTML select control that includes the set of context or noncontext views, depending on the value of the mode attribute.
- mode. You can use one of the following values:
  - Context. Display only context views.
  - NonContext. Display only noncontext views.

  If you do not specify the mode attribute, then SWE displays all views.
- property. You can use this attribute only if you set the type attribute to Select. If:
  - You set this attribute to FormattedHtml, then SWE displays the HTML select control.
  - You do not specify this attribute, and if no views exist that SWE can display, then SWE displays the contents of this viewbar tag.

How the Viewbar Tag Implements Drop-Down Lists and Tabs

The viewbar tag implements the drop-down list that Siebel CRM uses for second-level navigation and the detail view list that Siebel CRM uses for third-level navigation. You can use it to implement one of the following items:

- Drop-down list. SWE populates each item in the drop-down list with the display name of a context view. It displays the visibility drop-down list in the view bar frame. To implement this drop-down list as a viewbar tag, the following code in the PageContainer web template or the CCFrameViewbar web template sets the Type attribute to Select and the Mode attribute to Context:

```
 <div od-type=form> <td nowrap> <div od-type=viewbar type="Select" mode="Context"> <div od-
property="FormattedHtml"/> <!--od section viewbar close-> </td> <!--od section form close->
```

- Tabs. SWE creates a horizontal view bar that includes tabs. It sets each tab label to the display name of a noncontext view. To implement this view bar, the following code in the CCViewbar_Tabs web template does not include the Type attribute and it sets the Mode attribute to NonContext:

- ```
   ... HTML ...  ... HTML ... <div od-type=viewlink
   state="Active"> ... HTML ....  ... HTML .... <div od-type=viewname/
  > ... HTML ... <!--od section this close->
   ... HTML ... <!--od section viewlink close->  ... HTML .... <div
   od-property="FormattedHtml"> ... HTML ....  ... HTML ... <!--od section this
   close-> ... HTML ... <!--od section viewlink close->
   ... HTML .. <!--od section iterator close-> ... HTML ..<!--od section viewbar close->
  ```

The detail view bar requires the following tags. The drop-down list does not require these tags:

- child viewIterator
- viewlink
- viewname

View Link Tag

The viewlink tag displays a link that the user can click to display a view. It uses the following format:

```

```

where:

- state. Optional. You can use one of the following values:
  - Active. Use this tag only if the current view name identifies the currently active view.
  - Inactive. Use this tag only if the current view name does not identify the currently active view.

  If you do not include the state attribute, then SWE displays this tag in all views.
- property. Optional. You can only use FormattedHtml as the value for this attribute. It creates the HTML that defines the link. If you do not include this attribute, then SWE creates no output.
- htmlAttr. Optional. Add more HTML attributes to the HTML tag.

To display HTML for an active view that is different than the HTML for an inactive view, you can use the viewlink tag without specifying the property attribute but with a value for the state attribute. If you do not include the property attribute, then you can use the this tag to display the property in the body of the viewlink tag. For more information, see *This Tag*.

View Name Tag

The viewname tag displays the view name. It uses the following format:

```

```

Predefined Query Tag

The pdqbar tag displays the list of predefined queries for a view, runs a predefined query, and sends the query result. It uses the following format:
```

```
<div od-type=pdqbar>...HTML code...
<div od-type=pageitem id="##"/>
...HTML code...
<div od-property="FormattedHtml" />
<!--od section pdqbar close->
```

To display a label, you can use a pageitem tag in the view bar or a control tag in the view. You include these tags in the pdqbar tag. For more information, see *Web Page Item Tag* and *Control Tag*.

Tags That Support a Specific Feature

This topic describes tags that you can use to configure how SWE displays a particular feature. It includes the following topics:

- *Language Conversion Tag*
- *Training Tag*
- *Wireless Tag*
- *XSL Stylesheet Tag*

Language Conversion Tag

The dir tag creates a template that can work with a bidirectional language. If SWE displays:

- A language that the reader reads from right to left (rtl), then it converts the dir tag to dir="rtl".
- A language that the reader reads from left to right, it does nothing.

This tag uses the following format:

```
<HTML dir="div od-tpe=dir">
```

You can use this tag only in an HTML tag that includes the dir attribute.

Training Tag

A training tag is an OD tag that SWE uses only with Siebel Training Test. The following table describes these tags.

OD Tag	Description
	Display an answer.
	Display the list of answers for the test.
	Display all the questions that the test contains.
	Display the maximum number of points for the test question.

OD Tag	Description
	Display the points that the user earned.
	Display the test question sequence.
	Display the text of the test questions.
	Display the name of the test.
	Display the answers that the user provided.

Wireless Tag

The screenoptionlink tag creates links that use a phone style so that the client displays phone numbers for list items. You can use it only with an application that uses Wireless Markup Language. It uses the following format:

```
<div od-type=screenoptionlink>
```

XSL Stylesheet Tag

The xsl-stylesheet tag specifies the name of the XSLT stylesheet (EXtensible Stylesheet Language) on the XML output document. It uses the following format:

```
<swe:xsl-stylesheet name= "table.xsl" mode= "process"/>
```

where:

- name. Specifies the name of the stylesheet.
- mode. You can use one of the following values:
  - Process. SWE processes XSLT on the XML output, and then sends the transformed document back to the client.
  - Embed. SWE inserts an XML processing instruction in the beginning of the XML document that Siebel CRM uses for external XSLT processing.

  For more information, see the topic about manipulating Siebel XML with XSL stylesheets and XSLT in *XML Reference: Siebel Enterprise Application Integration* .

The style sheet must reside in the following directory:

```
\webtempl
```

Each view template contains only one xsl-stylesheet tag. If the view contains more than one xsl-stylesheet tag, then SWE uses the last tag that this view contains.

Tags That Are for Oracle Internal Use Only

This topic describes tags that only Oracle personnel can modify. It includes the following topics:

- *All Applets, All Controls, and List Control Tags*
- *Calendar Tags*
- *Gantt Chart Tags*

You must not modify these tags without assistance from Oracle. For more information, see *Getting Help From Oracle*.

All Applets, All Controls, and List Control Tags

SWE uses the following tags with the XML to SWE interface if SWE is in No Template mode. They are only for Oracle internal use:

-
-
-

Calendar Tags

The OD calendar tags are specialized OD tags that SWE uses only with a calendar applet. They are only for Oracle internal use. They include the following tags:

- <div od-type=calendar “>
-
- <div od-type=calendarActivityLoop “>
-
-
-
-
-
-
-

Gantt Chart Tags

The Gantt chart tags are specialized OD tags that SWE uses only with a Gantt chart. They are only for Oracle internal use. The following tags are Gantt tags:

-

-
-
-
-
-
-
-
-
-
-

8 Siebel Templates for Employee Applications

Siebel Templates for Employee Applications

This chapter describes the predefined templates that Siebel CRM uses in an employee application. It includes the following topics:

- *Overview of Configuring Siebel Templates for Employee Applications*
- *Form Templates*
- *List Templates*
- *Calendar Templates*
- *Chart Templates*
- *Container Templates*
- *Popup Templates*
- *Search Templates*
- *Tree Templates*
- *View Templates*
- *Specialized Employee Templates*
- *Wizard, Error, and SmartScript Templates*

Overview of Configuring Siebel Templates for Employee Applications

This topic describes an overview of configuring Siebel templates for employee applications. It includes the following topics:

- *Guidelines for Configuring Applet Templates*
- *About Mapping IDs to Placeholders*
- *Elements in the Client of an Employee Application*

Guidelines for Configuring Applet Templates

If you configure an applet template, then use the following guidelines:

- Never map a native HTML button to a list or form. You can set the properties for a MiniButton the same way you set the properties for most controls.
- To save time during configuration, you can place the button divider after the menu button and before the previous record button.

- To maximize the potential for vertical alignment, place taller fields, such as text area fields, at the ending part of the form. Siebel CRM displays each column of fields independently of the other columns. This configuration maximizes form layout options and minimizes gaps that might occur between fields in the same column but where the alignment of fields across columns might not remain vertical.
- To define the text that Siebel CRM displays in the client, you can map the control on a label and use the Caption property of the control. A form section is not a control. It is a label that groups related fields. The FormSection control implements a form section. Siebel CRM expands the FormSection label to fit the region where you place it. To set it apart from the background color, the label displays against the FormSection color that the cascading style sheet defines. For more information about this control, see *Configuring Siebel Business Applications* .
- If you configured Siebel CRM in an earlier version to use the Previous or Next text labels, then you must reconfigure this customization to use the RecNavPrv and RecNavNxt controls. All record navigation must map to these controls. For more information about these controls, see *Configuring Siebel Business Applications* .

About Mapping IDs to Placeholders

Siebel CRM can map an ID to a placeholder. For example, the first row in *Form Template for Edit, New, or Query Mode* describes that you can map ID 2 to the Back placeholder. The Placeholder column in this table lists the placeholder that you can map to an ID. It displays the exact label that Siebel Tools displays in the Web Layout Editor. If you can map an ID to more than one placeholder, then this column lists each item. For example, *Form Template for Edit, New, or Query Mode* describes that you can map any ID in the range of 1296 through 1300 to a Required, Label, or 2-Column Wide Field placeholder.

Note that Siebel CRM uses ID 599 to map a Save control.

Elements in the Client of an Employee Application

The following table describes an overview of user interface elements that Siebel CRM uses in the Siebel Web Client for an employee application.

User Interface Element	Description
Application menu	An application-level menu that includes menu items, such as File, Edit, View, Navigate, Tools, and Help.
Branding area	The area where Siebel CRM displays the Oracle logo.
Application toolbar	A toolbar that includes icons for items, such as Site Map, Customer Dashboard, and iHelp items.
Applet control banner	An area that contains a menu and buttons for a form or list.
Primary applet	The first form or list on the page that displays the primary record or record set.
Detail applet	An applet that displays different sets of data according to the individual primary record. If Siebel CRM modifies the primary record, then it also updates data.
First-level navigation	Set of tabs that allow the user to navigate to screens.

User Interface Element	Description
Second-level navigation	Links that allow the user to navigate to views. Siebel CRM can display these links directly under the screen tabs or in the visibility filter.
Third-level navigation	View tabs in the view bar that Siebel CRM displays after the first applet in a view.
Fourth-level navigation	Links that Siebel CRM displays under the third-level tabs, view tabs on a grandchild applet, or links in a drop-down list.
Record navigation	An area that displays the record set and allows the user to navigate forward and backward in the record set.
Search	A button that integrates search and global find.
Favorites	A list of saved and predefined queries for the view.
iHelp frame	An area that displays links that the user can click to navigate through steps in a task.

The mode that an applet Web template uses determines the kind of work the user can do in this applet. It also determines the buttons that Siebel CRM displays in a web template. For example, it displays the Edit button in an applet that is in Edit mode but it does not display this button in an applet that is in Base mode.

Form Templates

This topic describes applet form templates. It includes the following topics:

- *Overview of Using Applet Form Templates*
- *Form Template for Edit, New, or Query Mode*
- *One Column Form Template*
- *One Column Form, Light Template*
- *One Column Form, Light Template for Base, Edit, or New Mode*
- *Four Column Form Template for Base Mode*
- *Four Column Form Template for Edit or New Mode*
- *Four Column Form Template With No Record Navigation*
- *Grid Layout Form Template*

Overview of Using Applet Form Templates

This topic describes an overview of using applet form templates.

About Form Layouts That Use a Grid

A grid layout template does not use placeholder tags. It uses the following Siebel tags in a single location for all controls that reside in the main body of the form:

```
<div od-type=form-applet-layout></!--od section form-applet-layout close->
```

A grid layout template includes the following items:

- Body. The following tag defines the body. It contains no placeholder tags:

  ```
  <div od-type=form-applet-layout>
  ```

- Header or footer. You must not use placeholder tags for items such as buttons in a header or footer. You cannot use the Web Layout Editor to modify the layout of a header or footer.

An applet Web template that uses a grid is different from an applet Web template that does not use a grid in the following ways:

- To modify a form layout, you can use a grid template in the Web Layout Editor in Siebel Tools without modifying the web template that the form references.
- Labels and controls in a grid template are separate items in the Web Layout Editor. You can place them independently in the applet layout. However, a label and the control that it references are actually a single object in the repository with one set of shared properties.
- A grid template does not compress empty space in a column. The browser compresses horizontal space as much as possible without modifying the size of any field on the form applet.

For examples of grid layout templates, see *Grid Layout Form Template* and *Popup Form, Grid Layout Template*.

About Form Layouts That Do Not Use a Grid

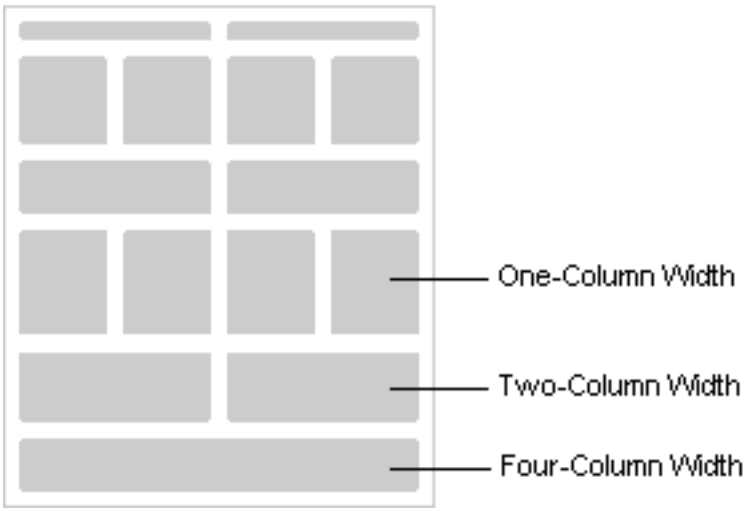
This topic describes form layouts that do not use a grid that are available but that no longer come predefined with Siebel CRM. Starting with Siebel CRM version 7.7, most form applets use a grid layout.

The four column form templates define a set of layout regions. A region can include one or more label and field pairs. You can use Siebel Tools to place a control in a region and to resize the control. The four column form includes regions that are different in height. It can accommodate controls that span one, two, or four columns.

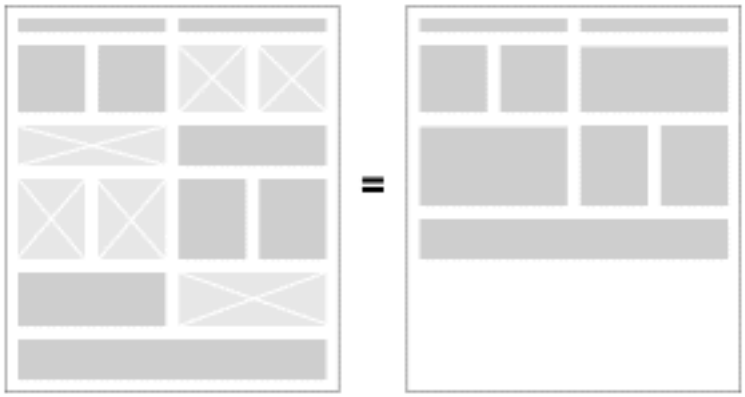
Siebel CRM groups these regions. This grouping helps make sure that each region uses only the minimum vertical space that Siebel CRM requires to display it. If Siebel CRM does not map any control to a region, then it collapses this region and moves the next region up in the form.

To create a wide variety of form designs while maintaining only one form template, you can combine horizontally proportioned regions with grouped regions.

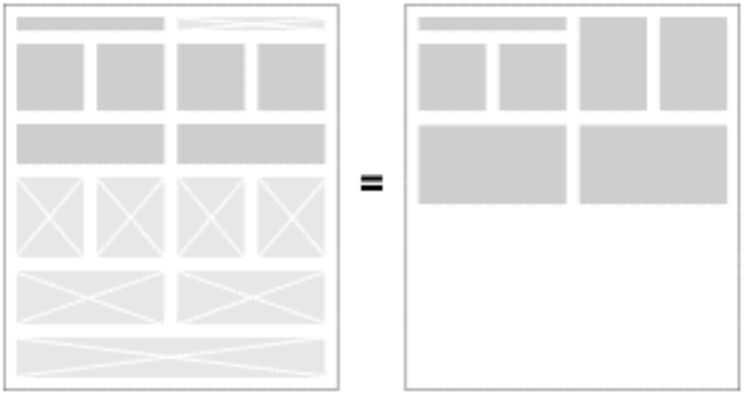
The following figure displays the master template for layout regions.



The following figure includes an example of a layout that Siebel CRM creates from the master template. Each X indicates a region that does not contain any mapped control.



The following figure includes another example of a layout that Siebel CRM creates from the master template.



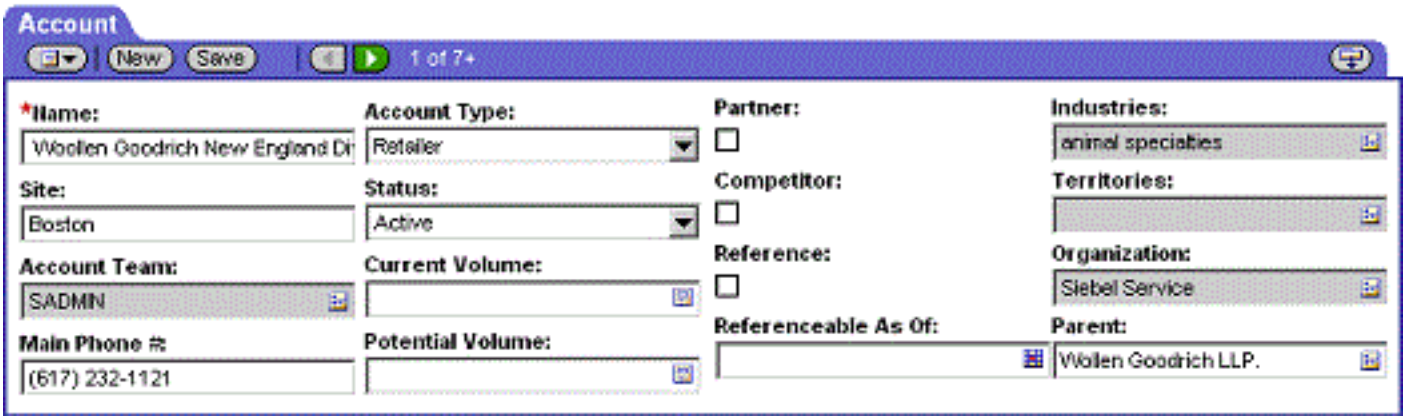
The following figure displays the ID ranges that Siebel CRM uses for the controls that it displays in each region. It is recommended that you configure Siebel CRM to map each control to the lowest ID that is available in each region.

About the Style That Some Four Column Form Templates Use

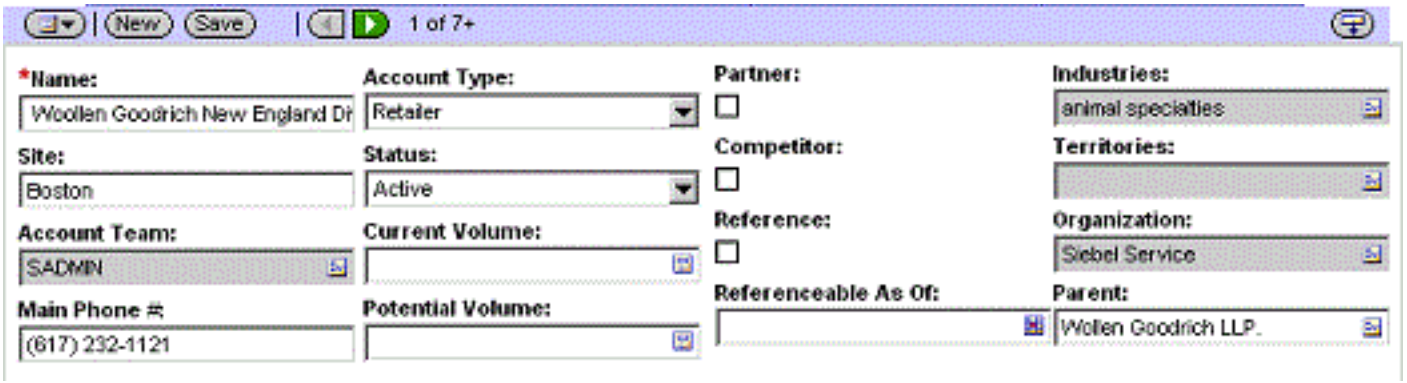
The following templates create the same layout for a form that includes four columns. They also support child and grandchild styles.

- *Four Column Form Template for Base Mode*
- *Four Column Form Template for Edit or New Mode*
- *Form Template for Edit, New, or Query Mode*

The following figure includes a parent style that these templates display.



The following figure includes a child style that these templates display.



Capabilities of Four Column Form Templates

Form templates that include four columns can do the following:

- Define a large number of control placeholders. Some of these placeholders can span one column, two columns, or four columns.
- Map fields up to four columns.
- Display labels at start of field values.
- Display validation errors at the start of the form.
- Support text in ID 91 that spans all four columns.
- Support the predefined applet styles.

Form Template for Edit, New, or Query Mode

The following figure includes the generic layout that the Applet List Edit (Edit/New/Query) Web template uses. For more information, see *About the Style That Some Four Column Form Templates Use*.



This template uses the following structure:

```
Applet List Edit (Edit/New/Query)
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCFormButtonsTop
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCFormButtonsTopRight
 CCList4ColBody
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
125	Info-Button

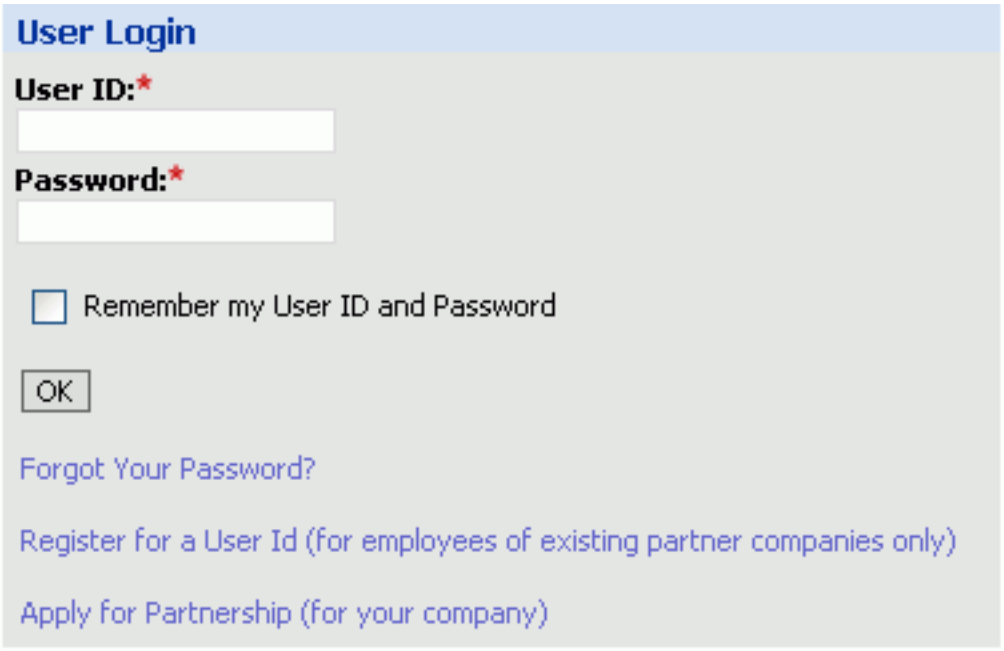
ID	Placeholder
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
160 through 164	Control
192	Label
194	Label
580	New
599	Save
1001 through 1009	FormSection
1020	FormSection
1296 through 1300	Required or Label or 2-Column Wide Field
1301 through 1310	Required or Label
1311 through 1315	Required or Label or 2-Column Wide Field
1316 through 1330	Required or Label or Field
1331 through 1335	Required or Label or 4-Column Wide Field
1336 through 1340	Required or Label or 4-Column Wide Field

ID	Placeholder
1360 through 1374	Required or Label or Field
1500	Required or Legend
1801 through 1810	Required or Label or Field
1816 through 1830	Required or Label or Field
1860 through 1874	Required or Label or Field
2001 through 2009	FormSection
2296 through 2300	Required or Label or 2-Column Wide Field
2301 through 2310	Required or Label or Field
2311 through 2315	Required or Label or 2-Column Wide Field
2316 through 2330	Required or Label or Field
2331 through 2335	Required or Label or 2-Column Wide Field
2360 through 2374	Required or Label or Field
2801 through 2810	Required or Label or Field
2816 through 2830	Required or Label or Field
2860 through 2874	Required or Label or Field

One Column Form Template

The Applet Form 1-Col (Base/Edit/New) template uses the Applet Form 1 Column (Base/Edit/New) Web template. It also supports the child and grandchild styles.

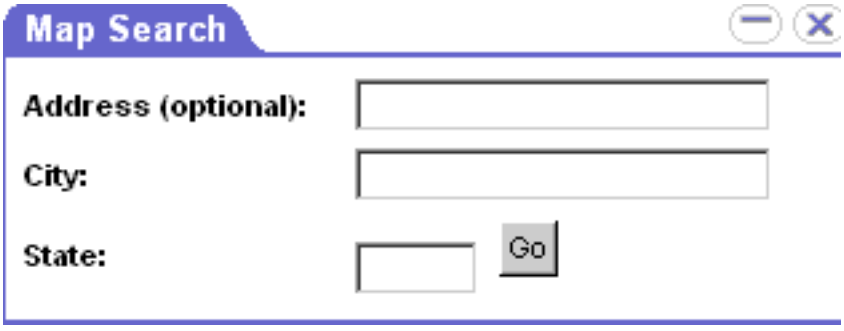
The following image includes an example of this template.



One Column Form, Light Template

The Applet Form 1-Col Light (Base/Edit/New) template uses the Applet Form 1 Column Light (Base/Edit/New) Web template. You can use it on a portal page where you require a light, single-column form.

The following image includes an example of this template.



One Column Form, Light Template for Base, Edit, or New Mode

The Applet Form 1 Column Light (Base/Edit/New) template uses the Applet Form 1 Column Light (Base/Edit/New) Web template. This template does the following:

- Supports a required field indicator for each field.
- Supports narrow columns, such as the columns that a home page view displays.
- Supports parent, child, and grandchild styles.
- Displays a label at start of the field value.

- Displays buttons at the end of the applet.
- Gets the applet title from the Title property of the applet.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletForm1ColumnLight (Base/Edit/New)
 CCApplet_NamedSpacer
 CCTitle_NamedC
 CTitle
 CCForm1ColBodyLight
 dCCFormButtonsBottom
 dCCButtons_Form
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 110	Control
131	New
132	Edit
133	Delete
134	Reset
135	Cancel

ID	Placeholder
136	Save
139 through 143	Control
151 through 155	Control
156	Control
157 through 158	Control
1301 through 1330	Required or Label or Field
1500	Required or Legend

Four Column Form Template for Base Mode

The predefined Applet Form 4 Column (Base) template uses the AppletForm4Column (Base) web template.

The following image includes the generic layout that this template uses. For more information, see *About the Style That Some Four Column Form Templates Use*.



This template uses the following structure:

```
AppletForm4Col (Base
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCFormButtonsTop
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCFormButtonsTopRight
 CCForm4ColBody
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
125	Info Button
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
160 through 164	Control
192	Label

ID	Placeholder
194	Label
580	New
599	Save
1001 through 1009	FormSection
1020	FormSection
1296 through 1300	Required or Label or 2-Column Wide Field
1301 through 1310	Required or Label or Field
1311 through 1315	Required or Label or 2-Column Wide Field
1316 through 1330	Required or Label or Field
1331 through 1335	Required or Label or 2-Column Wide Field
1336 through 1340	Required or Label or 4-Column Wide Field
1360 through 1374	Required or Label or Field
1500	Required or Legend
1801 through 1810	Required or Label or Field
1816 through 1830	Required or Label or Field
1860 through 1874	Required or Label or Field
2001 through 2009	FormSection
2296 through 2300	Required or Label or 2-Column Wide Field
2301 through 2310	Required or Label or Field
2316 through 2330	Required or Label or Field
2331 through 2335	Required or Label or 2-Column Wide Field

ID	Placeholder
2360 through 2374	Required or Label or Field
2801 through 2810	Required or Label or Field
2811 through 2815	Required or Label or 2-Column Wide Field
2816 through 2830	Required or Label or Field
2860 through 2874	Required or Label or Field

Four Column Form Template for Edit or New Mode

The predefined Applet Form 4 Column (Edit/New) template uses the AppletForm4Col (Edit/New) Web template.

The following image includes the generic layout that this template uses. For more information, see *About the Style That Some Four Column Form Templates Use*.



This template uses the following structure:

```
CCAppletForm4Col (Edit/New)
 CCApplet_NamedSpacer
 CCTitle_Name
 CCTitle
 CCFormButtonsTop
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCFormButtonsTopRight
CCForm4ColBody
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
91	Inside Applet Help Text

ID	Placeholder
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
125	Info Button
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
160 through 164	Control
192	Label
194	Label
580	New

ID	Placeholder
599	Save
1001 through 1009	FormSection
1020	FormSection
1296 through 1300	Required or Label or 2-Column Wide Field
1301 through 1310	Required or Label or Field
1311 through 1315	Required or Label or 2-Column Wide Field
1316 through 1330	Required or Label or Field
1331 through 1335	Required or Label or 2-Column Wide Field
1336 through 1340	Required or Label or 4-Column Wide Field
1360 through 1374	Required or Label or Field
1500	Required or Legend
1801 through 1810	Required or Label or Field
1816 through 1830	Required or Label or Field
1860 through 1874	Required or Label or Field
2001 through 2009	FormSection
2296 through 2300	Required or Label or 2-Column Wide Field
2301 through 2310	Required or Label or Field
2316 through 2330	Required or Label or Field
2331 through 2335	Required or Label or 2-Column Wide Field
2360 through 2374	Required or Label or Field
2801 through 2810	Required or Label or Field

ID	Placeholder
2811 through 2815	Required or Label or 2-Column Wide Field
2816 through 2830	Required or Label or Field
2860 through 2874	Required or Label or Field

Four Column Form Template With No Record Navigation

The predefined Applet Form 4-Col (No Record Nav) template uses the AppletForm4-Col (No Record Nav) Web template. For more information, see *About the Style That Some Four Column Form Templates Use*. This template does not support record navigation.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
CCAppletForm4Col (NoRecNav)
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCFormButtonsTopNoRecNav
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCFormButtonsTopRight
 CCForm4ColBody
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)

ID	Placeholder
108	Cancel (Query)
109 through 111	Control
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
160 through 164	Control
580	New
599	Save
1001 through 1009	FormSection
1020	FormSection
1296 through 1300	Required or Label or 2-Column Wide Field
1301 through 1310	Required or Label or Field
1311 through 1315	Required or Label or 2-Column Wide Field
1316 through 1330	Required or Label or Field
1331 through 1335	Required or Label or 2-Column Wide Field
1336 through 1340	Required or Label or 4-Column Wide Field

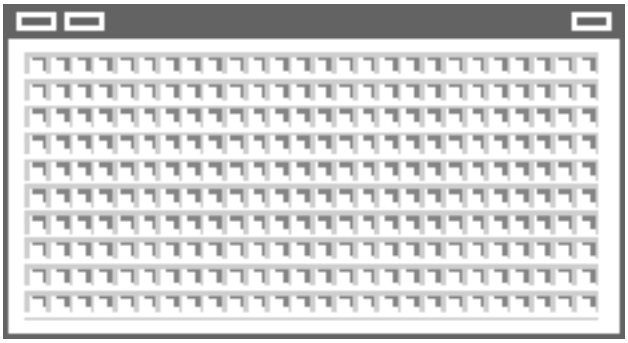
ID	Placeholder
1360 through 1374	Required or Label or Field
1500	Required or Legend
1801 through 1810	Required or Label or Field
1816 through 1830	Required or Label or Field
1860 through 1874	Required or Label or Field
2001 through 2009	FormSection
2296 through 2300	Required or Label or 2-Column Wide Field
2301 through 2310	Required or Label or Field
2316 through 2330	Required or Label or Field
2331 through 2335	Required or Label or 2-Column Wide Field
2360 through 2374	Required or Label or Field
2801 through 2810	Required or Label or Field
2811 through 2815	Required or Label or 2-Column Wide Field
2816 through 2830	Required or Label or Field
2860 through 2874	Required or Label or Field

Grid Layout Form Template

The Applet Form Grid Layout template uses the Applet Form Grid Layout Web template. It uses the following tag as a placeholder for all controls on a form applet. This tag allows you to use the Web Layout Editor in Siebel Tools to modify the layout of the controls:

```
<div od-type=form-applet-layout>
```

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
CCAppletFormGridLayout
 CCApplet_NamedSpacer
 CCTitle_Named
 CCFormButtonsTop
 CCButtons
```

The following table lists the controls that Siebel CRM can map to the header region of the Applet Form Grid Layout template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
125	Info-Button
131	New
132	Edit

ID	Placeholder
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
160 through 164	Control
192	Label
194	Label
580	New
599	Save
1500	Required or Legend

List Templates

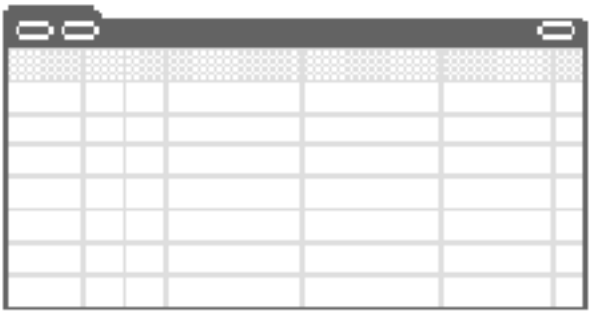
This topic describes applet list templates. It includes the following topics:

- *List Template for Base or Edit List Mode*
- *Inverted Axis List Template*
- *Message List Template*
- *Portal List Template*
- *Portal List Template with Graphics*
- *Totals List Template for Base or Edit List Mode*

List Template for Base or Edit List Mode

The Applet List (Base/EditList) template uses the AppletList (Base/EditList) Web template. You can use it for a read-only or editable list. It supports the parent, child, and grandchild styles.

The following image includes the generic layout that this template uses.



The following image includes an example that uses a single row layout that the user can edit.



This template uses the following structure:

```
AppletList (Base/EditList)
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCListButtonsTop
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCListButtonsTopRight
 CCListHeader
 CCListBody
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First

ID	Placeholder
122	Previous
123	Next
124	Last
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
142 through 143	Control
144	Selected Row
145	Control
146	Save
147	Pick Control
150 through 151	Control
160 through 164	Control
501 through 540	Field
580	New
598	Save
599	Save

ID	Placeholder
611 through 650	Field
1100	Outside Applet Help Text
1500	Required or Legend

Configuring How Siebel CRM Uses the Columns Displayed Feature

A list can typically display between seven and ten visible columns. To make sure all columns are visible, and to avoid unwanted text-wrapping or horizontal scrolling, it is recommended that you do not configure Siebel CRM to map more than ten columns. This template can map up to 80 fields. You typically set the majority of these fields to available but hidden. Siebel CRM does not display hidden fields in the list, by default. It displays them in the Columns Displayed dialog box.

Siebel CRM can set the Columns Displayed menu item of the Menu drop-down list as a shading to indicate that it is not available. If the applet mode is not Edit List, then this menu item is not visible. For more information, see *List Template for Base or Edit List Mode*.

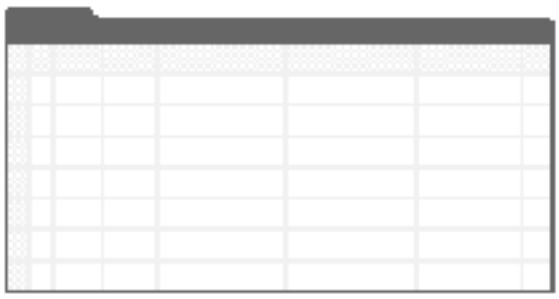
To display the Columns Displayed menu item, the following objects must be in Edit List mode:

- The applet.
- The view web template items of the parent view.

Inverted Axis List Template

The Applet List Inverted template uses the AppletListInverted Web template. This is a specialized list applet that creates a comparison list. To display column headers down the first side of the list, Siebel CRM inverts the x-axis and y-axis of this list. It is recommended that you configure this list to display three to five records. The user can use this list to page through larger record sets.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
CCAppletListInverted
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
```

```
CCListButtonsTop
CCButtons
CCRecordNav
CCTogglebar_drop
CCListButtonsTopRight
CCListBodyInverted
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
160 through 164	Control

ID	Placeholder
499	Record Title Row
501 through 520	Control
580	New
599	Save
1100	Outside Applet Help Text
1500	Required or Legend

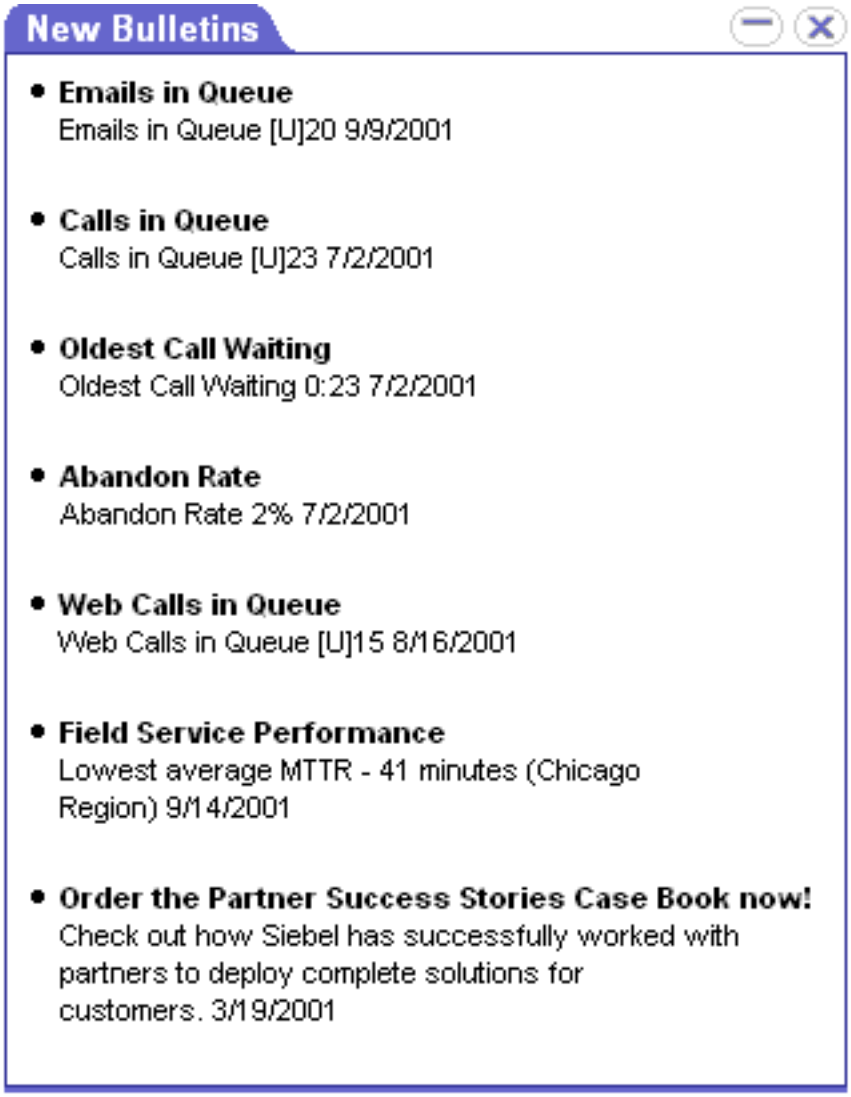
Message List Template

The Applet List Message template uses the AppletListMessage Web template. Siebel CRM uses it on a home page to display news or timely information. Each record displays a bullet and provides a placeholder for a link and short descriptive text. It supports a title that you can map to ID 90 or ID 184 and layout controls.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
CCAppletListMessage
 CCApplet_Spacer
 CCLayoutTitlePortal
 CCApplet_Spacer
 CCLayoutButtons
 CCBottomApplet
 CCTitle_Portal
 CCLayoutButtons
 CCListButtonsTopNoRecNav
 CCButtons
 CCListButtonsTopRight
 CCListBodyBullet
 CCBottomApplet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

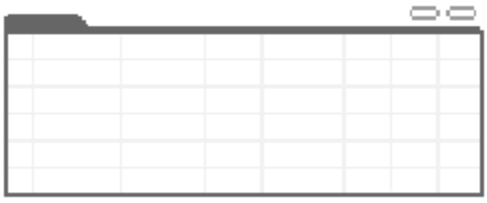
ID	Placeholder
2	Back
90	Title
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 151	Control
157	Label
160 through 164	Control
184	Drilldown Title
203	MinimizeApplet
204	MaximizeApplet
207	MoveAppletUp
208	MoveAppletDown

ID	Placeholder
211	ShowApplet
212	HideApplet
501	Field
502 through 511	Field
555	Label
580	New
599	Save
1100	Outside Applet Help Text

Portal List Template

The Applet List Portal template uses the AppletListPortal Web template. Siebel CRM uses it on a portal page. It displays a title, layout controls, and an optional line of buttons beneath the title. It supports a title that you can map to ID 90 or 184.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletListPortal
 CCApplet_Spacer
 CCLayoutTitlePortal
 CCApplet_Spacer
 CCLayoutButtons
 CCBottomApplet
 CCTitle_Portal
 CCLayoutButtons
 CCListButtonsTopNoRecNav
 CCButtons
 CCListButtonsTopRight
 CCListHeaderNoSort
 CCListBodyNoRowHilite
```

`CCBottomApplet`

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
90	Title
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
142 through 143	Control
144	Selected Row
145	Control
146	Save
147	Pick Control
150 through 151	Control

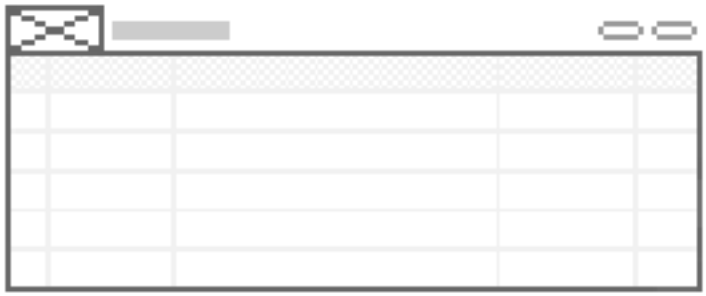
ID	Placeholder
157	Label
160 through 164	Control
184	Drilldown Title
203	MinimizeApplet
204	MaximizeApplet
207	MoveAppletUp
208	MoveAppletDown
211	ShowApplet
212	HideApplet
501 through 540	Field
555	Label
580	New
599	Save
1100	Outside Applet Help Text

Portal List Template with Graphics

The Applet List Portal (Graphical) template uses the AppletListPortalGraphical web template. It displays a title, layout controls, and an optional line of buttons beneath the title. This is a specialized list template in that it can display a graphical applet title. You can map the:

- Applet image to ID 89.
- Applet title to ID 90 or 184.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
AppletListPortalGraphical
 CCApplet_Spacer
 CCLayoutTitlePortal
 CCApplet_Spacer
 CCLayoutButtons
 CCBottomApplet
 CCTitle_PortalGraphical
 CCLayoutButtons
 CCListButtonsTopNoRecNav
 CCButtons
 CCListButtonsTopRight
 CCListHeaderNoSort
 CCListBodyNoRowHilite
 CCBottomApplet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
89	Image

ID	Placeholder
90	Title
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
142 through 143	Control
144	Selected Row
145	Control
146	Save
147	Pick Control
150 through 151	Control
157	Label
160 through 164	Control
184	Drilldown Title

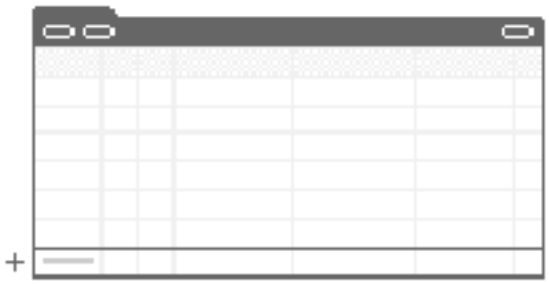
ID	Placeholder
203	MinimizeApplet
204	MaximizeApplet
207	MoveAppletUp
208	MoveAppletDown
211	ShowApplet
212	HideApplet
501 through 540	Field
555	Label
580	New
599	Save
1100	Outside Applet Help Text

Totals List Template for Base or Edit List Mode

The Applet List Totals (Base/EditList) template uses the AppletListTotals (Base/EditList) web template. You can map up to 40 fields in this template. For more information about configuring these fields, see *Configuring How Siebel CRM Uses the Columns Displayed Feature*.

This template supports the parent, child, and grandchild styles.

The following image includes the generic layout that this template uses.



The following image illustrates how you can use this template for a read-only or editable list that displays column totals in the last row. You must make sure you apply a Totals label to the placeholder in the first column.



This template uses the following structure:

```
AppletListTotals (Base/EditList)
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCListButtonsTop
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCListButtonsTopRight
 CCListHeaderTotals
 CCListBodyTotals
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
131	New
132	Edit

ID	Placeholder
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
142 through 143	Control
144	Selected Row
145	Control
146	Save
147	Pick Control
150 through 151	Control
160 through 164	Control
199	Totals Label
501 through 540	Control
580	New
599	Save
611 through 650	Control
1100	Outside Applet Help Text
1500	Required or Legend

Calendar Templates

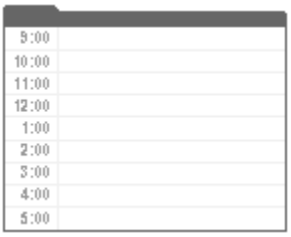
This topic describes calendar templates. It includes the following topics:

- *Daily Calendar Template*
- *Daily Calendar Template for Portals*
- *Weekly Calendar Template*
- *Monthly Calendar Template*
- *Service Calendar Template*

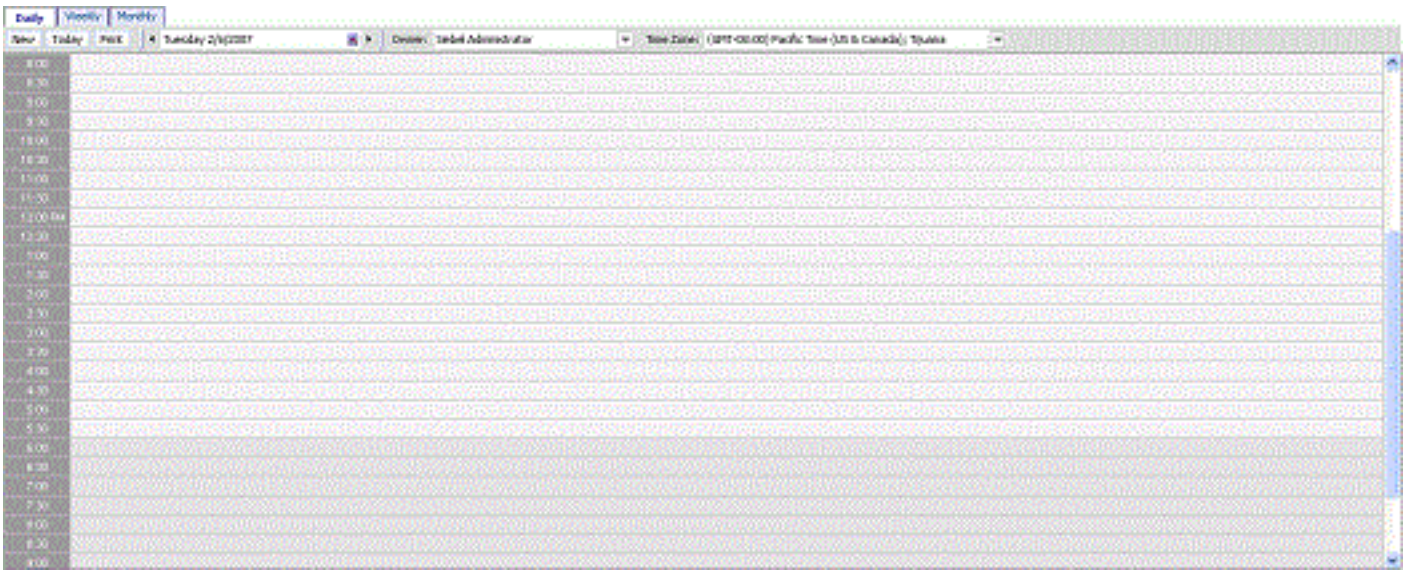
Daily Calendar Template

The eCalendar Daily Applet template uses the eCalendarDailyApplet web template. It supports the parent, child, and grandchild applet styles.

The following image includes the generic layout that this template uses.



The following image includes an example of this template that uses the parent style.



This template uses the following structure:

```
eCalendarDailyApplet
 CCApplet_NamedSpacer
 CCTitle_Named
```

`CCBottomApplet`

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
101	Owner Label
102	Owner Field
103	Date Label
104	Date Field (Day)
105	Date Field (Month)
106	Date Field (Year)
107	Time Zone Label
108	Time Zone Field
130	Go
131	Previous
132	Next
133	New Appt
996	Owner Selector
997	Owner Field 2
998	Today
10000 through 10002	Optional Control
20000 through 20002	Optional Control

Daily Calendar Template for Portals

The Applet Calendar Daily (Portal) template uses the AppletCalendarDaily (Portal) web template. It displays a condensed calendar that you can use on a home page. It supports a graphical header that you can map to ID 89.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletCalendarDaily (Portal)
 CCLayoutTitlePortal
 CCLayoutButtons
 CCBottomApplet
 CCCalendarAppletTitleGraphical
 CCLayoutButtons
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
89	Image
90	Title
101	Owner Label
102	Owner Field
103	Date Label
104	Date Field (Month)
105	Date Field (Day)
106	Date Field (Year)
107	TimeZoneLabel
108	TimeZone

ID	Placeholder
130	Go
131	Previous
132	Next
133	New Appt
157	Label
158	GoToWeeklyView
159	GoToMonthlyView
184	DrillDown Title
203	MinimizeApplet
204	MaximizeApplet
207	MoveAppletUp
208	MoveAppletDown
211	ShowApplet
212	HideApplet
555	Label
999	GoToToday

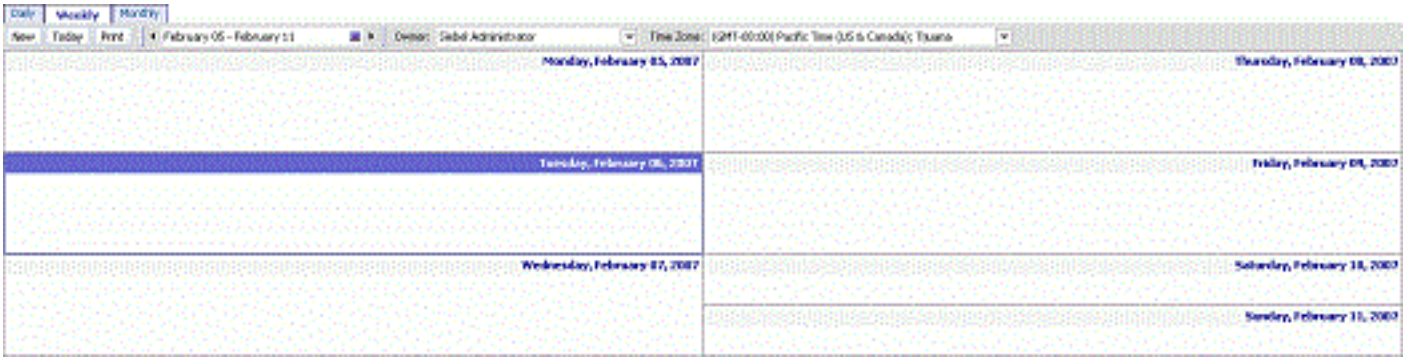
Weekly Calendar Template

The eCalendar Weekly Applet template uses the eCalendarWeeklyApplet web template. It displays days of the week down the side of the applet. It embeds daily activities next to each day. This template supports the predefined applet styles. You must map the applet title to ID 90.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
eCalendarWeeklyApplet
 CCApplet_NamedSpacer
 CCTitle_Named
 CCBottomApplet
```

The following image lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

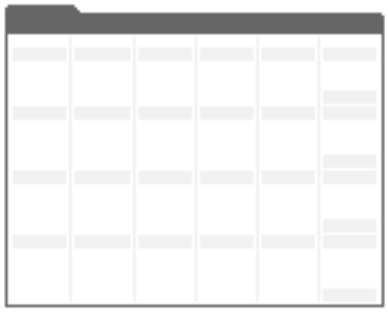
ID	Placeholder
101	Owner Label
102	Owner Field
103	Date Label
104	Date Field (Day)
105	Date Field (Month)
106	Date Field (Year)
107	Time Zone Label
108	Time Zone Field

ID	Placeholder
130	Go
131	Previous
132	Next
133	New Appt
141	New Appt Bitmap
142	Repeat Bitmap
145	Print
301	Start Time
302	End Time
303	Description
996	Owner Selector
997	Owner Field 2
998	Today
10000 through 10002	Optional Control
20000 through 20002	Optional Control

Monthly Calendar Template

The eCalendar Monthly Applet template uses the eCalendarMonthlyApplet web template. It supports the predefined applet styles. You must map the applet title to ID 90.

The following image includes the generic layout that this template uses.



The following table includes an example of this template.



This template uses the following structure:

```
eCalendarMonthlyApplet
 CCApplet_NamedSpacer
 CCTitle_Named
 CCCalendarMonthly_weekday
 CCCalendarMonthly_weekend
 CCBottomApplet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

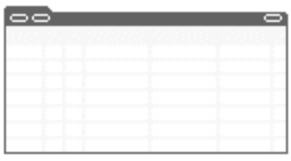
ID	Placeholder
101	Owner Label
102	Owner Field
103	Date Label
104	Date Field (Day)
105	Date Field (Month)
106	Date Field (Year)

ID	Placeholder
107	Time Zone Label
108	Time Zone Field
130	Go
131	Previous
132	Next
133	New Appt
145	Print
301 through 305	Weekday labels for Monday through Friday.
306	Sat/Sun Label
996	Owner Selector
997	Owner Field 2
998	Today

Service Calendar Template

The Service Calendar Applet template uses the ServiceCalendarApplet web template. It supports the predefined applet styles. IDs 301 through 307 map the days of the week that display as column headers.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ServiceCalendarApplet
 CCApplet_NamedSpacer
 CCTitle_Named CCBottomApplet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
301 through 307	Day labels for Sunday through Saturday.

Chart Templates

This topic describes chart templates. It includes the following topics:

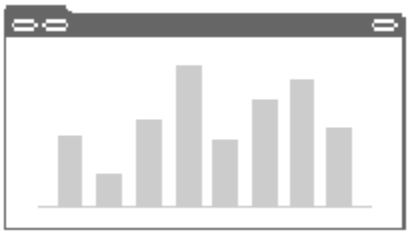
- *Chart Template*
- *Gantt Chart Template*
- *Gantt Chart Activity Template*
- *Gantt Chart Template for Portals*

Chart Template

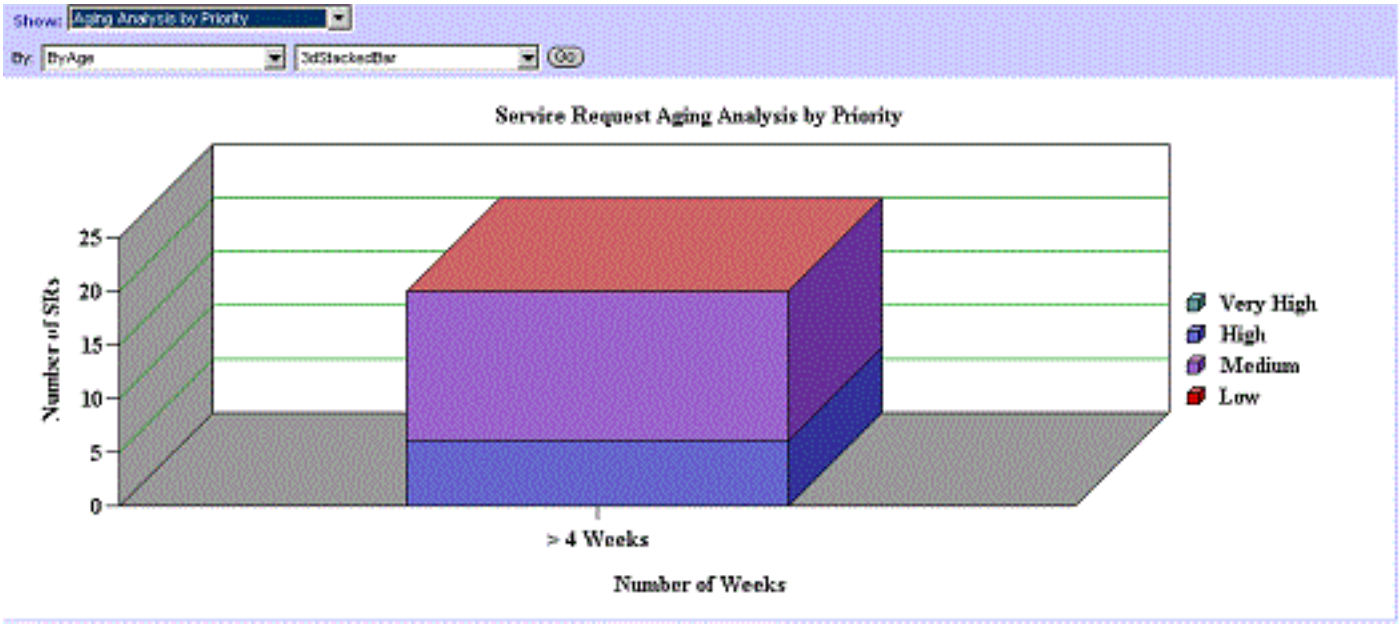
The Applet Chart template uses the AppletChart web template. It supports the parent, child, and grandchild styles. You can map chart controls to ID ranges 501 through 520 and 551 through 555. You map the chart to ID 599.

This template can work with a toggle applet relationship. Siebel CRM displays the other toggle applets in a drop-down list. It maps the drop-down label to ID 2.

The following image includes the generic layout that this template uses.



The following image includes an example of this template that uses the child style.



This template uses the following structure:

```
AppletChart
 CCApplet_NamedSpacer
 CCTitle_Named
 CCChartBasic
 CCTogglebar_drop2
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

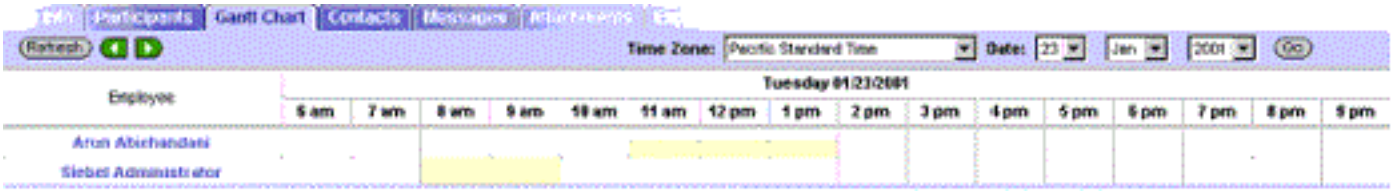
ID	Placeholder
501 through 520	Control
551 through 555	Control
599	Chart
1500	Required or Legend

Gantt Chart Template

The eGantt Chart Applet template uses the GanttChartApplet web template. It supports the parent, child, and grandchild styles. It supports relocating objects starting with Internet Explorer 5. It supports optional controls that you can map to IDs 306 through 314.

Other Gantt chart templates use the eGantt Chart Applet template.

The following image includes an example of this template.



This template uses the following structure:

```
GanttChartApplet
 CCGanttAppletTitle
 CCBottomApplet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
301 through 302	Employee Header
303	Previous
304	Next
306 through 314	Label or Control
405	Control
2101 through 2130	Control

Gantt Chart Activity Template

The eActivityGanttChart Applet template uses the eActivityGanttChartApplet web template. It includes specialized Gantt code that prevents Siebel CRM from using it outside the context of a Gantt applet.

This template uses the following structure:

```
eActivityGanttChartApplet
 CCApplet_NamedSpacer
 CCGanttAppletTitle
 CCBottomApplet
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
301 through 302	Employee Header
303	Previous
304	Next
306 through 314	Label or Control
405	Control
2101 through 2130	Control

Gantt Chart Template for Portals

The eGanttChart Applet (Portal) template uses the eGanttChartApplet (Portal) web template. It supports a title that can map to a drilldown. You can use it to map layout controls on a portal page. You can use IDs 203 through 212 to map these controls.

This template uses the following structure:

```
eGanttChartApplet (Portal)
 CCLayoutTitlePortal
 CCApplet_Spacer
 CCLayoutButtons
 CCBottomApplet
 CCApplet_Spacer
 CCTitle_Portal
 CCLayoutButtons
CCBottomApplet
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
90	Title
157	Label
184	DrillDown Title
203	MinimizeApplet
204	MaximizeApplet

ID	Placeholder
207	MoveAppletUp
208	MoveAppletDown
211	ShowApplet
212	HideApplet
301 through 302	Employee Header
303	Previous
304	Next
306 through 314	Label or Control
405	Control
555	Label
2101 through 2130	Control

Container Templates

This topic describes page container templates. It includes the following topics:

- *Container Template*
- *CC Container Page Logic Template*

Container Template

The Page Container template uses the PageContainer web template. It defines the setup for frames. An employee application requires frames. The employee container templates create frames for the banner, screen bar, view bar, and content. Some employee applications might also use frames for a toolbar, a message bar, the search center, the persistent customer dashboard, and the iHelp pane. To display an optional frame, Siebel CRM calls a predefined UI method at run time.

This template uses the following structure:

```
PageContainer
 CCStylesChoice
 CCFrameBanner
 CCFrameViewbar
```

```
CCStylesChoice
CCFrameToolbar
CCStylesChoice
CCFrameThreadbar
CCStylesChoice
CCThreadbar
CCFrameScreenbar
CCStylesChoice
CCScreenbar_Tabs
CCFrameMsgbar
CCStylesChoice
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Show Label
21 through 22	Page Item
23	Page Item (History Label)
33 through 34	Control
35	Favorites Label
36 through 38	Control

CC Container Page Logic Template

The CC Container Page Logic template uses the CCContainerPageLogic web template. It examines preferences and sends the logical frameset.

This template uses the following structure:

```
CCContainerPageLogic
 CCFrameContent_VSDT
 CCFrameContent_VSD
 CCFrameContent_VST
 CCFrameContent_VS
 CCFrameContent_VDT
 CCFrameContent_VD
 CCFrameContent_VT
 CCFrameContent_V
```

Popup Templates

This topic describes popup templates. It includes the following topics:

- *Popup Form Template*
- *Popup Form, Grid Layout Template*
- *Popup List Template*
- *Popup Spell Checker Template*
- *Popup Query Template*

Popup Form Template

The Popup Form template uses the AppletPopupForm web template. It defines a one column form that Siebel CRM uses in base or edit pop-up mode.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletPopupForm
 CCStylesChoice
 CCButtons
 CCButtons_Popup
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control

ID	Placeholder
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
152	OK
153	Cancel
154 through 158	Control
580	New
599	Save
1001 through 1009	FormSection
1090 through 1099	Required or Label or Field
1100	Label With Rule
1101 through 1110	Required or Label or Field
1111 through 1115	Required or Label or Field
1150	Label With Rule
1151 through 1160	Required or Label or Field
1500	Required or Legend
2001 through 2002	FormSection

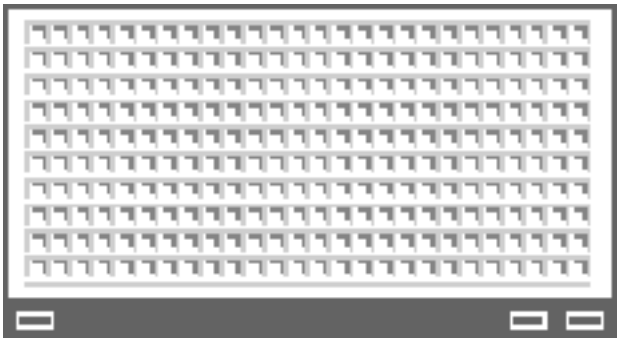
ID	Placeholder
2101 through 2110	Required or Label or Field
2111 through 2115	Required or Label or Field

Popup Form, Grid Layout Template

The Applet Popup Form Grid Layout template uses the AppletPopupFormGridLayout web template. It uses the following tag as a placeholder for all controls in a popup form applet that Siebel CRM displays in a grid:

```
<div od-type=form-applet-layout>
```

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletPopupFormGridLayout
 CCApplet_NamedSpacer
 CCButtons
 CCButtons_Popup
```

The following table lists the items that Siebel CRM can map for this template to the footer of the Applet Popup Form Grid Layout template. For more information, see *About Mapping IDs to Placeholders*.

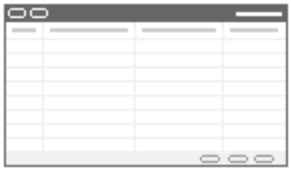
ID	Placeholder
2	Back
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)

ID	Placeholder
109 through 111	Control
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
152	OK
153	Cancel
154 through 158	Control
580	New
599	Save

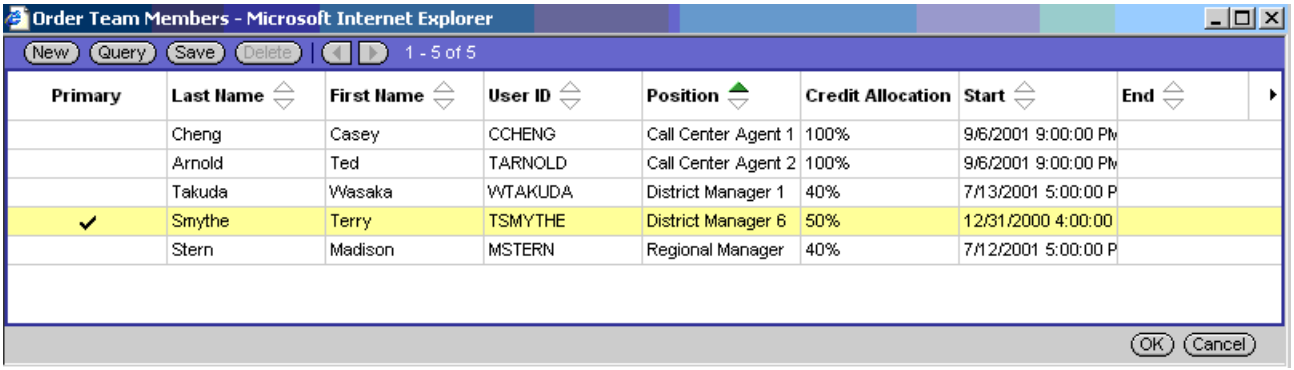
Popup List Template

The Popup List template uses the PopupList web template. It defines how Siebel CRM displays a list in Base or Edit List pop-up mode.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
PopupList
 CCListButtonsTop
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCListButtonsTopRight
 CCListHeader
 CCListBody
 CCButtons_Popup
```

The following image lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
131	New
132	Edit

ID	Placeholder
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
144	Selected Row
145	Control
146	Save (Optional)
147	Pick
150 through 151	Control
152	OK
153	Cancel
154 through 158	Control
160 through 164	Control
501 through 540	Field
580	New
599	Save
611 through 650	Control

Popup Spell Checker Template

The Spell Checker Popup Applet template uses the AppletSpellCheck web template. It is a specialized salutation applet that creates the spell check pop-up list.

This template uses the following structure:

```
CCAppletSpellCheck
```

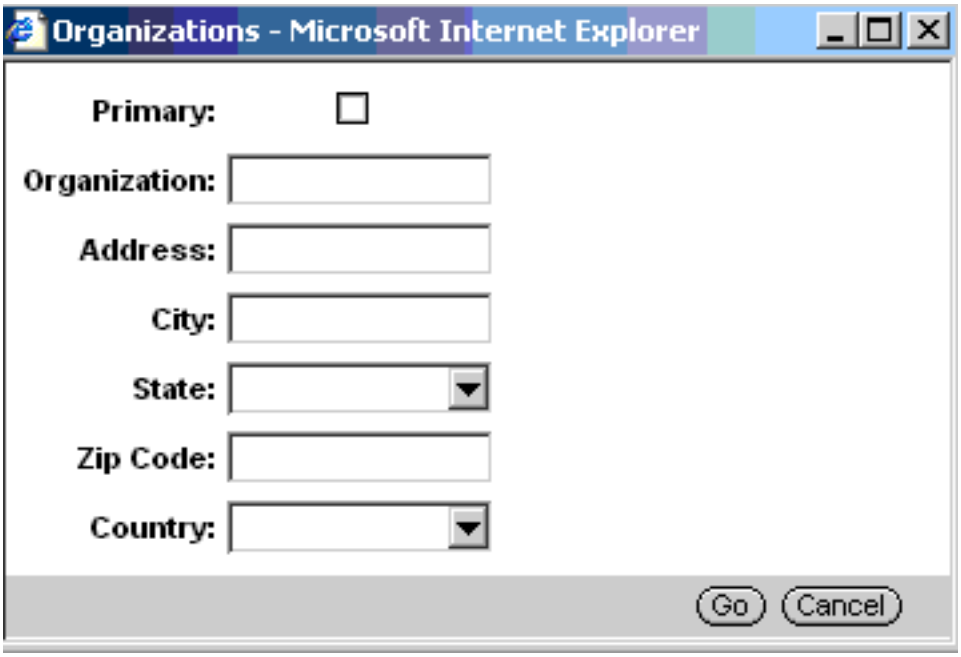
The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text
132 through 133	Control
134	Div
135 through 136	Control
137	Div
138 through 139	Control
140	Div
141 through 142	Control
143	Div
144 through 145	Control
146	Div
152 through 153	Control
154	Div
155	Control
156	Control

ID	Placeholder
1201	Replacement Word Label
1211	Suggested Word Label
1221	Dictionary Label
1300	Text Segment

Popup Query Template

The Popup Query template uses the PopupQuery web template. The following image includes an example of this template.



Search Templates

This topic describes search templates. It includes the following topics:

- *Search Center, Top Template*
- *Search Center, Bottom Template*
- *Advanced Search Template*
- *Find Template*

- *Save Search Template*
- *Search Preference Template*
- *Search Results Templates*

Search Center, Top Template

The Applet Form Search Top template uses the AppletFormSearchTop web template. It defines a specialized applet that Siebel CRM uses to display the first part of the Search Center. You can map the Search Center title only to ID 90. You can map the control that hides the Search Center frame only to ID 141.

This template uses the following structure:

```
AppletFormSearchTop
 CCFormSearch
```

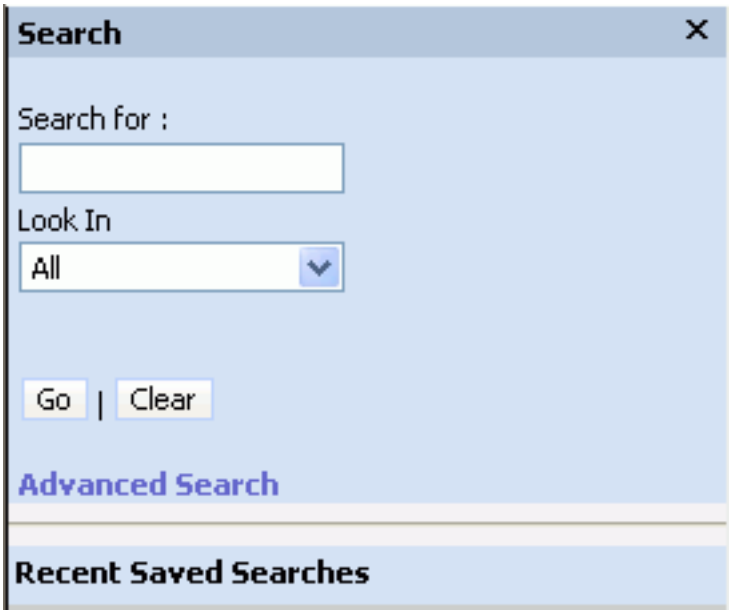
The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text
141	Hide Icon.
1201 through 1230	Label
1301 through 1330	Field

Search Center, Bottom Template

The Search Applet template uses the AppletSearchBasic web template. It defines a specialized applet that Siebel CRM uses to display the ending part of the Search Center.

The following image includes the Search Center.



This template uses the following structure:

```
AppletSearchBasic
 CCFormSearch
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text
132	Menu
133	New
141 through 142	Control
143	Control
1101 through 1130	Label or Field

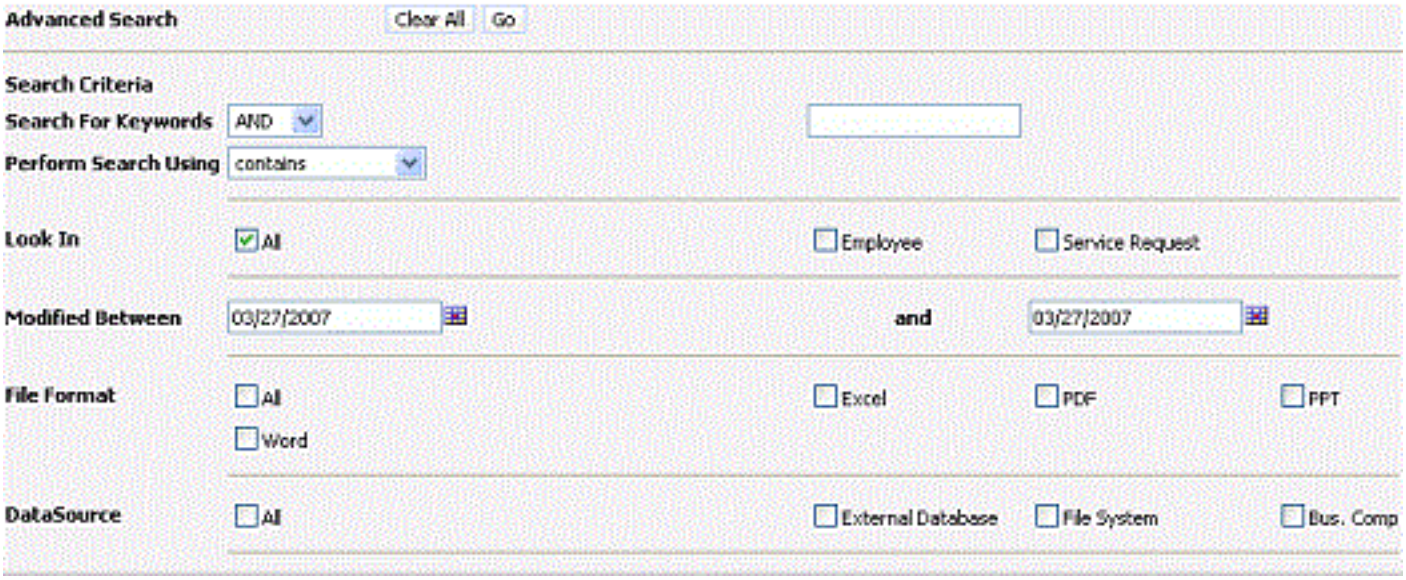
Advanced Search Template

The Advanced Search template uses the AppletSearchAdvanced web template. It defines a specialized applet that displays advanced search.

This template uses the following structure:

AdvancedSearch

The following image includes the Advanced Search applet.



The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
100	Label
105	ClearAll
115	Go
120	Label
125	Label
130	Control
135	Field
145	Label
150	Control
155	Label
160	HTML Checkbox

ID	Placeholder
165	Label
170	Field
175	Label
180	Field
185	Label
190	HTML Checkbox
195	Label
200	HTML Checkbox

Find Template

The Applet Find template uses the AppletFind web template. It defines a specialized applet that determines the ending of the search applet. The last section of the Search Center displays the fields that the user can choose to do an applet query.

This template uses the following structure:

```
AppletFind
 CCFormSearch
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

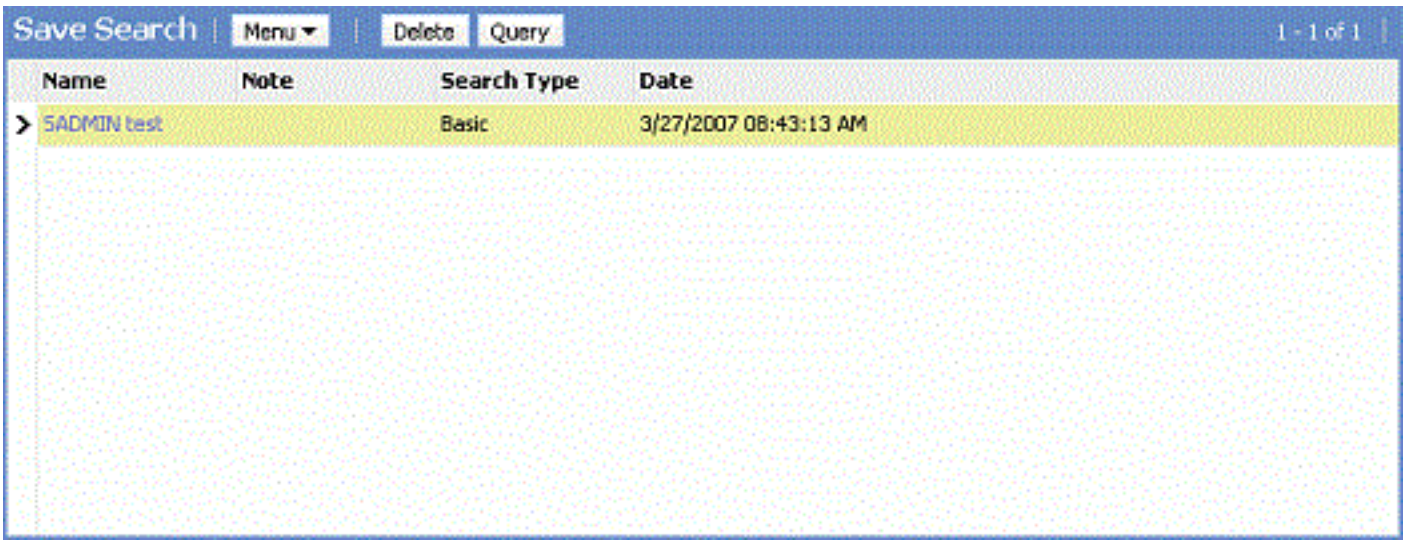
ID	Placeholder
91	Inside Applet Help Text
132	Menu
133	New
141 through 142	Control
143	Control

ID	Placeholder
1101 through 1130	Label or Field

Save Search Template

The Save Search template uses the SearchResultsSaveSearch web template. It defines a specialized applet that displays searches that the user saves.

The following image includes the Save Search applet.



This template uses the following structure:

```
SearchResultsSaveSearch
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

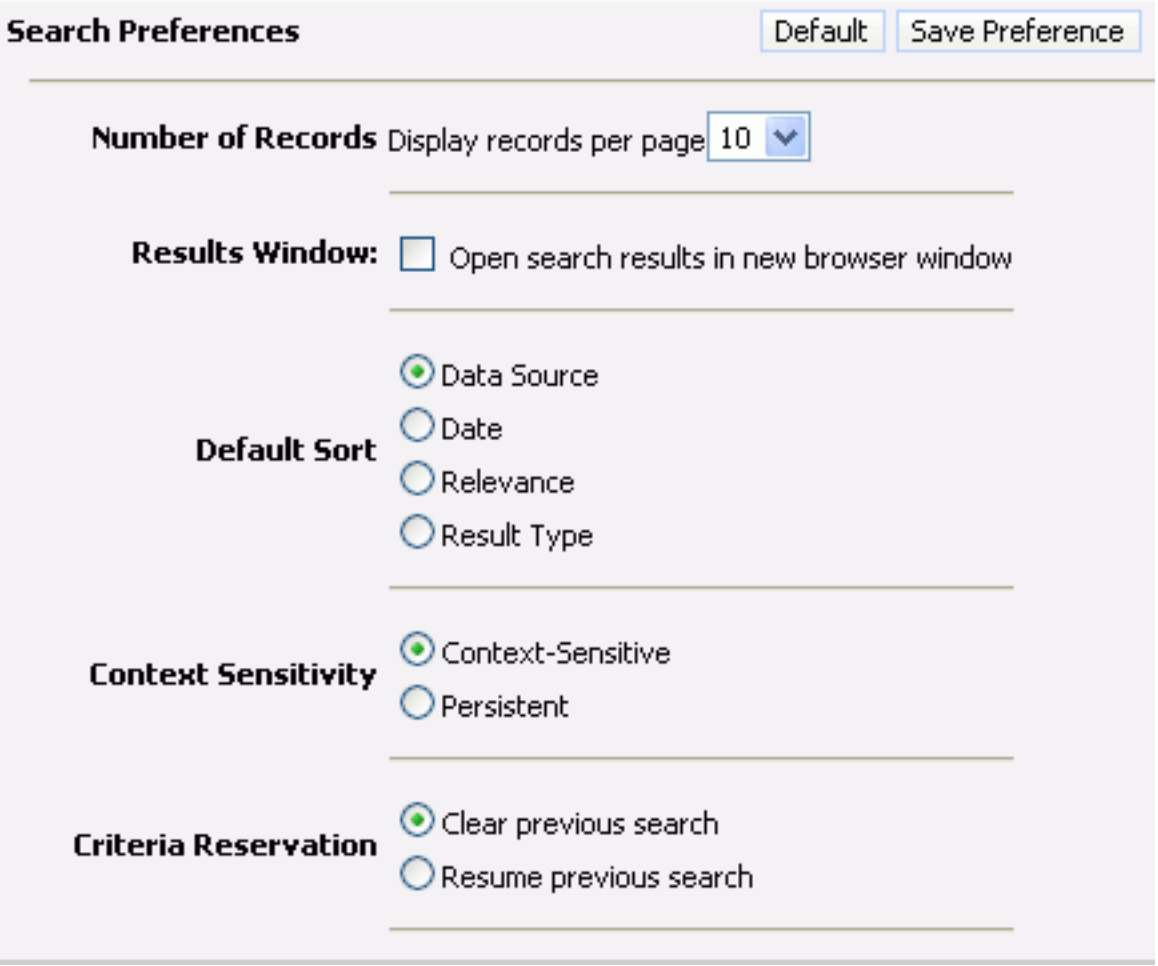
ID	Placeholder
1000	Label
1005	Field
1010	Label
1015	Field
1020	Control

ID	Placeholder
1025	Control

Search Preference Template

The Search Preference template uses the SearchPreference web template. It sets search preferences.

The following image includes the Search Preference applet.



This template uses the following structure:

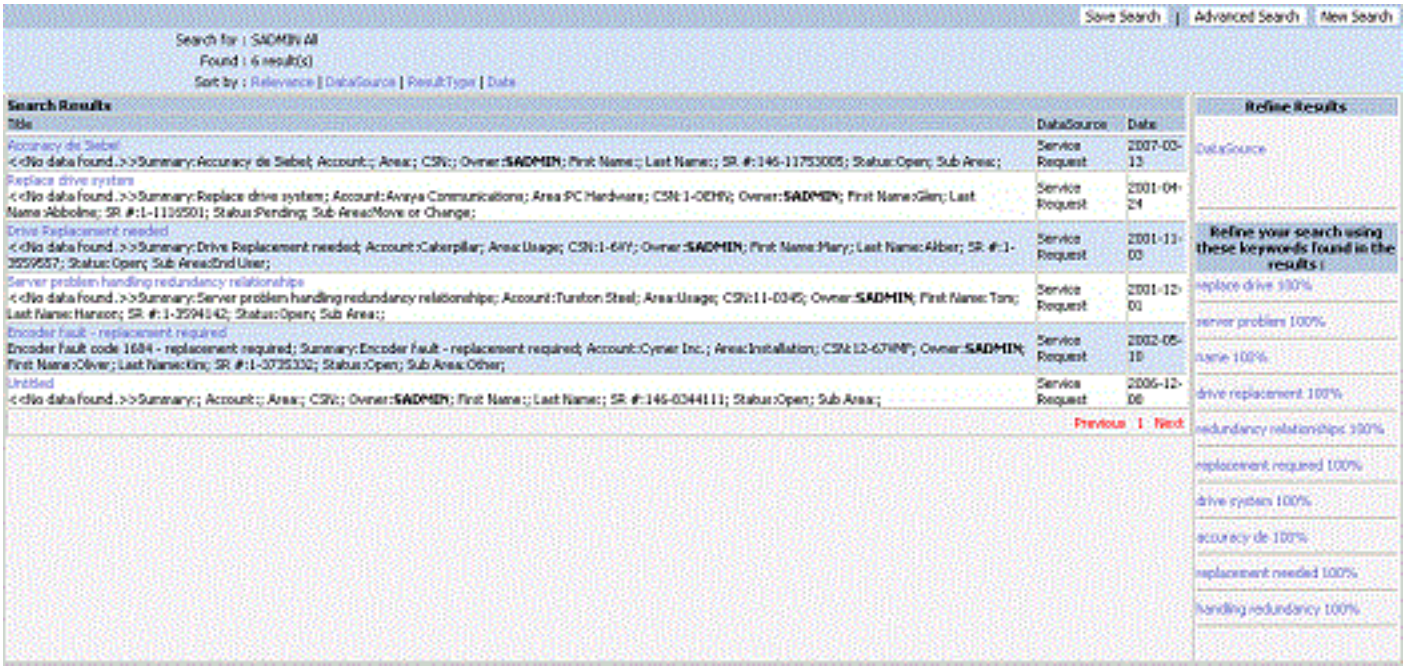
```
SearchPreference
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1000	Search Preferences (Label)
1001	Default
1002	Save Preference
1003	Number of Records (Label)
1004	Display records per page (Label)
1005	Select drop-down menu
1006	Results Window (Label)
1007	HTML Checkbox
1008	Open search results in new browser window (Label)
1009	Default Sort (Label)
1010	HTML RadioButton
1018	Context Sensitivity (Label)
1019	HTML RadioButton
1020	Criteria Reservation (Label)
1021	HTML RadioButton

Search Results Templates

The Search Results Header, Search Results Body, and Search Refine Category applets are specialized applets that display search results. The following image includes an example of these applets.



Search Results Header

The Search Results Header applet uses the SearchHeaderResults web template. It includes a summary of search results.

This template uses the following structure:

```
SearchHeaderResults
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2001	Label
2002	Field
2003	Label
2004	Field
2005	Label
2006	Field
2007	Field
2008	Field

ID	Placeholder
2009	Field
2010	Label
2011	Label
2012	Label

Search Results Body

The Search Results Body applet uses the SearchResults web template. It displays search result details.

This template uses the following structure:

```
SearchResults
 Search_ListHeader
 Search_ListBodySearchResults
 SearchResultsFooter
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
151	Label
152	Field
153	Field
502	ListHeader
503	ListHeader
504	ListHeader
2010	Label
3000	Label

Search Refine Category

The Search Refine Category applet uses the Search_RefineCategoryApplet web template. It allows the user to refine a search.

This template uses the following structure:

```
Search_RefineCategoryApplet
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1000	Label
1005	Hide Icon
1010	Label
1015	Hide Icon

Search Results List Template

The Applet List Search Results template uses the AppletListSearchResults web template. It defines the search results list that Siebel CRM displays in the Search Center pane. To conserve vertical space, it embeds the applet title in the button bar after the menu button.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletListSearchResults
 CCButtons
 CCRecordNav
 CCListHeader
 CCListBodySearchResults
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back

ID	Placeholder
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
142 through 143	Control
144	Select
145	Control
146	Control
147	Pick
501 through 540	Control

ID	Placeholder
580	New
599	Save
611 through 640	Control

Search Results View Template

The Search Results View template uses the SearchResultsView web template. It a specialized view template that Siebel CRM uses to display search results.

Search Results Templates includes an example of this template.

This template uses the following structure:

```
SearchResultsView
 CCStylesChoice
```

The following tab;e lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1 through 3	Applet

Tree Templates

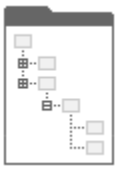
This topic describes tree templates. It includes the following topics:

- *Applet Tree Template*
- *Applet Tree, Marketing Template*
- *View Tree Template*
- *View Tree Two Template*

Applet Tree Template

The AppletTree2 template uses the AppletTree2 web template. It determines applet tabs and borders.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletTree2
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCListButtonsTopNoRecNav
 CCButtonsCCListButtonsTopRight
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

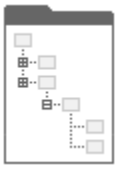
ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150	Control
151	Control

ID	Placeholder
160 through 164	Control
580	New
599	Save
1100	Outside Applet Help Text
1500	Required or Legend

Applet Tree, Marketing Template

The Applet Tree Marketing template uses the AppletTreeMarketing web template. It is a specialized tree applet that determines tabs and borders. It supports a toggle bar.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletTreeMarketing
 CCTitle
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
101	Label
102	Control
132	Control
133	Control
142 through 143	Control
201	Field

ID	Placeholder
1500	Required or Legend

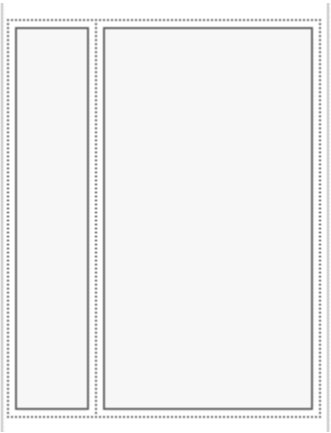
View Tree Template

The View Tree template uses the ViewTree web template. It supports multiple columns:

- The first column uses 25 percent of the window width and contains a tree applet.
- The second column uses 75 percent of the window width and contains a list applet.

It can use noncontext views as tabs.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewTree
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbarAll_Tabs_DropList
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Top (Parent) Applet
3	Parent Applet

ID	Placeholder
4	Bottom (Child) Applet
6	Child or Grandchild Applet
8	Child or Grandchild Applet
10	Child or Grandchild Applet
201	Mini-Applet

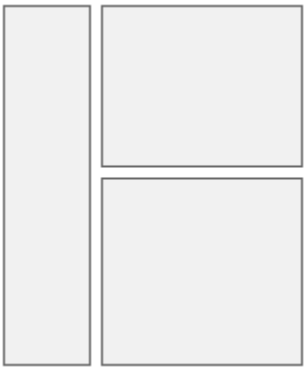
View Tree Two Template

The View Tree 2 template uses the ViewTree2 web template. It supports the following columns:

- The first column uses 25 percent of the window width and contains a tree applet.
- The second column uses 75 percent of the window width and contains a list applet.

It can display noncontext views as tabs.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewTree2
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Applet

ID	Placeholder
3	Applet
201	Mini-Applet

View Templates

This topic describes view templates. It includes the following topics:

- *Overview of Using View Templates*
- *View 1 Over 2 Over 1 Template*
- *View – 25 – 50 – 25 Template*
- *View 25 – 75 Template*
- *View 25 – 75 Framed Template*
- *View 25 – 75 Framed Two Template*
- *View 50 – 50 Template*
- *View 66 – 33 Template*
- *View Admin Template*
- *View AdminTemplate With Grandchild Indented Applets*
- *View Basic Template*
- *View Catalog Admin Template*
- *View Detail Template*
- *View Detail Template With Grandchild Indented Applets*
- *View Detail Two Template*
- *View Detail Two Template With Grandchild Indented Applets*
- *View Detail Template*
- *View Detail Three Template With Grandchild Indented Applets*
- *View Detail Three Multichild Template*
- *View Detail MultiChld Template*
- *View Parent List With Tabs Template*

Overview of Using View Templates

Each shaded area in the view diagrams in *View Templates* represents an area where you can place one or more applets. Siebel CRM expands each applet horizontally to fit the column where you place this applet. The amount of data that it displays determines the amount of vertical space the applet uses.

Siebel Tools does not determine style. It might display color schemes and applet titles differently than Siebel CRM displays them in the client.

Guidelines for Using View Templates

If you configure a view template, then use the following guidelines:

- Map a tree applet map on a view other than the view tree. Siebel CRM does not call a tree applet in a template and the applet that this tree references the same way it calls a predefined applet. You cannot map one of these tree applet as a predefined applet. You can use the View Tree or View Tree 2 applet.
- Increase the number of applets that Siebel CRM displays in a region. To define the number of applets that Siebel CRM can map to a region, most regions use a `<div od-iterator=loopIterator>`. To increase the boundary index of the `loopIterator`, you can set the start and end index values such as [0:4] meaning start index of 0 and end index of 4.
- Use a subframe view. The View 25 – 75 (Framed) template is a subframe view. It displays some applets in the first frame and other applets in the second frame.
- Reuse applets. Each applet placeholder that resides in a view template specifies a style. To determine the color scheme that the applet displays and the applet title visibility, Siebel CRM evaluates this style at run time.

To reuse one applet object definition in many situations, you can apply styles in the view template, and then code the applet template so that it evaluates styles. This configuration reuses code and reduces the number of applet copies that you must maintain.

View templates support parent, child, and grandchild styles.

View 1 Over 2 Over 1 Template

The View 1 Over 2 Over 1 template uses the View_1Over2Over1 web template. It includes multiple regions:

- The first region uses the full window width.
- The second and third regions each use 50 percent of the window width.
- The last region uses the full window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
View_1Over2Over1
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

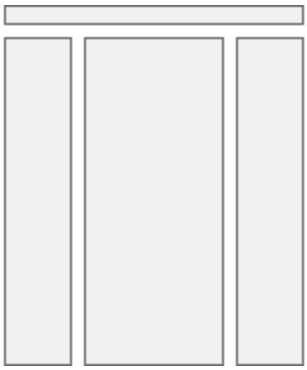
ID	Placeholder
101	Salutation Applet
102 through 106	Applet
201	Mini-Applet
202 through 206	Applet
302 through 306	Applet
402 through 406	Applet
502 through 506	Applet
602 through 606	Applet

View – 25 – 50 – 25 Template

The View 25 - 50 – 25 template uses the View_25_50_25 web template. It includes the following columns:

- The first column uses 25 percent of the window width.
- The second column uses 50 percent of the window width.
- The third column uses 25 percent of the window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
View_25_50_25
 CCHTMLHeader
```

```
CCStylesChoice
CCThreadbar
CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

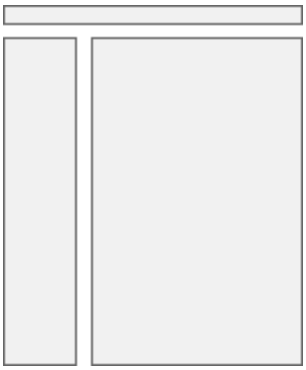
ID	Placeholder
101	Salutation Applet
102 through 111	Applet
201	Mini-Applet
202 through 211	Applet
302 through 311	Applet

View 25 – 75 Template

The View 25 – 75 template uses the View_25_75 web template. It includes the following columns:

- The first column uses 25 percent of the window width.
- The second column uses 75 percent of the window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
View_25_75
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
101	Salutation Applet
102 through 106	Applet
108 through 112	Applet
201	Mini-Applet
202 through 211	Applet

View 25 – 75 Framed Template

The View 25 – 75 Framed template uses the Smart Script Player And Tree View web template. It includes the following columns:

- The first column uses 25 percent of the window width.
- The second column uses 75 percent of the window width.
- The first and second columns reside in separate frames.

The following includes the generic layout that this template uses.

This template uses the following structure:

```
Smart Script Player And Tree View
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
101	Salutation Applet
102 through 106	Applet
108 through 112	Applet
201	Mini-Applet

ID	Placeholder
202 through 211	Applet

View 25 – 75 Framed Two Template

The View 25 75 Framed 2 template uses the View_25_75_Framed2 web template. It includes the following columns:

- The first column uses 25 percent of the window width.
- The second column uses 75 percent of the window width.
- The first column includes two frames. One applet can reside in each frame. The second column is in a single frame.

The following table includes the generic layout that this template uses.

This template uses the following structure:

```
View_25_75_Framed2
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
102 through 103	Applet
201	Mini-Applet
202 through 211	Applet

View 50 – 50 Template

The View 50 – 50 template uses the View_50_50 web template. It includes the following columns:

- The first column uses 50 percent of the window width.
- The second column uses 50 percent of the window width.

The following table includes the generic layout that this template uses.

This template uses the following structure:

```
View_50_50
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

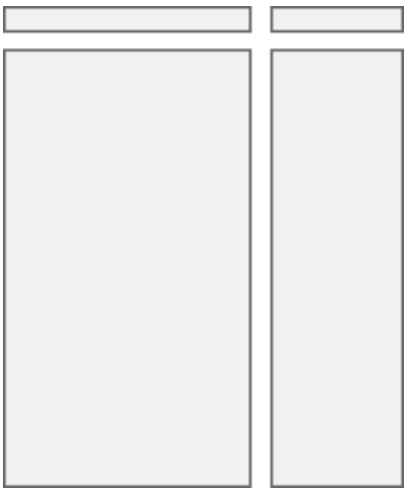
ID	Placeholder
101	Salutation Applet
102 through 106	Applet
201	Mini-Applet
202 through 206	Applet

View 66 – 33 Template

The View 66 – 33 template uses the HomePageView web template. It includes the following columns:

- The first column uses 66 percent of the window width.
- The second column uses 33 percent of the window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
HomePageView
 CCHTMLHeader
 CCStylesChoice
```

```
CCThreadbar
CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
101	Salutation Applet
102 through 121	Applet
201 through 220	Applet
901	Layout Controls

View Admin Template

The View Admin 1 template uses the ViewAdmin1 web template. It displays subviews as tabs across the start of the view.

The following table includes the generic layout that this template uses. You can use it in an administrative view that must display nonrelated views that are difficult to categorize.

This template uses the following structure:

```
ViewAdmin1
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbar_Tabs
 CCSubViewbar_Tabs
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

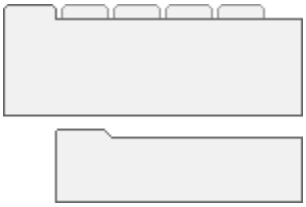
ID	Placeholder
5	Child Applet With Pointer
6	Child Applet
7 through 9	Grandchild Applet
13 through 15	Grandchild Applet

ID	Placeholder
201	Mini-Applet

View AdminTemplate With Grandchild Indented Applets

The View Admin 1 (Grandchild Indented) template uses the ViewAdmin1 (Grandchild Indented) web template. It is similar to the View Admin 1 template except that Siebel CRM indents the second and subsequent applets. You can use this template to display a hierarchical relationship or to display an administrative view that must include nonrelated views that are difficult to categorize. For more information, see *View Admin Template*.

The following table includes the generic layout that this template uses.



This template uses the following structure:

```
ViewAdmin1 (Grandchild Indented)
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCSubViewbar_Tabs
 CCApplet_Spacer
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

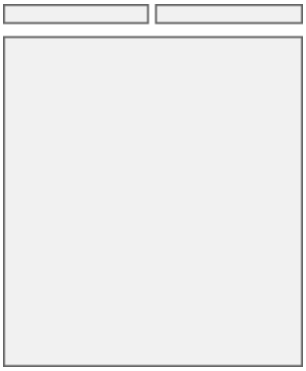
ID	Placeholder
5	Child Applet With Pointer
6	Child Applet
7	Grandchild Applet With Pointer
8 through 9	Child or Grandchild Applet
10 through 12	Grandchild Applet
13 through 15	Grandchild Applet
201	Mini-Applet

ID	Placeholder

View Basic Template

The View Basic template uses the Smart Script Player web template. All applets use the full window width and are stacked on each other.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
Smart Script Player
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCHTMLFooter
```

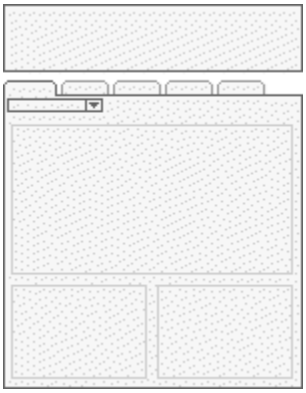
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1 through 20	Applet
101	Salutation Applet
201	Mini-Applet
901	Layout Controls

View Catalog Admin Template

The View Catalog Admin template uses the ViewCatalog web template. It is a specialized view template that Siebel CRM uses only in a catalog view.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewCatalog
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbar_Tabs_DropList
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Grandchild Applet
3	Grandchild Applet
4 through 5	Child Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet
201	Mini-Applet

View Detail Template

The View Detail template uses the PUB eCalendar Monthly View web template or the TOWViewDetail (Parent with Pointer) web template. It displays the following items:

- Parent applet
- Noncontext views that it displays as tabs
- Categorized subviews that it displays in a drop-down list
- Child applet
- Multiple grandchild applets

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
PUB eCalendar Monthly View
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbar_Tabs_DropList
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child Applet
3 through 5	Child or Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet

ID	Placeholder
201	Mini-Applet

View Detail Template With Grandchild Indented Applets

The View Detail (Grandchild Indented) template uses the View Detail (Grandchild Indented) web template. It displays the same items as the View Detail template except that it indents grandchild applets. This indentation indicates a hierarchy. For more information, see *View Detail Template*.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
View Detail (Grandchild Indented)
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbar_Tabs_DropList
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child Applet
3 through 5	Child or Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet

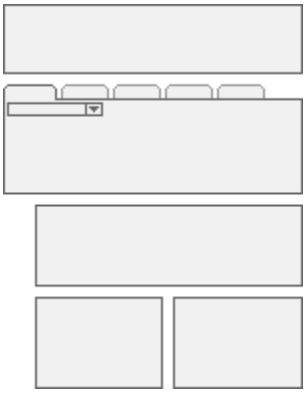
ID	Placeholder
88	Tree Applet
201	Mini-Applet

View Detail Two Template

The View Detail 2 template uses the ViewDetail2 web template. It displays the following items:

- Parent applet
- Noncontext views that it displays as tabs
- Child applet
- Categorized subviews that it displays as tabs
- Multiple grandchild applets

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewDetail2
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbar_Tabs
 CCSubViewbar_Tabs
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

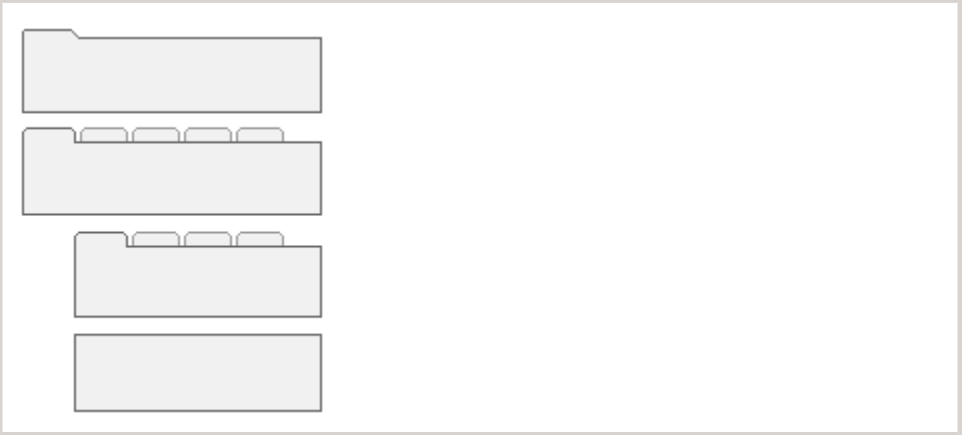
ID	Placeholder
1	Parent Applet
2	Child Applet

ID	Placeholder
3	Grandchild Applet
4 through 5	Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet
201	Mini-Applet

View Detail Two Template With Grandchild Indented Applets

The View Detail 2 (Grandchild Indented) template uses the View Detail 2 (Grandchild Indented) web template. It displays the same items as the View Detail Two template except that it indents grandchild applets. This indentation indicates a hierarchy. For more information, see *View Detail Two Template*.

The following table includes the generic layout that this template uses.



This template uses the following structure:

```
View Detail 2 (Grandchild Indented)
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbar_Tabs
 CCSubViewbar_Tabs
 CCApplet_Spacer
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child Applet
3	Grandchild Applet
4 through 5	Child or Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet
201	Mini-Applet

View Detail Template

The View Detail 3 template uses the ViewDetail3 web template. It is a specialized view template that does the following:

- Displays all views as tabs
- Displays a child applet beneath these tabs
- Displays categorized subviews in a drop-down list
- Displays multiple grandchild applets beneath the child applet

You can use it to display an administrative view that must include a collection of views that are not grouped and that visibility rules do not affect.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewDetail3
 CCHTMLHeader
 CCStylesChoice
```

```
CCThreadbar
CCViewbarAll_Tabs
CCSubViewbar_Drop
CCHTMLFooter
```

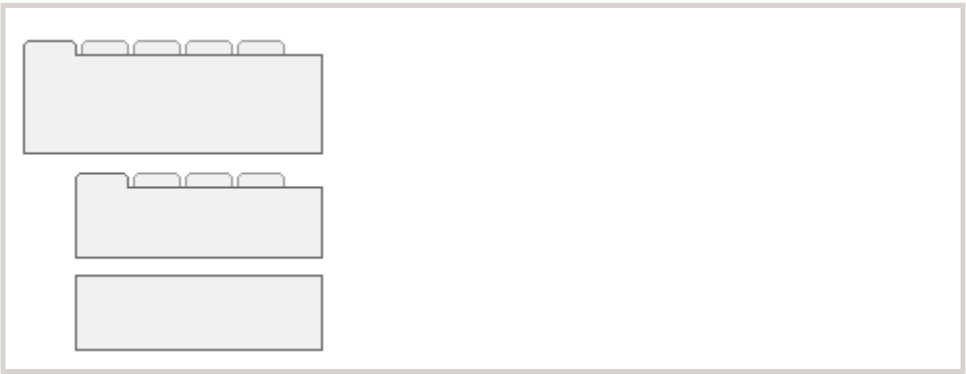
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child Applet
3 through 5	Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Child or Grandchild Applet
201	Mini-Applet

View Detail Three Template With Grandchild Indented Applets

The View Detail 3 (Grandchild Indented) template uses the View Detail 3 (Grandchild Indented) web template. It displays the same items as the View Detail Three template except that it indents grandchild applets. This indentation indicates a hierarchy. For more information, see *View Detail Template*.

The following table includes the generic layout that this template uses.



This template uses the following structure:

```
View Detail 3 (Grandchild Indented)
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
```

```
CCViewbarAll_Tabs_DropList
CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child Applet
3 through 5	Child or Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet
201	Mini-Applet

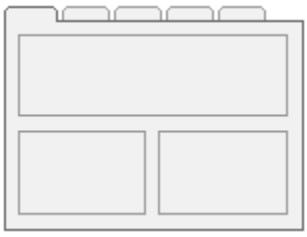
View Detail Three Multichild Template

The View Detail 3 Multi Child template uses the ViewDetail3MultiChild web template. It is a specialized view template that displays the following items:

- Displays all views as tabs
- Displays a child applet beneath these tabs
- Displays categorized subviews in a drop-down list
- Displays multiple grandchild applets in a bounded box.

You can use it to display an administrative view that must include a collection of views that are not grouped and that visibility rules do not affect.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewDetail3MultiChild
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
```

```
CCViewbarAll_Tabs_DropList
CCHTMLFooter
```

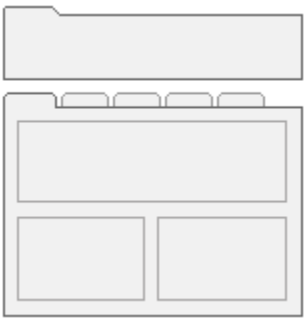
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child Applet
3 through 5	Grandchild Applet
6 through 7	Child or Grandchild Applet
8 through 9	Child or Grandchild Applet
201	Mini-Applet

View Detail MultiChld Template

The View Detail Multi-Child template uses the ViewDetailMultiChld web template. It displays the same items as the View Detail Three Multichild template. This indentation indicates a hierarchy. For more information, see *View Detail Three Multichild Template*.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewDetailMultiChild
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbarAll_Tabs_DropList
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child Applet
3 through 5	Grandchild Applet
6 through 11	Child or Grandchild Applet
201	Mini-Applet

View Parent List With Tabs Template

The View Parent List With Tabs template uses the ViewParentListWithTabs web template. It displays the following items:

- Parent applet
- Noncontext views that it displays as tabs
- Categorized subviews that it displays in a drop-down list
- Child applet
- Multiple grandchild applets

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewParentListWithTabs
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCSubordinateAppletsBorderStart
 CCViewBar_Tabs_DropList_Always
 CCSubViewbar_Drop
```

```
dCCViewbar_Tabs
CCApplet_Spacer
dCCSubViewbar_Drop
CCSubordinateAppletsBorderEnd
CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child Applet
3 through 5	Child or Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet
10 through 20	Grandchild Applet
201	Mini-Applet
702	Child Applet
703 through 705	Child or Grandchild Applet

Specialized Employee Templates

This topic describes specialized templates. It includes the following topics:

- *Columns Displayed Template*
- *Dashboard Template*
- *Email Response Template for Inbound Messages*
- *Email Response Template for Outbound Messages*
- *Salutation Applet Template*
- *Salutation Applet Template With Graphics*
- *Screen Links Template*
- *Send Mail Template*
- *Send Mail Template for Picking Recipients*
- *Site Map Template*

- *View Dashboard Template*
- *View Segment Detail Template*

Columns Displayed Template

The Applet Items Displayed template uses the AppletItemsDisplayed web template. It is a specialized template that displays the Columns Displayed dialog box that is available on most lists through the applet menu. It includes specialized code that prevents Siebel CRM from using it for any other purpose. For more information, see *Configuring How Siebel CRM Uses the Columns Displayed Feature*.

This template uses the following structure:

```
AppletItemsDisplayed
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Save
2	Reset
3	Cancel
10	Available Items Label
11	Available Items Combobox
12	Available Items Hidden Field
20	Move Item to Selected
21	Move All to Selected
22	Move Item to Available
23	Move All to Available
30	Selected Items Label
31	Selected Items Combobox
32	Selected Items Hidden Field
40	Move Item to Top

ID	Placeholder
41	Move Item Up
42	Move Item Down
43	Move Item to Bottom
91	Inside Applet Help Text
100	Error Message
1100	Outside Applet Help Text

Dashboard Template

The Applet Dashboard template uses the AppletDashboard web template. It defines a lightweight version of the dashboard applet that displays the customer context in a call center application. It supports three rows. Each of these rows can include up to four columns. It displays labels at start of fields. You can use ID 211 to map a button that closes the dashboard.

The following image includes an example of this template.



This template uses the following structure:

```
AppletDashboard
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
211	Hide
1200	Label
1201	Label
1202	Label
1300	Field

ID	Placeholder
1301	Field
1302	Field
1700	Label
1701	Label
1702	Label
1800	Field
1801	Field
1802	Field
2200	Label
2201	Label
2202	Label
2300	Field
2301	Field
2302	Field
2700	Label
2701	Label
2702	Label
2800	Field
2801	Field
2802	Field
2901	Button

ID	Placeholder
2902	Button

Email Response Template for Inbound Messages

The Applet Email Response - Inbound template uses the Applet Email Response - Inbound web template.

This template uses the following structure:

```
Applet Email Response - Inbound
 CCApplet_Spacer
 CCTitle_Named
 CCFormButtonsTop
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCFormButtonsTopRight
 CCEmailRespFormInBound
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
125	Info-Button
131	New

ID	Placeholder
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
160 through 164	Control
192	Label
194	Label
580	New
599	Save
1131	Field
1221 through 1226	Label
1321 through 1326	Field
1500	Required or Legend

Email Response Template for Outbound Messages

The Applet Email Response - Outbound template uses the Applet Email Response - Outbound web template.

This template uses the following structure:

```
Applet Email Response - Outbound
 CCApplet_Spacer
 CCTitle_Named
```

```
CCFormButtonsTop
CCButtons
CCRecordNav
CCTogglebar_drop
CCFormButtonsTopRight
CCEmailRespFormOutBound
CCEmailRespFormButtonsBottom
CCEmailRespButtonsBottom
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
125	Info-Button
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save

ID	Placeholder
139 through 143	Control
145 through 152	Control
160 through 164	Control
192	Label
194	Label
580	New
599	Save
1200	From
1201	To
1202	CC
1203	Subject
1204	Category
1205	Body
1207	Attachments
1220	SR #
1221	Opportunity
1222	Contact
1223	Account
1224	Category
1225	Closing
1300	Label

ID	Placeholder
1301 through 1305	Field
1306	Message Body
1307	Field
1320 through 1325	Field
1401	Addr Book Icon
1402	BCC
1407	Icon
1500	Required or Legend
1502	Field
1507	Icon

Salutation Applet Template

The Applet Salutation template uses the AppletSalutation web template. It defines the salutation applet that Siebel CRM displays on a home page that includes a personal greeting.

The following is an example of this template.



This template uses the following structure:

```
AppletSalutation
 CCApplet_Spacer
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Salutation

Salutation Applet Template With Graphics

The Applet Salutation (Graphical) template uses the AppletSalutationGraphical web template. It defines a specialized salutation applet that Siebel CRM displays on a home page that includes a personal greeting. You can use ID 89 to map an image to this template.

The following image includes the generic layout that this template uses.

This template uses the following structure:

```
AppletSalutationGraphical
 CCApplet_Spacer
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Salutation
89	Image

Screen Links Template

The Applet Screen Links template uses the AppletScreenLinks web template. You can use it to manually map controls, such as GoToView links. You can define a collection of these links that constitute a table of contents that the user can use to access information.

This template uses the following structure:

```
AppletScreenLinks
 CCApplet_Spacer
 CCTitle
 CCFormButtonsTop
 CCButtons
 CCRecordNav
 CCTogglebar_drop
 CCFormButtonsTopRight
 CCScreenLinks
 CCBottomApplet
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
125	Info-Button
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
160 through 164	Control
192	Label
194	label

ID	Placeholder
580	New
599	Save
1100	Group Label
1101 through 1120	Link
1200	Group Label
1201 through 1220	Link
1300	Group Label
1301 through 1320	Link
1400	Group Label
1401 through 1420	Link
1500	Required or Legend
2100	Group Label
2101 through 2120	Link
2200	Group Label
2201 through 2220	Link
2300	Group Label
2301 through 2320	Link
2400	Group Label
2401 through 2420	Link

Send Mail Template

The Applet Send Mail template uses the AppletSendMail web template. It defines a specialized applet that Siebel CRM uses to create the send mail pop-up list.

This template uses the following structure:

```
AppletSendMail
 CCButtons
 CCPopupButtonsBottom
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
152	OK
153	Cancel
154 through 158	Control
300 through 301	Icon
1200	From: Label
1201	To: Label
1202	Cc: Label
1203	Bcc Field
1204	Subject: Label
1205	Body: Label
1206	Optional Label
1207	Attachments: Label
1300	From Field
1301	To field
1302	CC Field

ID	Placeholder
1303	Bcc Field
1304	Subject Field
1305	Templates Field
1306	Body Field
1307	Attachments Field
1400	Optional Control
1401	AB Control
1404	Control

Send Mail Template for Picking Recipients

The Applet Send Mail Pick template uses the AppletSendEmailPick web template. It defines a specialized applet that the user can use to choose email recipients.

This template uses the following structure:

```
AppletSendEmailPick
 CCButtons
 CCPopupButtonsBottom
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
142 through 143	Control
144	Selected Row
145	Control
146	Save
147	Pick Control

ID	Placeholder
152	OK
153	Cancel
154 through 158	Control
501 through 540	Field
598	Save
1200	Label

Site Map Template

The Site Map template uses the SiteMap web template. It creates a table of contents for the screens and views that exist in Siebel CRM.

This template uses the following structure:

```
SiteMap
 CCStylesChoice
```

You cannot map items for this template.

View Dashboard Template

The View Dashboard template uses the ViewDashboard web template. It defines a specialized view that Siebel CRM uses for the Dashboard applet. It can contain one applet that uses the full window width.

This template uses the following structure:

```
ViewDashboard
 CCHTMLHeader
 CCStylesChoice
 CCHTMLFooter
```

You cannot map items for this template.

View Segment Detail Template

The View SME Segment Detail template uses the ViewSMESegmentDetail web template. It defines a specialized view that Siebel CRM uses in a tree and the expression builder.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
ViewSMESegmentDetail
 CCHTMLHeader
 CCStylesChoice
 CCThreadbar
 CCViewbar_Tabs
 CCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Tree Applet
3	Java Applet

Wizard, Error, and SmartScript Templates

This topic describes other templates. It includes the following topics:

- *AppletWizard Template*
- *Error Page Template*
- *SmartScript Player Template*
- *SmartScript Player Template With Tree Only*

AppletWizard Template

The Applet Wizard template uses the AppletWizard web template. It defines wizards and SmartScript applets. It displays buttons at the end of the form that allow the user to navigate through a procedure. You can use ID 90 to map the applet title so that each step in the wizard can include a unique title. You can map text that occurs outside of the applet, such as the name of the running script, to ID 1100.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletWizard
 CCTitle_Mapped
 CCForm1ColBody
 CCButtons
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
90	Title
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
131	New
132	Edit

ID	Placeholder
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
184	Title
580	New
599	Save
1100	Outside Applet Help Text
1301 through 1350	Required or Label or Field
1500	Required or Legend
2301 through 2350	Required or Label or Field

Error Page Template

The Error Page template uses the Error web template. It displays system errors.

This template uses the following structure:

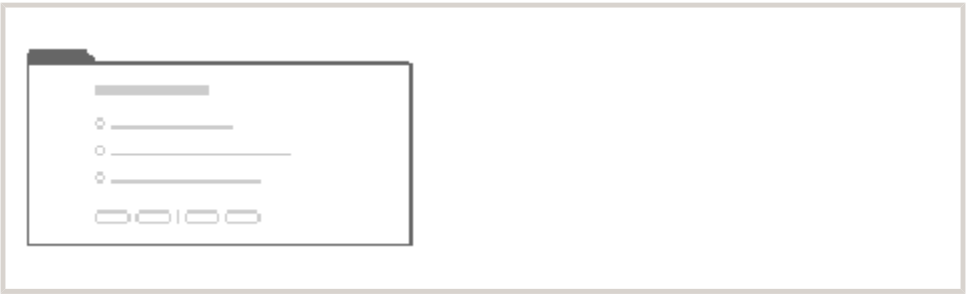
```
Error
 CCHTMLHeader
 CCBottomApplet
 CCHTMLFooter
```

You cannot map items for this template.

SmartScript Player Template

The SmartScript Player Applet (Player Only) template uses the SmartScriptPlayerApple web template. It defines SmartScript applets. It displays buttons at the end of the form that allow the user to navigate through a procedure.

The following table includes the generic layout that this template uses.



This template uses the following structure:

```
SmartScriptPlayerApplet
```

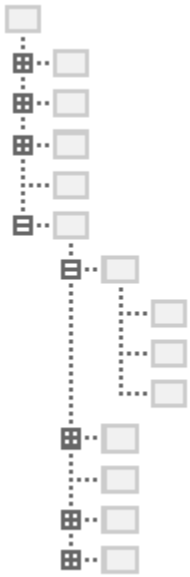
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Finish Script
2	Cancel Script
3	Previous Section
4	Next Section
5	Save Script
6	Save Answers
1500	Required Label

SmartScript Player Template With Tree Only

The Smart Script Player Applet (Tree Only) template uses the SmartScriptPlayerAppletTree web template. It defines a tree applet that does not include an applet title or border.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
AppletTree
```

You cannot map items for this template.

9 Siebel Templates for Customer Applications

Siebel Templates for Customer Applications

This chapter describes the predefined templates that Siebel CRM uses in a customer application. It includes the following topics:

- *Overview of Configuring Siebel Templates for Customer Applications*
- *Customer Form Templates*
- *Customer List Templates*
- *Customer View Templates*
- *Customer Container Templates*
- *Specialized Customer Templates*

Overview of Configuring Siebel Templates for Customer Applications

Most customer applications, such as Siebel eSales and Siebel Self Service, use a set of customer templates for general functionality and a subset of employee templates for messages and greetings.

The following types of applications exist for partner relationship management:

- PRM Manager. Templates that Siebel CRM displays in PRM Manager use the functionality described in *Siebel Templates for Employee Applications*
- PRM Portal. Templates that Siebel CRM displays in PRM Portal use the functionality described in this chapter.

Overview of User Interface Elements

The following table describes an overview of user interface elements that Siebel CRM uses in the Siebel Web Client for a customer application.

Element	Description
Header	A framed area at the start of the page that remains visible while the user scrolls the content area. It includes the following elements: • Banner • Screen bar • View bar
Banner	A starting frame of the header that includes site branding and navigation. It includes the company logo on the first side and the global navigation links in the lower corner of the second.

Element	Description
Global navigation links	Links that Siebel CRM displays in the lower far corner of the banner frame. These links provide functionality that the primary tabs do not provide. Customer applications and partner applications include the following global navigation links: • Shopping Cart • My Account • Help • Contact Us • Log In/Out
Screen bar	A bar that displays the primary tabs that provide access to screens.
View bar	The last frame of the header that Siebel CRM uses to display the simple search applet in most customer applications. In eChannel, the view bar displays the second-level navigation and favorites drop-down list controls.
Simple Search applet	A small applet on the far side of the view bar that can do a simple search. This applet also contains an icon that links to the Search Center page where the user can do an advanced search.
Content area	The largest frame of the page that contains a view template and one or more applet templates. The user can scroll this content area vertically without affecting the position of the header frames.
Salutation and personal greeting	Area at the start of the content area that displays text messages. The message area typically displays a personal greeting on an application home page and a threadbar on pages lower in the application hierarchical structure.
Thread bar	A set of links in the message area that displays the path the user takes through the application hierarchical structure. It allows for easy navigation to previously visited pages.

Customer Form Templates

This topic describes customer form templates. It includes the following topics:

- *Basic Form Template*
- *One Column Form Template*
- *Two Column Form Template*
- *Four Column Form Template*
- *Item Detail Form Template*
- *Search, Top Form Template*
- *Title, Form Template*
- *Four Column, Merged, Form Template for Base, Edit, or New Mode*

Basic Form Template

The Form/1-Column/Basic template uses the DotComAppletFormBasic web template.

The following image includes an example of this template.



One Column Form Template

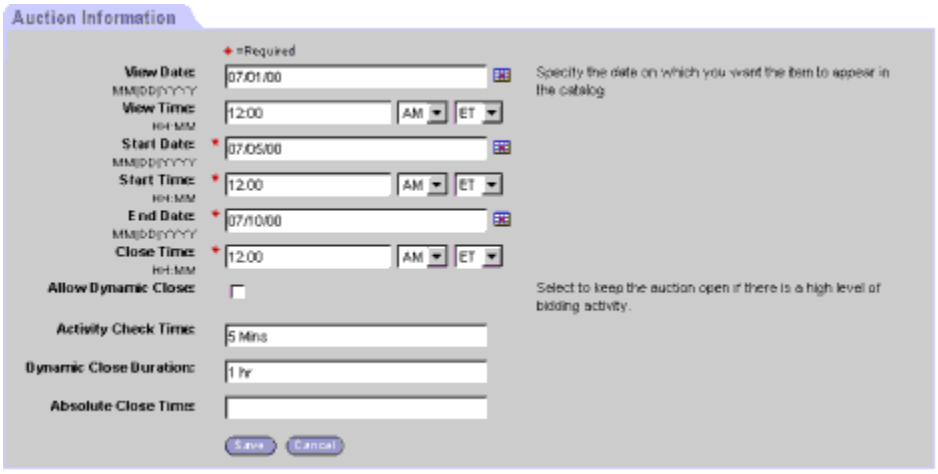
The DotCom Applet Form 1-Column template uses the DotComAppletForm1Col web template. It can do the following:

- Display labels before fields.
- Display buttons at the end of the form.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletForm1Col
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCTogglebar_drop
 dCCForm1Col
 dCCButtons_Form
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 110	Control
131	New
132	Edit
133	Delete
134	Reset

ID	Placeholder
135	Cancel
136	Save
139 through 143	Control
157 through 158	Control
1000	FormSection
1001	FormSection
1002	FormSection
1003	FormSection
1004	FormSection
1005	FormSection
1006	FormSection
1300 through 1305	Required or Label
1306 through 1311	Required or Label
1312 through 1317	Required or Label
1318 through 1323	Required or Label
1324 through 1329	Required or Label
1330 through 1335	Required or Label
1336 through 1341	Required or Label
1500	Required or Legend

Two Column Form Template

The DotCom Applet Form 2-Column template uses the DotComAppletForm2Col web template. It can do the following:

- Display labels before fields.
- Display two columns of label and field pairs followed by one wide column that spans these pairs.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletForm2Col
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCTogglebar_drop
 dCCFormButtonsTop
 dCCButtons_Form
 CCRecordNav
 CCTogglebar_drop
 CCFormButtonsTopRight
 dCCForm2Col
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
91 through 92	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 110	Control
121	First
122	Previous

ID	Placeholder
123	Next
124	Last
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
157 through 158	Control
160 through 164	Control
1001	FormSection
1002	FormSection
1003	FormSection
1004	FormSection
1030	FormSection
1035	FormSection
1100 through 1104	Required or Label
1105 through 1109	Required or Label
1110 through 1114	Required or Label

ID	Placeholder
1115 through 1119	Required or Label
1130 through 1134	Label or Field
1135 through 1139	Label or Field
1500	Required or Legend
2001	FormSection
2002	FormSection
2003	FormSection
2004	FormSection
2100 through 2104	Required or Label
2105 through 2109	Required or Label
2110 through 2114	Required or Label
2115 through 2119	Required or Label

Four Column Form Template

The DotCom Applet Form 4-Column template uses the DotComAppletForm4Col web template. It can do the following:

- Define a large number of control placeholders that can span one column, two columns, or all four columns.
- Map fields for up to four columns.
- Display labels at start of field values.
- Display validation errors at the start of the form.
- Use ID 91 to add text that spans all four columns.

The following image includes the generic layout that this template uses.



The following table includes an example of this template.



This template uses the following structure:

```
DotComAppletForm4Col
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCTogglebar_drop
 dCCFormButtonsTop
 dCCButtons_Form
 CCRecordNav
 CCTogglebar_drop
 CCFormButtonsTopRight
 CCForm4ColBody
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Control
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 110	Control
121	First
122	Previous

ID	Placeholder
123	Next
124	Last
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
150 through 152	Control
157 through 158	Control
160 through 164	Control
1001 through 1009	FormSection
1020	FormSection
1296 through 1300	Required or Label or 2-Column Wide Field
1301 through 1310	Required or Label
1311 through 1315	Required or Label or 2-Column Wide Field
1316 through 1330	Required or Label
1331 through 1335	Required or Label or 2-Column Wide Field
1336 through 1340	Required or Label or 4-Column Wide Field
1360 through 1374	Required or Label

ID	Placeholder
1500	Required or Legend
1801 through 1810	Required or Label
1816 through 1830	Required or Label
1860 through 1874	Required or Label
2001 through 2009	FormSection
2296 through 2300	Required or Label or 2-Column Wide Field
2301 through 2310	Required or Label
2316 through 2330	Required or Label
2331 through 2335	Required or Label or 2-Column Wide Field
2360 through 2374	Required or Label
2801 through 2810	Required or Label
2811 through 2815	Required or Label or 2-Column Wide Field
2816 through 2830	Required or Label
2860 through 2874	Required or Label

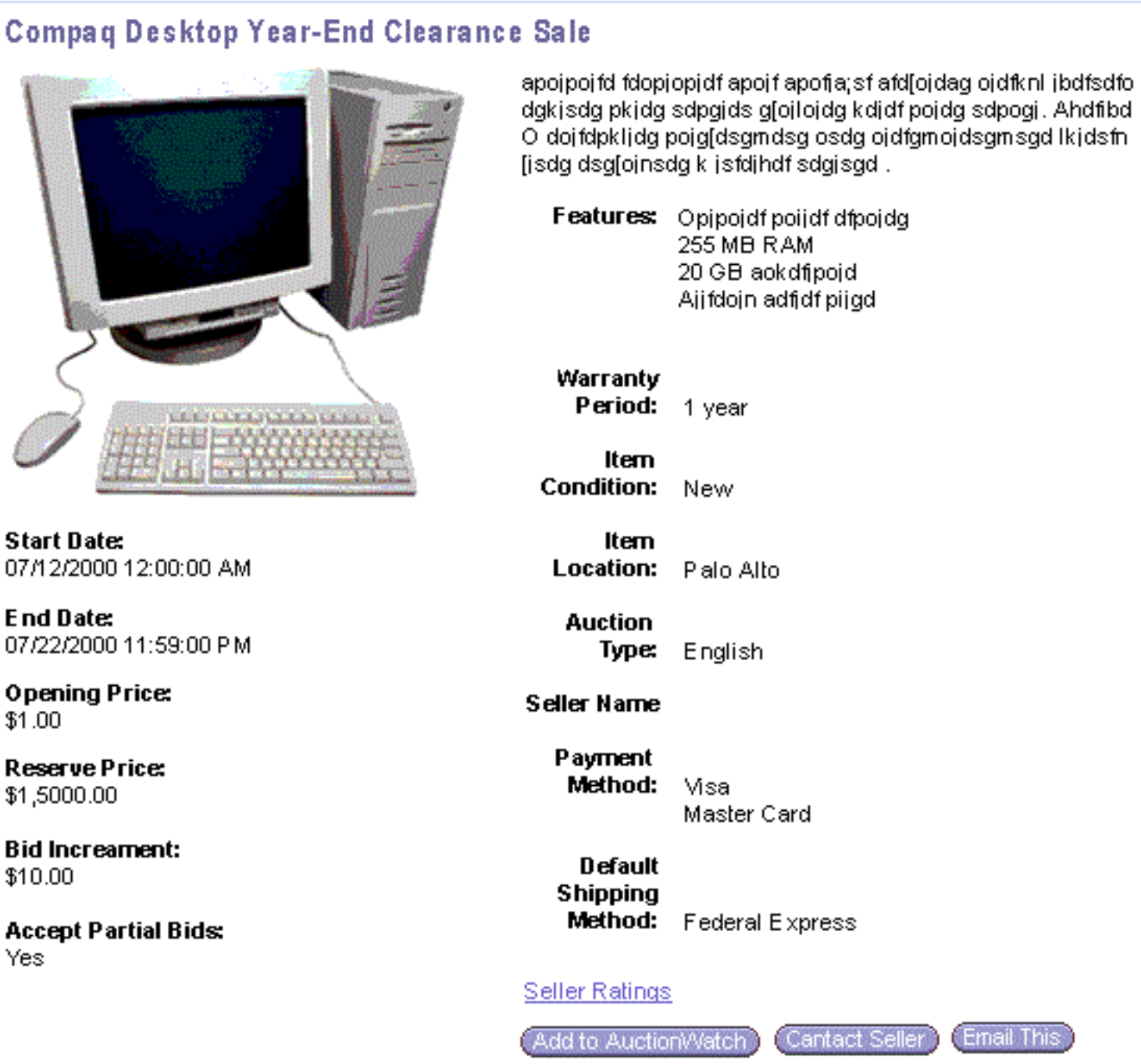
Item Detail Form Template

The DotCom Applet Form Item Detail template uses the DotComAppletFormItemDetail web template. It uses ID 1301 to map the product title and ID 1300 to map the product image.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletFormItemDetail
 CCApplet_Spacer
 dCCFormItemDetail
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
132 through 133	Control
141	Control
142	Control
157 through 158	Control
159	Control
160	Control
1102 through 1107	Label or Field
1112 through 1133	Label or Field
1300	Large Image (120X120)
1301	Item Name

Search, Top Form Template

The DotCom Applet Form Search Top template uses the DotComAppletSearchTop web template. It creates a drop-down list that the user can use to do a dot-com search.

This template uses the following structure:

```
DotComAppletSearchTop
 CCTitled
 CCFormSearch
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text
1101 through 1130	Label or Field
1500	Required or Legend

Title, Form Template

The DotCom Applet Form Title template uses the DotComAppletFormTitle web template. It displays a simple applet that includes a free-form title. It gets the title from the Title property of the applet.

The following image includes the generic layout that this template uses.

The following table includes an example of this template.

Shopping Cart

This template uses the following structure:

```
DotComAppletFormTitle
```

You cannot map items for this template.

Four Column, Merged, Form Template for Base, Edit, or New Mode

The Dotcom Form 4-Col Merged (Base/Edit/New) template uses the DotComAppletForm4ColMerged (Base/Edit/New) web template. It supports a specialized applet that does not include an applet tab. It can do the following:

- Display the applet title in the button bar. This configuration allows Siebel CRM to stack these applets without any intervening space. You can use it to create a summary view.
- Define a large number of control placeholders that span one column, two columns, or four columns.
- Map fields for up to four columns.
- Display labels at start of field values.
- Display validation errors at the start of the form.
- Use ID 91 to add text that spans all four columns.
- Use the predefined applet styles.

The following table includes the generic layout that this template uses.



This template uses the following structure:

```
DotCompplet Form4ColMerged (Base/Edit/New)
```

```
dCCFormButtonsTopWithTitle
dCCButtons_Form
CCRecordNav
CCTogglebar_drop
dCCForm4ColBody
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Inside Applet Help Text
91	Inside Applet Help Text
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 110	Control
121	First
122	Previous
123	Next
124	Last
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
157 through 158	Control

ID	Placeholder
1001 through 1009	FormSection
1020	FormSection
1296 through 1300	Required or Label or 2-Column Wide Field
1301 through 1310	Required or Label
1311 through 1315	Required or Label or 2-Column Wide Field
1316 through 1330	Required or Label
1331 through 1335	Required or Label or 2-Column Wide Field
1336 through 1340	Required or Label or 4-Column Wide Field
1360 through 1374	Required or Label
1801 through 1810	Required or Label
1816 through 1830	Required or Label
1860 through 1874	Required or Label
2001 through 2009	FormSection
2296 through 2300	Required or Label or 2-Column Wide Field
2301 through 2310	Required or Label
2316 through 2330	Required or Label
2331 through 2335	Required or Label or 2-Column Wide Field
2360 through 2374	Required or Label
2801 through 2810	Required or Label
2811 through 2815	Required or Label or 2-Column Wide Field
2816 through 2830	Required or Label

ID	Placeholder
2860 through 2874	Required or Label

Customer List Templates

This topic describes customer list templates. It includes the following topics:

- *Brief, Bullet, List Template*
- *Brief, Bullet, Border, List Template*
- *Brief, Bullet, Shade, List Template*
- *Brief, Image Bullet, List Template*
- *Brief, Image Bullet Two, List Template*
- *Brief, Image Bullet, Border, List Template*
- *Brief, Image Bullet, Shade, List Template*
- *Categorized List Template With Tabs*
- *Categorized List Template With No Tabs*
- *Categorized Bullet, List Template*
- *Categorized Bullet, List Template With Tabs*
- *Categorized Table of Contents, List Template*
- *Detailed, Image Bullet, List Template*
- *Detailed, Image Bullet, List Template With Record Navigation*
- *Detailed, Image Bullet, List Template With Record Navigation Two*
- *Go To View, List Template*
- *Horizontal List Template*
- *List Template With Tabs*
- *Light List Template*
- *Search Results, List Template*
- *Subcategory List Template*
- *Subcategory, One Per Row, List Template*
- *Subcategory, Four Per Column, List Template*
- *Subcategory, Six Per Column, List Template*
- *Subcategory, Indented, List Template*
- *Merged List Template for Base or Edit List Mode*
- *Links List Template*

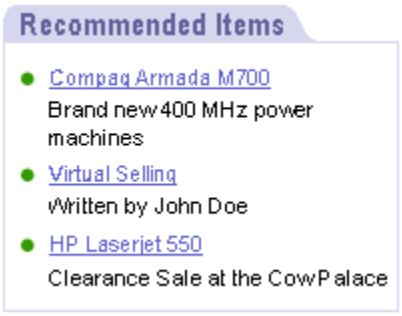
Brief, Bullet, List Template

The DotCom Applet List Brief Bullet template uses the DotComAppletListBriefBullet web template. It displays a bulleted list of records that include a record title and a brief description.

The following image includes the generic layout that this template uses.



The following table includes an example of this template.



This template uses the following structure:

```
DotComAppletListBriefBullet
 CCApplet_NamedSpacer dCCTitle_Portal CCLayoutButtons
 CCTogglebar_drop
 dCCListTitleNoRule
 dCCListBodyBullet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Title or DrillDown or New
90	Title
106	Find
107	Search
109 through 111	Control

ID	Placeholder
131	New
134	Reset
135	Cancel
136	Save
157	Label
184	DrillDown Title
203	MinimizeApplet
204	MaximizeApplet
207	MoveAppletUp
208	MoveAppletDown
211	ShowApplet
212	HideApplet
501	Field
502 through 511	Field
555	Label
1100	Outside Applet Help Text

Brief, Bullet, Border, List Template

The DotCom Applet List Brief Bullet/Border template uses the DotComAppletListBriefBulletBorder web template. It displays a bulleted list of records that include a record title and a brief description.

The following image includes the generic layout that this template uses.



The following table includes an example of this template.



This template uses the following structure:

```
DotComAppletListBriefBulletBorder
 CCApplet_Spacer
 dCCListTitleNoRule
 dCCListBodyBullet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
90	Title or DrillDown or New
106	Find
107	Search
109 through 111	Control
131	New
134	Reset
135	Cancel
136	Save
184	DrillDown Title

ID	Placeholder
501	Field
502 through 511	Field
1100	Outside Applet Help Text

Brief, Bullet, Shade, List Template

The DotCom Applet List Brief Bullet / Shade template uses the DotComAppletListBriefBulletShaded web template. It displays a bulleted list of records that include a record title and a brief description.

The following image includes the generic layout that this template uses.



The following table includes an example of this template. It uses the DotComAppletListBriefBulletShade web template.



This template uses the following structure:

```
DotComAppletListBriefBulletShaded
 CCApplet_Spacer
 CCTogglebar_drop
 dCCListTitleNoRule dCCListBodyBullet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Title or DrillDown or New

ID	Placeholder
90	Title
106	Find
107	Search
109 through 111	Control
131	New
134	Reset
135	Cancel
136	Save
184	DrillDown Title
501	Field
502 through 511	Field
1100	Outside Applet Help Text

Brief, Image Bullet, List Template

The DotCom Applet List Brief ImgBullet template uses the DotComAppletListBriefImgBullet web template. It displays a bulleted list of records that include a record title, image, and a brief description.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletListBriefImgBullet
 CCApplet_NamedSpacerd
 CCTitle_Portal
 CCLayoutButtons
 CCTogglebar_drop
 dCCListTitleNoRule
 dCCListBodyImgBullet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Anchor or Title
2	Title or DrillDown or New
90	Title
106	Find
107	Search
109 through 111	Control
131	New
134	Reset

ID	Placeholder
135	Cancel
136	Save
157	Label
184	DrillDown Title
203	MinimizeApplet
204	MaximizeApplet
207	MoveAppletUp
208	MoveAppletDown
211	ShowApplet
212	HideApplet
501	Small Image (30x30)
502	Title
503	Description
504 through 513	Other Text
520 through 529	Other
555	Label
1100	Outside Applet Help Text

Brief, Image Bullet Two, List Template

The DotCom Applet List Brief ImgBullet 2 template uses the DotComAppletListBriefImgBullet2 web template. It displays a bulleted list of records that include a record title, image, and a brief description.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListBriefImgBullet2
 CCApplet_NamedSpacer
 dCCTitle_Mapped
 CCLayoutButtons
 CCTogglebar_drop
 dCCListBodyImgBullet2
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Anchor or Title
2	Small Image (30x30)
90	Title or DrillDown Title or Label
157	Label
184	DrillDown Title
203	MinimizeApplet
204	MaximizeApplet
207	MoveAppletUp
208	MoveAppletDown
211	ShowApplet
212	HideApplet
501	Small Image (30x30)
502	Title
503	Description

ID	Placeholder
504 through 513	Other Text
520 through 529	Other
555	Label
1100	Outside Applet Help Text

Brief, Image Bullet, Border, List Template

The DotCom Applet List Brief ImgBullet / Border template uses the DotComAppletListBriefImgBulletBorder web template. It displays a bulleted list of records that include a record title, image, and a brief description.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletListBriefImgBulletBorder
 dCCListTitleNoRule
 dCCListBodyImgBullet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Anchor or Title

ID	Placeholder
90	Title or DrillDown or New
106	Find
107	Search
109 through 111	Control
131	New
134	Reset
135	Cancel
136	Save
184	DrillDown Title
501	Small Image (30x30)
502	Title
503	Description
504 through 513	Other Text
520 through 529	Other
1100	Outside Applet Help Text

Categorized List Template With Tabs

The DotCom Applet List Categorized Tabbed template uses the DotComAppletListCategorizedTab web template. It displays top level (highest level) bulleted items in a hierarchical list.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListCategorizedTab
 CCApplet_Spacer
 CCTitle
 dCCButtons_List
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
131	New
134	Reset
135	Cancel
136	Save
139 through 141	Control
501	Image
502	Field
1500	Required or Legend

Categorized List Template With No Tabs

The DotCom Applet List Categorized (No Tab) template uses the DotComAppletListCategorizedNoTab web template. It displays top level (highest level) items in a hierarchical list.

The following image includes the generic layout that this template uses.

This template uses the following structure:

```
DotComAppletListCategorizedNoTab
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
90	Title
501	Image
502	Field

Brief, Image Bullet, Shade, List Template

The DotCom Applet List Brief ImgBullet / Shade template uses the DotComAppletListBriefImgBulletShaded web template. It displays a bulleted list of records that include a record title, image, and a brief description.

The following image includes the generic layout that this template uses.



The following image includes an example of this template. The List Brief/Image Bullet/Shaded template uses the DotComAppletListBriefImgBulletShade web template.



This template uses the following structure:

```
DotComAppletListBriefImgBulletShaded
 dCCListTitleNoRule
 dCCListBodyImgBullet
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Anchor or Title
90	Title or DrillDown or New
106	Find
107	Search
109 through 111	Control
131	New
134	Reset
135	Cancel
136	Save
184	DrillDown Title
501	Small Image (30x30)
502	Title
503	Description

ID	Placeholder
504 through 513	Other Text
520 through 529	Other
1100	Outside Applet Help Text

Categorized Bullet, List Template

The DotCom Applet List Categorized Bullet template uses the DotComAppletListCategorizedBullet web template. It displays top level (highest level) bulleted items in a hierarchical list.

The following image includes the generic layout that this template uses.

The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletListCategorizedBullet
 dCCListCategorized
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
132	Field
502	Field

ID	Placeholder

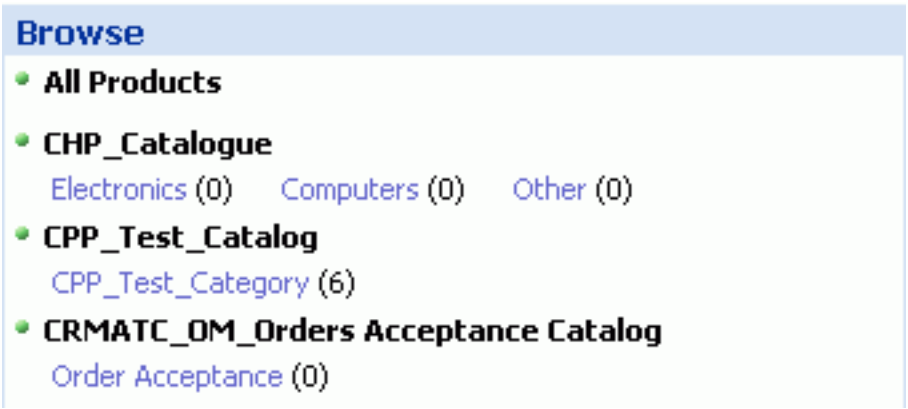
Categorized Bullet, List Template With Tabs

The DotCom Applet List Categorized Bullet / Tabbed template uses the DotComAppletListCategorizedBulletTab web template. It displays top level (highest level) bulleted items in a hierarchical list.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletListCategorizedBulletTab
 CCApplet_Spacer
 CCTitle
 dCCButtons_List
 dCCListCategorized
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)

ID	Placeholder
108	Cancel (Query)
109 through 111	Control
131	New
132	Field
134	Reset
135	Cancel
136	Save
139 through 141	Control
502	Field
1500	Required or Legend

Categorized Table of Contents, List Template

The DotCom Applet List Categorized TOC template uses the DotComAppletListCategorizedTOC web template. It can do the following:

- Display a table of contents from top level (highest level) categories.
- Use ID 90 to map the TOC title.
- Use ID 501 to map an image or bullet.
- Use ID 502 to map the item name.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListCategorizedTOC
 CCApplet_Spacer
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Anchor
90	TOC Title
501	Image
502	Field

Detailed, Image Bullet, List Template

The DotCom Applet List Detailed ImgBullet template uses the DotComAppletListDetailedImgBullet web template. It displays detailed product descriptions in a list. It displays a product image, title description, and buttons for each record.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletListDetailedImgBullet
 CCApplet_Spacer
 dCCTitle_Mapped
 CCLayoutButtons
 CCTogglebar_drop
 dCCListBodyImgBulletDetailed
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

Id	Placeholder
2	Small Image (30x30)
90	Title: DrillDown title or Label
142 through 143	Control

Id	Placeholder
145 through 146	Control
157	Control
158	Control
184	DrillDown Title
203	MinimizeApplet
204	MaximizeApplet
207	MoveAppletUp
208	MoveAppletDown
211	ShowApplet
212	HideApplet
501	Small Image (30x30)
502 through 503	Item Name
504 through 505	Label or Field
510 through 512	Label or Field
555	Label

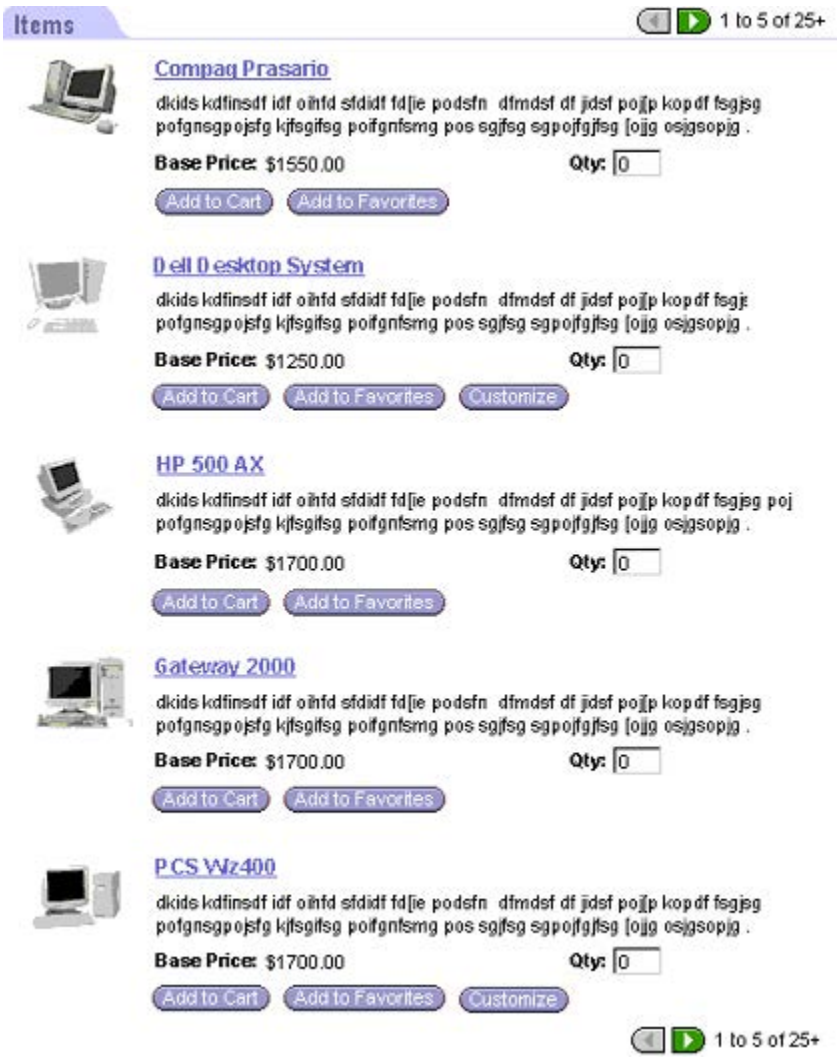
Detailed, Image Bullet, List Template With Record Navigation

The DotCom Applet List Detailed ImgBullet RecNav template uses the DotComAppletListDetailedImgBulletRecNav web template. It displays detailed product descriptions in a list. It displays a product image, title description, and buttons for each record.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletListDetailedImgBulletRecNav
 CCApplet_Spacer
 dCCTitle_RecNav
 CCRecordNav
 CCTogglebar_drop
 dCCListBodyImgBulletDetailed
```

`CCRecordNav`

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Small Image (30x30)
121	First
122	Previous
123	Next
124	Last
142 through 143	Control
145 through 146	Control
157 through 158	Control
501	Small Image (30x30)
502 through 503	Item Name
504 through 505	Label or Field
510 through 512	Label or Field
1100	Outside Applet Help Text

Detailed, Image Bullet, List Template With Record Navigation Two

The DotCom Applet List Detailed ImgBullet RecNav2 template uses the DotComAppletListDetailedImgBulletRecNav2 web template. It displays a detailed description for each product in a list. It includes a product image, title, and buttons for each record.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletListDetailedImgBulletRecNav2
 CCApplet_Spacer
 dCCTitle_RecNav
 CCRecordNav
 CCTogglebar_drop
 dCCListBodyImgBulletDetailed2
```

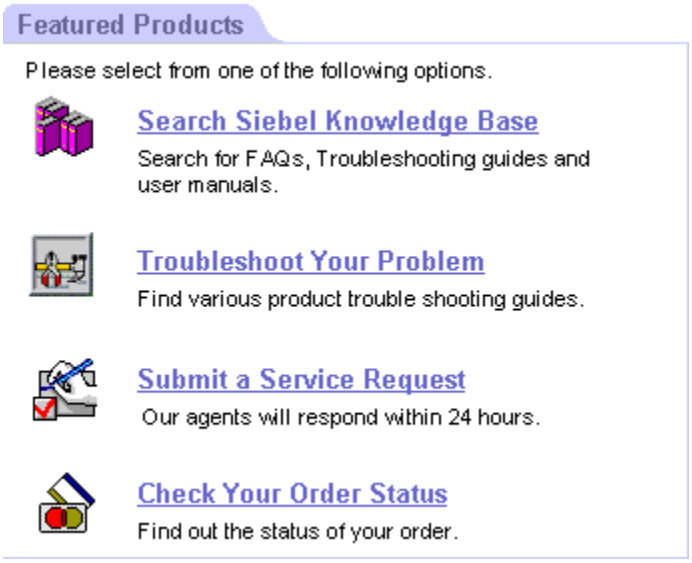
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Small Image (30x30)
121	First
122	Previous
123	Next

ID	Placeholder
124	Last
142 through 143	Control
145	Control
501	Small Image (30x30)
502 through 503	Item Name
504 through 505	Label or Field
506 through 508	Control
510 through 511	Label or Field
1100	Outside Applet Help Text

Go To View, List Template

The following image includes an example of this template.



Horizontal List Template

The DotCom Applet List Horizontal template uses the DotComAppletListHorizontal web template. It can do the following:

- Display a list of records horizontally.
- Create a layout that allows the user to compare items.
- Include a product image, title, and a brief description.
- Support record navigation.

The following image includes the generic layout that this template uses.



The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletListHorizontal
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCTogglebar_drop
 dCCListButtonsTop
 dCCButtons_List
 CCRecordNav
 CCTogglebar_drop
 CCListButtonsTopRight
 dCCListBodyHorizontal
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

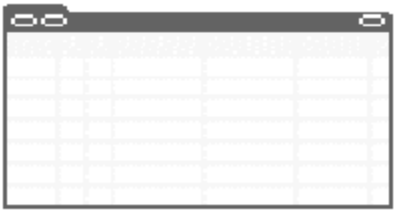
ID	Placeholder
2	Control
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
131	New
134	Reset
135	Cancel
136	Save
139 through 141	Control
142 through 143	Control
145	Control
150 through 151	Control
160 through 164	Control
161 through 164	Control
501	Small Image (30x30)
502	Item Name

ID	Placeholder
503 through 505	Field
510 through 512	Label or Field
1100	Outside Applet Help Text
1500	Required or Legend

List Template With Tabs

The DotCom Applet List Tabbed template uses the DotComAppletListTabbed web template. It can map up to twenty fields. For more information about how to configure this mapping, see *Configuring How Siebel CRM Uses the Columns Displayed Feature*.

The following image includes the generic layout that this template uses.



The following table includes an example of this template.

AuctionWatch

New | 1 to 3 of 3

Item #	Item Name	Qty	Winning Bid	Reserve Price Met	Type	Close Date/Time	Close Type
100001	Pentium III	190	$2000	Yes	English	05/15/00 1:30 PM	Auto
1283791	Compaq Laptop	20	$3,840	No	English	05/15/00 1:30 PM	Auto
782793	Accessories	6	$50	Yes	Dutch	05/16/00 1:30 PM	Manual

This template uses the following structure:

```
DotComAppletListTabbed
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitled
 CCListButtonsTop
 dCCButtons_List
 CCRecordNav
 CCTogglebar_drop
 CCListButtonsTopRight
dCCListHeaderdCCListBodyNoRowHilite
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Control
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
131	New
132 through 133	Control
134	Reset
135	Cancel
136	Save
139 through 141	Control
142 through 143	Control
144	Selected Row
145	Control
146	Save

ID	Placeholder
147	Pick Control
150 through 151	Control
160 through 164	Control
161 through 164	Control
501 through 520	Field
1100	Outside Applet Help Text
1500	Required or Legend

Light List Template

The DotCom Applet List Light template uses the DotComAppletListLight web template. It can do the following:

- Display a specialized list that includes a totals row at the end of the list. You must use Siebel Tools to configure a column that creates a total.
- Include a double line at start of the totals row.
- Use ID 199 to map a totals row label.
- Use one label for all row totals. This label must be generic so that it describes all rows.

The following table includes the generic layout that this template uses.



The following table includes an example of this template.


Line Items

Update Total | Check Out | 1 to 5 of 25+

Item	List Price	Comments	Your Price	Qty	Total
Pentium II Desktop	$1,850.00	10% Discount	$1,665.00	1	$1,665.00
15" Monitor					
Mouse					
Software Pack					
P-133 Quad Server	$36,595.95	10% Discount		1	$32,936.35
P-133 Mega Server	$12,995.95	10% Discount	$9,097.17	1	$9,097.17
Mouse	$49.95	10% Discount	$44.96	100	$4,496.00
Windows NT	$99.95	10% Discount	$89.96	15	$1,349.40
Totals:	$51591.80				$49543.92

This template uses the following structure:

```
DotComAppletListLight
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 CCTogglebar_drop
 dCCListButtonsTop
 dCCButtons_List
 CCRecordNav
 CCTogglebar_drop
 CCListButtonsTopRight
 dCCListHeaderTotals
 dCCListBodyTotalsNoRowHilite
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

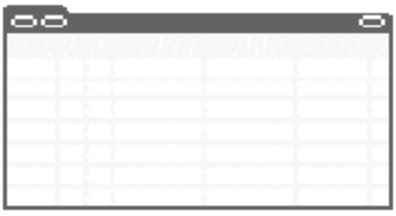
ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last

ID	Placeholder
125	Info-Button
126	Query Assistant
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
144	Selected Row
145	Control
146	Save
147	Pick Control
150 through 151	Control
160 through 164	Control
199	Totals Label
501 through 520	Control
1100	Outside Applet Help Text
1500	Required or Legend

Search Results, List Template

The DotCom Applet List Search Results template uses the DotComAppletListSearchResults web template. It displays search results in a list. This list does not support record selection. It does not highlight a record selection.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListSearchResults
 CCApplet_NamedSpacer
 CCTitle_Named
 CCTitle
 dCCListButtonsTop
 dCCButtons_List
 CCRecordNav
 CCTogglebar_drop
 CCListButtonsTopRight
 dCCListHeader
 dCCListBodySearchResults
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

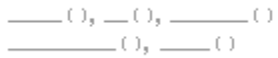
ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next

ID	Placeholder
124	Last
125	Info-Button
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
144	Select
145 through 146	Control
147	Pick
150 through 151	Control
160 through 164	Control
501 through 520	Control
1100	Outside Applet Help Text
1500	Required or Legend

Subcategory List Template

The DotCom Applet List Subcategory template uses the DotComAppletListSubCategory web template. It displays subcategory links where a comma separates each link.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListSubCategory
```

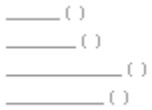
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
502	Field
503	Field

Subcategory, One Per Row, List Template

The DotCom Applet List Subcategory 1 Per Row template uses the DotComAppletListSubCategory_1PerRow web template. It displays one subcategory link in each row.

The following inage includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListSubCategory_1PerRow
```

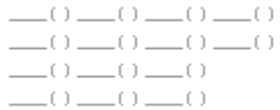
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
501	Image or Subcategory or Count
502	Subcategory
503	Count

Subcategory, Four Per Column, List Template

The DotCom Applet List Subcategory 4-Per-Column template uses the DotComAppletListSubCategory_4PerColumn web template. It displays four subcategory links in each column.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListSubCategory_4PerColumn
```

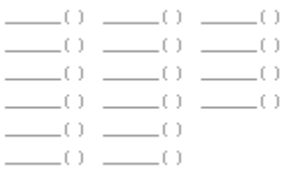
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
501	Image: Subcategory or Count
502	Subcategory
503	Count

Subcategory, Six Per Column, List Template

The DotCom Applet List Subcategory 6-Per-Column template uses the DotComAppletListSubCategory_6PerColumn web template. It displays six subcategory links in each column.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListSubCategory_6PerColumn
```

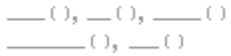
The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
501	Image: Subcategory or Count
502	Subcategory
503	Count

Subcategory, Indented, List Template

The DotCom Applet List Subcategory Indented template uses the DotComAppletListSubCategoryIndented web template. It displays subcategory links where a comma separates each link. It indents links to indicate the hierarchical nature of the data.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListSubCategoryIndented
 CCApplet_NamedSpacer
 dCCListTitleNoRule
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

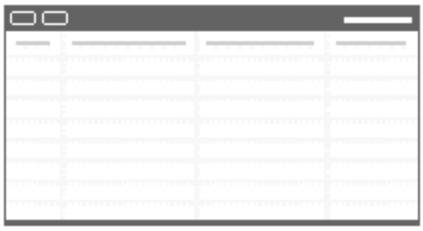
ID	Placeholder
90	Title or DrillDown Title or New
106	Find
107	Search
109 through 111	Control
131	New
134	Reset
135	Cancel
136	Save

ID	Placeholder
184	DrillDown Title
502	Field
503	Field
1100	Outside Applet Help Text

Merged List Template for Base or Edit List Mode

The DotCom List Merged (Base/EditList) template uses the DotComAppletListMerged (Base/EditList) web template. It is a specialized applet template that can stack applets one on top of the other without intervening space. You can use it on a report or summary page. It displays the applet title in the upper far corner.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComAppletListMerged (Base/EditList)
 dCCListButtonsTopWithTitle
 dCCButtons_List
 CCRecordNav
 CCTogglebar_drop
 dCCListHeader
 dCCListBodyNoRowHilite
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)

ID	Placeholder
108	Cancel (Query)
109 through 111	Control
121	First
122	Previous
123	Next
124	Last
125	Info-Button
131	New
132 through 133	Control
134	Reset
135	Cancel
136	Save
139 through 143	Control
144	Selected Row
145	Control
146	Save
147	Pick Control
501 through 520	List Header

Links List Template

The DotCom Applet Links template uses the DotComAppletLinks web template. It displays a list of links that include an image and a description. You can use it to create a small table of contents.

The following image includes the generic layout that this template uses.

This template uses the following structure:

```
CCApplet_Spacer
 DotComAppletLinks
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1097	Title
1098	Intro Text
1099	Thematic Image
1100	Text
1101 through 1130	Image or Link (Required) or Description or Text

Customer View Templates

This topic describes customer view templates. It includes the following topics:

- *Admin View Template*
- *Basic View Template*
- *Detail View Template*
- *Detail View Two Template*
- *Detail, Multiple Child, View Template*
- *25 50 25, View Template*

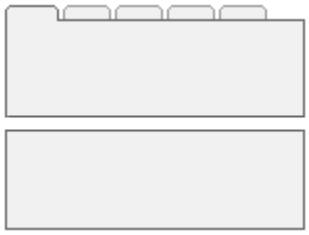
- *25 50 25, Home, View Template*
- *50 50, View Template*
- *66 33, View Template*
- *100 66 33 100, View Template*

Each shaded area in the view diagrams in this topic represents an area where you can place one or more applets. Siebel CRM expands each applet horizontally to fit the column where you assign this applet. The amount of data that it displays determines the amount of vertical space the applet uses.

Admin View Template

The DotCom View Admin template uses the DotComViewAdmin1 web template. It displays each subview as a tab across the start of the view. You can use it to configure an administrative view that must display nonrelated views that are difficult to categorize.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComViewAdmin1
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCSubViewbar_Tabs
 CCApplet_Spacer
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

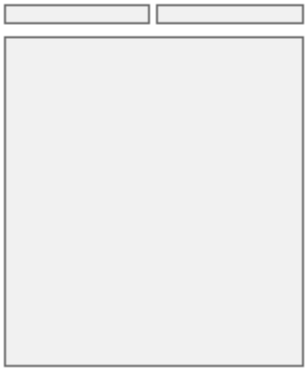
ID	Placeholder
5	Child Applet With Pointer
6	Child Applet
7 through 9	Grandchild Applet
10 through 12	Grandchild Applet
13 through 15	Grandchild Applet
201	Mini-Applet

ID	Placeholder

Basic View Template

The DotCom View Basic template uses the DotComView (Basic) web template. It displays applets that use the full window width. It stacks these applets on top of each other.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComView (Basic)
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

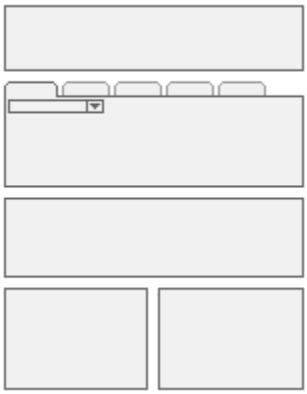
ID	Placeholder
101	Salutation Applet
102 through 111	Applet

Detail View Template

The DotCom View Detail template uses the DotComViewDetailPUBeCalendarMonthlyView web template. It can do the following:

- Display a parent applet.
- Display noncontext views as tabs.
- Display categorized subviews in a drop-down list.
- Display a child applet.
- Display multiple grandchild applets.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComViewDetailPUBeCalendarMonthlyView
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCViewbar_Tabs
 CCApplet_Spacer
 dCCSubViewbar_Drop
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

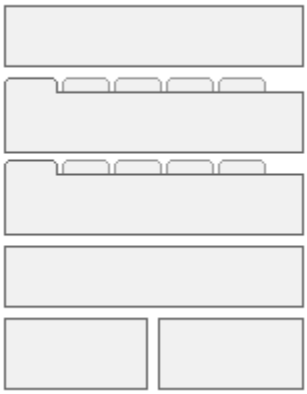
ID	Placeholder
1	Parent Applet
2	Child Applet
3 through 5	Grandchild Applet
6 through 7	Grandchild Applet

ID	Placeholder
8 through 9	Grandchild Applet
201	Mini-Applet

Detail View Two Template

The DotCom View Detail2 template uses the DotComViewDetail2 web template. It displays the same items that the DotCom View Detail displays. For more information, see *Detail View Template*.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComViewDetail2
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCViewbar_Tabs
 CCApplet_Spacer
 dCCSubViewbar_Tabs
 CCApplet_Spacer
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

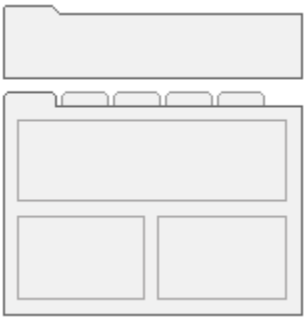
ID	Placeholder
1	Parent Applet
2	Child Applet

ID	Placeholder
3	Child Applet
4	Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet
201	Mini-Applet

Detail, Multiple Child, View Template

The DotCom View Detail MultiChild template uses the DotComViewDetailMultiChild web template. It displays the same items that the DotCom View Detail displays. For more information, see *Detail View Template*.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComViewDetailMultiChild
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCViewbar_Tabs
 CCApplet_Spacer
 dCCSubViewbar_Drop
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
1	Parent Applet
2	Child

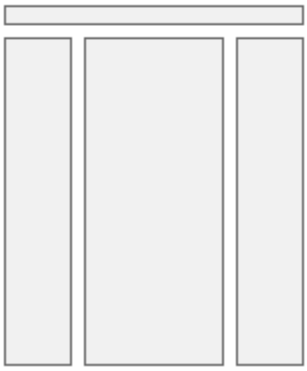
ID	Placeholder
3 through 5	Child or Grandchild Applet
6 through 7	Grandchild Applet
8 through 9	Grandchild Applet
201	Mini-Applet

25 50 25, View Template

The DotCom View 25 50 25 template uses the DotComView25 50 25 web template. It includes the following columns:

- The first column uses 25 percent of the window width.
- The second column uses 50 percent of the window width.
- The third column uses 25 percent of the window width.
- The top (highest) region uses the full window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComView 25 50 25
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

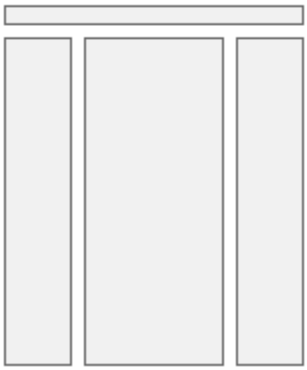
ID	Placeholder
101	Salutation Applet
102 through 111	Applet
202 through 211	Applet
302 through 311	Applet

25 50 25, Home, View Template

The DotCom View 25 50 25 Home template uses the DotComView 25 50 25 Home web template. It includes the following columns:

- The first column uses 25 percent of the window width.
- The second column uses 50 percent of the window width.
- The third column uses 25 percent of the window width.
- The top (highest) region uses the full window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComView 25 50 25 Home
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

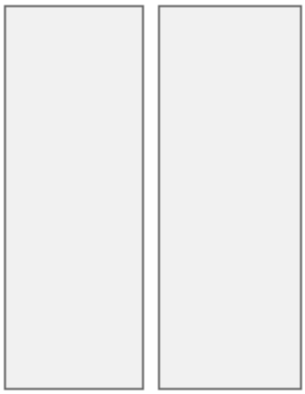
ID	Placeholder
102 through 111	Applet
202 through 211	Applet
302 through 311	Applet

50 50, View Template

The DotCom View 50 50 template uses the DotComView 50 50 web template. It includes the following columns:

- The first column uses 50 percent of the window width.
- The second column uses 50 percent of the window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComView 50 50
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
101	Salutation Applet
102 through 111	Applet

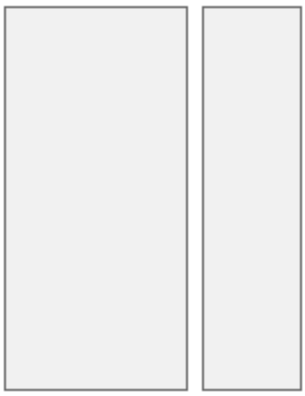
ID	Placeholder
202 through 211	Applet
302 through 311	Applet

66 33, View Template

The DotCom View 66 33 template uses the DotComView 66 33HomePage web template. It includes the following columns:

- The first column uses 66 percent of the window width.
- The second column uses 33 percent of the window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComView 66 33HomePage
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
101	Salutation Applet or Layout Controls
102 through 111	Applet
202 through 211	Applet

ID	Placeholder
302	Applet

100 66 33 100, View Template

The DotCom View 100 66 33 100 template uses the DotComView 100 66 33 100 web template. It includes the following columns:

- The first column uses 66 percent of the window width.
- The second column uses 33 percent of the window width.
- Applets in the starting or ending regions use the full window width.

The following image includes the generic layout that this template uses.



This template uses the following structure:

```
DotComView 100 66 33 100
 dCCHTMLHeader
 CCStylesChoice
 CCThreadbar
 dCCHTMLFooter
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
101	Salutation Applet
102 through 106	Applet
201	Mini-Applet

ID	Placeholder
202 through 206	Applet
302 through 306	Applet
402 through 406	Applet
502 through 506	Applet
602 through 606	Applet

Customer Container Templates

This topic describes customer container templates. It includes the following topics:

- *Container Template With Frames*
- *Container Template Without Frames*
- *Container Template for Employee and Customer Applications*

Siebel CRM comes predefined with HTML frames enabled and with a set of nonframed templates that you can use in a customer application.

A Siebel employee application requires frames. You can remove frames only in a customer application. You use the page container to remove these frames. For information about configuring a customer application that does not use frames, see *Siebel eSales Administration Guide* .

Container Template With Frames

The DotCom Page Container (Framed) template uses the DotComPageContainer web template. It defines the framed container page for a customer application. It defines the banner, screen bar, view bar, and content frames.

This template uses the following structure:

```
DotComPageContainer
 CCStylesChoice
 dCCFrameBanner_Hybrid
 CCStylesChoice
 dCCFrameBanner
 dCCFrameViewbar
 CCStylesChoice
 dCCFrameScreenbar_Hybrid
 CCStylesChoice
 dCCScreenbar_Tabs_Hybrid
 dCCScreenbar_Tabs
 CCFrameContent_Logic
 CCFrameContent_VSD
 CCFrameContent_VST
 CCFrameContent_VS
 CCFrameContent_VDT
```

```
CCFrameContent_VD
CCFrameContent_VT
CCFrameContent_V
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
11 through 19	Page Item
50 through 55	Page Item

Container Template Without Frames

The DotCom Page Container No Frames template uses the DotComPageContainer NoFrames web template. It defines the nonframed page container.

This template uses the following structure:

```
DotComPageContainer NoFrames
 CCStylesChoice
 CCThreadbar
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
11 through 19	Page Item

Container Template for Employee and Customer Applications

The DotCom Page Container (Hybrid) template uses the DotComPageContainer (Hybrid) web template. It defines a hybrid frame container. This hybrid can include the functionality that Siebel CRM includes in a customer application and in an employee application. The banner uses the customer application style that does not include application menus. The view bar uses the employee application style that supports the Search Center and the History bar.

This template uses the following structure:

```
DotComPageContainer (Hybrid)
 CCStylesChoice
 dCCFrameBanner_Hybrid
 CCStylesChoice
 dCCFrameBanner
 CCFrameViewbar
 CCStylesChoice
 dCCFrameScreenbar_Hybrid
```

```
CCStylesChoice
dCCScreenbar_Tabs_Hybrid
dCCScreenbar_Tabs
CCFrameContent_Logic
CCFrameContent_VSD
CCFrameContent_VST
CCFrameContent_VS
CCFrameContent_VDT
CCFrameContent_VD
CCFrameContent_VT
CCFrameContent_V
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
11 through 19	Page Item
21 through 22	Page Item
23	History Label
33 through 34	Control
35	Favorites Label
36 through 38	Control
50 through 55	Page Item

Specialized Customer Templates

This topic describes specialized customer templates. It includes the following topics:

- *Find Template*
- *License, Base, One Column Template*
- *Parametric Search, Head Template*
- *Parametric Search, Tail Template*
- *Real-Time Shopping Cart Template*
- *Advanced Search Template*
- *Advanced Search Template With Tabs*
- *Basic Search Template*
- *Totals Template*

Find Template

The DotCom Applet Find template uses the DotComAppletFindApplet web template. It displays the fields that the user can use in a search.

This template uses the following structure:

```
DotComAppletFindApplet
 dCCFormSearch
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text
132	Menu
133	New
141 through 142	Control
143	Control
1101 through 1130	Label or Field

License, Base, One Column Template

The DotCom Applet License Base 1 Column template uses the DotComAppletLicenseBase1Column web template. It uses ID 2 to map the applet toggle control.

This template uses the following structure:

```
DotComAppletLicenseBase1Column
 CCApplet_NamedSpacer
 dCCTitle_Named
 dCCTitle
 CCTogglebar_drop
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text

ID	Placeholder
132 through 133	Control
141 through 142	Control
157 through 158	Control
1200 through 1201	Label
1400 through 1401	Label

Parametric Search, Head Template

The DotCom Applet Parametric Search Head template uses the DotComAppletParametricSearchHead web template. It displays the fields that the user can use to do a parametric search. A parametric search is a type of search that includes multiple criteria. For example, finding an opportunity within one of three territories, with a revenue of more than $35000, and with a lead quality of Very High.

This template uses the following structure:

```
DotComAppletParametricSearchHead
 CCApplet_Spacer
 CCTitle
 dCCListButtonsTop
 dCCButtons_List
 CCRecordNav
 CCTogglebar_drop
 CCListButtonsTopRight
 CCListBodyInverted
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Control
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 111	Control
121	First

ID	Placeholder
122	Previous
123	Next
124	Last
131	New
134	Reset
135	Cancel
136	Save
139 through 141	Control
142 through 143	Control
144	Selected Row
145	Control
146	Control
147	Pick Control
150 through 151	Control
160 through 164	Control
161 through 164	Control
499	Record Title Row
501 through 520	Control
1100	Outside Applet Help Text
1500	Required or Legend

Parametric Search, Tail Template

The DotCom Applet Parametric Search Tail template uses the DotComAppletParametricSearchTail web template. It displays the result list of a parametric search.

This template uses the following structure:

```
DotComAppletParametricSearchTail
 CCListBodyNoRowHilite
 CCBottomApplet
```

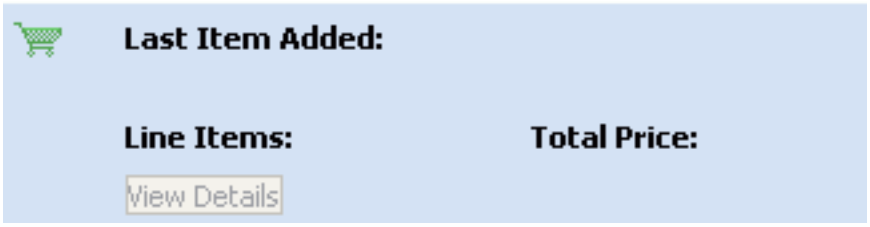
The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
142 through 143	Control
144	Selected Row
145	Control
146	Save
147	Pick Control
501 through 540	Field

Real-Time Shopping Cart Template

The DotCom Applet Realtime Cart template uses the DotComAppletRealtimeCart web template. It displays the real-time shopping cart applet.

The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletRealtimeCart
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
132 through 133	Control
133	Control
140	Icon or Mapped Title or Item Name or Quantity or Line Items Label or Line Items Field: Total Price Label or Total Price Field
141	Control
500	Mapped Title
501	Item Name
502	Quantity
1222	Line Items Label
1223	Total Price Label
1322	Line Items Field
1323	Total Price Field
2222	Label
2223	Label
2322	Field
2323	Field

Advanced Search Template

The DotCom Applet Search Advanced template uses the DotComAppletSearchAdvanced web template. It displays the fields that the user can use to do an advanced search.

This template uses the following structure:

```
DotComAppletSearchAdvanced
 dCCFormSearch
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text
132	Menu
133	New
141 through 142	Control
143	Control
1101 through 1130	Label or Field
1199	Label

Advanced Search Template With Tabs

The DotCom Applet Search Advanced Tabbed template uses the DotComAppletSearchAdvancedTabbed web template. It displays the fields that the user can use to do an advanced search. It includes tabs.

This template uses the following structure:

```
DotComAppletSearchAdvancedTabbed
 CCTitle
 dCCFormSearch
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text
132	Menu
133	New
141 through 142	Control

ID	Placeholder
143	Control
1101 through 1130	Label or Field
1199	Label
1500	Required or Legend

Basic Search Template

The DotCom Applet Search Basic template uses the dCCAppletSearchBasic web template. It displays the fields that the user can use to do a basic search.

This template uses the following structure:

```
dCCAppletSearchBasic
 dCCFormSearch
```

The following information lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
91	Inside Applet Help Text
132	Menu
133	New
141 through 142	Control
143	Control
1101 through 1130	Label or Field

Totals Template

The DotCom Applet Totals template uses the DotComAppletTotals web template. It is a specialized form template that creates multiline form totals, and then displays these totals beneath a quote or order.

The following image includes an example of this template.



This template uses the following structure:

```
DotComAppletTotals
 dCCFormTotals
 dCCButtons_Form
```

The following table lists the items that Siebel CRM can map for this template. For more information, see *About Mapping IDs to Placeholders*.

ID	Placeholder
2	Back
106	Query
107	Go (ExecuteQuery)
108	Cancel (Query)
109 through 110	Control
131	New
132	Edit
133	Delete
134	Reset
135	Cancel
136	Save
139 through 143	Control
157 through 158	Control
1112 through 1117	Field or Label

10 Cascading Style Sheets

Cascading Style Sheets

This chapter describes cascading style sheets. It includes the following topics:

- *Overview of Cascading Style Sheets*
- *Elements of Cascading Style Sheets*

Overview of Cascading Style Sheets

This chapter describes the class names of the cascading style sheets that Siebel CRM uses and the interface elements that they control. You can find the settings for these cascading style sheet settings in the following files:

- main.css for employee applications
- dCCmain.css for customer applications

The class names that these style sheets reference typically include level 1 attributes of the style sheet. You typically modify the following items:

- Font characteristics
- Link characteristics
- Background colors

Siebel CRM includes cascading style sheets in the following directory of a Siebel installation:

```
PUBLIC\lang\FILES
```

where:

- lang is the language code, such as enu.

You can use an HTML editor to modify a cascading style sheet.

For more information about cascading style sheets, see *Configuring Siebel Business Applications* .

Elements of Cascading Style Sheets

This topic describes elements of cascading style sheets. It includes the following topics:

- *Applet Elements*
- *Banner Elements*
- *Calendar Elements*

- *Control Elements*
- *Customer Application Elements*
- *Dashboard Elements*
- *Dialog Box Elements*
- *Divider Elements*
- *ePortal Elements*
- *External News Elements*
- *Fonts and Link Color Elements*
- *Form Elements*
- *Login Page Elements*
- *Navigation Elements*
- *Page Header Elements*
- *Rich Text Component Elements*
- *Search Center Elements*
- *Smart Script Player Elements*
- *Status Message Elements*
- *Text Elements*

Applet Elements

This topic describes applet elements.

Applet Layout Style Elements

The following table describes the elements that define applet layout styles.

Element	Description
You can use one of the following elements: • LayoutButtonOn • LayoutButtonOff	Defines the background color of layout buttons. You can use these elements with a transparent GIF file to create two button states.
You can use one of the following elements: • LayoutView • LayoutStyleHide • LayoutStyleMax • LayoutStyleMin	Defines the color and font characteristics of an applet that Siebel CRM displays in layout mode.

Applet Highlight Elements

The following table describes the elements that define how Siebel CRM highlights an applet that the user chooses.

Element	Description
Selected TD.AppletHIFormBorder	Defines the border color of a form applet that Siebel CRM sets if the user chooses this applet. If a tag uses the Selected class, and if this tag encloses an applet, then Siebel CRM highlights the applet border.
Selected TD.AppletHIListBorder	Defines the border color of a list applet that Siebel CRM sets if the user chooses this applet. If a tag uses the Selected class, and if this tag encloses an applet, then Siebel CRM highlights the applet border.

Applet Style Elements

The following table describes the elements that define applet styles.

Element	Description
AppletBlank	Defines the background color of the empty space that Siebel CRM displays in the applet. Siebel CRM uses it to make sure that the area after the applet tab displays plain and not the background color of the form or list.
AppletBorder	Defines the applet border. This border is the rectangle that surrounds the form or list, not including tabs or button bars.
AppletButtons	Defines the font and color of elements that Siebel CRM displays on the button bar.
You can use the following elements: • AppletHIFormBorder • AppletHIListBorder	Defines the applet highlight color that Siebel CRM displays if the user chooses this applet. For more information, see *Applet Highlight Elements*.
AppletStyle#	Defines a number of one through eight. The AppletStyle# element is the root class for an applet. If you configure Siebel CRM to switch this root applet style, then it uses the substyles that are associated with this root style.
AppletBack	Defines the background color of the form or list.
AppletTitle	Defines the background color, text, and link characteristics of the applet title. Siebel CRM typically displays this title in a tab at the start of the applet.

List Applet Elements

The following table describes the elements that define a list applet.

Element	Description
Header	Defines the font and alignment of field column headers.

Element	Description
You can use the following elements: • Header • listRowEven • listRowOdd	Defines the background color of even or odd rows. Siebel CRM does not use this element in a release template.
ListBorder	Creates a border around a list. Siebel CRM uses this border to highlight this applet.
listRowError	Defines the background color of a row that creates an error. Siebel CRM does not use this element in a release template.
listRowOff	Defines the background color of a dechosen row.
You can use the following elements: • Row • RowCenter • RowRight	Defines the background color, text color, and alignment of field values that Siebel CRM displays in a list row.

Tree Applet Elements

The following table describes the elements that define the styles of a tree applet.

Element	Description
treeActive	Defines the link characteristics for the chosen tree node.
treeBack	Defines the background and border characteristics for a tree applet.
treeInactive	Defines the link characteristics for a nonchosen tree node.

Banner Elements

The following table describes the elements that define the banner. Siebel CRM displays it in the topmost element in the client. It contains global navigation elements and the Oracle logo.

Element	Description
banner	Defines characteristics of the text, line, and background of the banner area.
You can use the following elements:	Defines the color of the bevel that Siebel CRM displays at start of and after the banner elements.

Element	Description
• bannerDiv • bannerDiv2 • bannerDiv3	

Calendar Elements

This topic describes calendar elements.

Calendar Elements

The following table describes the elements that define calendar applets.

Element	Description
calendarActivity	Defines the characteristics for a single day activity that Siebel CRM displays in the Daily, Weekly, or Monthly calendar.
calendarActivityBack	Defines the characteristics for the border that surrounds a range of activities in the Daily or Weekly calendar.
calendarBorder	Defines the external border for the Calendar applet.
calendarBorder2	Defines the border for the Home Page Calendar applet that includes a different usability.
calendarDay	Defines the external characteristics for the header of a day in the Monthly calendar. This header is one level preceding the CalendarDayBar element and the CalendarDayBarDark element.
calendarDayBar	Defines the characteristics for the header of a day in the Monthly calendar. Siebel CRM uses this element if the day is not the current view day for the Monthly calendar.
calendarDayBarDark	Defines the characteristics for the header of a day in the Monthly calendar. If the day is the current view day for the Monthly calendar, then Siebel CRM uses this element to highlight this day.
calendarInterval	Defines the characteristics for an interval for the following: • An hour in the Daily calendar. • A day in the Weekly calendar. • A week in the Monthly calendar.
calendarMultiDayActivity	Defines the characteristics for a multiday activity that Siebel CRM displays in the Daily, Weekly, or Monthly calendar.

Service Calendar Elements

The following table describes the elements that define the Service Calendar applet.

Element	Description
calendarServiceActivityOff	Defines an interval that does not contain an activity. It is an empty cell.
calendarServiceActivityOn	Defines an interval that contains an activity.
calendarServiceBorder	Defines a new row in the Service Calendar.
ServiceCalRow	Defines the external border for the Service Calendar.

Control Elements

The following file defines graphical user interface (GUI) controls:

```
<SIEBEL_ROOT>\PUBLIC\lang\files\jctrls.css
```

It includes the following controls:

- clsJGCTextBox2D
- clsJGCTextBox3D
- clsJGCComboBox2D
- clsJGCComboBox3D
- clsJGCPickList2D
- clsJGCPickList3D
- clsJGCTextArea2D
- clsJGCTextArea3D
- clsJGCHyperList2D
- clsJGCHyperList3D
- clsJGCCheckBox2D
- clsJGCCheckBox3D
- clsJGCButton2D
- clsJGCButton3D
- clsJGCDropArrow2D
- clsJGCDropArrow3D
- clsJGCJTime
- clsJGCJTimeReadOnly
- clsJGCJTimeDisabled

- clsJGCJDateFont
- clsJGCMain
- clsJLCMain
- clsScreenBar
- clsVisibilityPicker
- clsDetailCategory
- clsSubDetailView
- clsAlphaTab

If you must modify the background color of a subview link, then you can add the following item to the clsDetailCategory control:

```
NC-LINK-FRAME-BACKGROUND-COLOR
```

Customer Application Elements

The following table describes the elements that define customer application elements.

Element	Description
dCCAppletBorder1	Defines the border characteristics that Siebel CRM displays in a customer applet.
dCCAppletRule1	Defines the size and color that Siebel CRM displays in a customer applet.
dCCAppletShade1	Defines the background characteristics of a customer applet that uses a shaded background.
dCCAppletTitle	Defines the text, line, and background characteristics of the applet title that Siebel CRM displays in a customer applet.
You can use the following elements: • dCCItemLabel • dCCItemLabelLeft	Defines the text characteristics of product labels that Siebel CRM displays in a form or list. If the user reads the language that Siebel CRM displays from right-to-left, then it reverses the alignments that these classes define.
dCCItemTitle	Defines the text characteristics of a product title.
dCCItemValue	Defines the text characteristics of each product field value.
dCCItemValue150	Defines the text characteristics of each product field value. It sets the field width to 150 pixels.

Dashboard Elements

The following table describes the elements that define the Dashboard.

Element	Description
dashbrdBack	Defines the background color of the dashboard.
dashbrdBorder	Defines the border color and size of the dashboard.

Dialog Box Elements

The following table describes the elements that define a dialog box.

Element	Description
You can define the following elements: • mvgBack • mvgBorder	Defines the background color and border of forms and lists that Siebel CRM displays in a dialog box.

Divider Elements

The following table describes the elements that define the divider.

Element	Description
divider	Defines the border for the divider that Siebel CRM displays between elements on the view bar frame.

ePortal Elements

This topic describes ePortal elements.

Add Info Section Elements

The following table describes the elements that define the Add Info section.

Element	Description
AddInfoBullet	Defines the style for the bullet in the Additional information section of the Account/Company Briefing object.
AddInfoDescr	Defines the style of the description text for each link in the Additional Info section of the Account/ Company Briefing object.
AddInfoHeader	Defines the style for each section heading in the Additional Info section of the Account/Company Briefing object.
AddInfoWebSite	Defines the style for each link in the Additional Info section of the Account/Company Briefing object.

Company Header Elements

The following table describes the elements that define the company header.

Element	Description
CompanyLink	Defines the style for the URL of the company home page that Siebel CRM displays in a company briefing.
CompanyName	Defines the style for the company name that Siebel CRM displays in a company briefing.

Company Search Elements

The following table describes the elements that define the company search.

Element	Description
CnsHead	Defines the style for the header in the CompanySearch results screen.
CnsLink	Defines the style for the Acct Topic Management link in the D-U-N-S assignment (ATM) screen.
CnsRow	Defines the style for each result line in the CompanySearch results screen.

Profile Data Elements

The following table describes the elements that define profile data.

Element	Description
ProfCopyright	Defines the style that Siebel CRM uses for copyright text in the DNB (Dunn & Bradstreet) profile in the Account/Company Briefing object.

Element	Description
ProfData	Defines the style for each data element in the DNB profile.
ProfLabel	Defines the style for each label in the DNB profile.
ProfSection	Defines the style for each section header in the DNB profile.

Search Page Elements

The following table describes the elements that define the Search Page.

Element	Description
ExSearchField	Defines the font and width of fields that Siebel CRM displays in search pages, such as Web search, map search, and yellow pages.
ExSearchLabel	Defines the style for each row in the Web search, map search, and yellow pages.
ExSearchTable	Defines the style for table in the Web search, map search, and yellow pages.

Subsidiary Elements

The following table describes the elements that define a subsidiary.

Element	Description
SubsidCompanyName	Defines the style for the parent company in the Corporate Relations section of the Account/Company Briefing object.
SubsidCompleteList	Defines the style for the link that displays the entire Corporate-Relations section of the Account/Company Briefing object.
SubsidCopyright	Defines the copyright text in the Corporate-Relations section of the Account/Company Briefing object.
SubsidDisclaimer	Defines the disclaimer text in the Corporate-Relations section of the Account/Company Briefing object.
SubsidSubsidName	Defines the style for the child company in the Corporate-Relations section of the Account/Company Briefing object.

External News Elements

The following table describes the elements that define external controls that include news content.

Element	Description
NewsBullet	Defines the style for the bullets.
NewsColumnLogo	Defines the style for the logo.
NewsCompanyName A	Defines the style for the company name in the Headlines section.
NewsHeadline	Defines the style for each headline.
NewsPageControl	Defines the style for navigation.
NewsSource	Defines the style for the string that contains the news source description.
NewsSummary	Defines the style for each summary headline.
NewsTable	Defines the style for the table in the Headlines section.
NewsTimeStamp	Defines the style for the time stamp in the Headlines section.
NewsTotalStories	Defines the style for the story count.

Fonts and Link Color Elements

The following elements define font family and size and default link color:

- Body
- TD
- Input
- Select
- Textarea
- A

Form Elements

This topic describes form elements.

Single Column Form Elements

The following table describes the elements that define a single column (sc) form in a customer application where Siebel CRM displays labels adjacent to fields.

Element	Description
scField	Defines the font characteristics of fields.
scLabel	Defines the label font of a label and field pair.
scLabelRight	Defines the label font of a label and field pair. If Siebel CRM uses a language that the reader reads from: • Left to right. The class aligns the second side of the labels. For example, English. • Right to left. The class aligns the first side of the labels. For example, Mandarin.

Multicolumn Editable Form Elements

Siebel CRM uses the multicolumn editable (mce) element in an employee application to conserve space. It displays labels at start of fields. It displays the same field width for each field.

The following table describes the elements that define a multicolumn editable form.

Element	Description
mceField	Defines the font for a field. It sets the field width to one of the following: • 190 pixels wide in an employee application. • 120 pixels wide in a customer application.
mceLabel	Defines the label font of the label in a label and field pair.
mceReadOnly	Defines the characteristics of disabled text.
mceWideFields	Defines the font characteristics for a field that Siebel CRM maps to a placeholder that spans two or four columns.

Login Page Elements

This topic describes the elements that define the usability of the HTML login page that Siebel CRM displays when the user logs in to the Siebel Web Server from a supported Web browser. They do not affect the login page if the user logs in through some other context. For example, when starting up the Mobile Web Client.

The following table describes the elements that define the Login Page.

Element	Description
loginAppTitle	Defines the font and color of the client title.
loginCopy	Defines the color of the copyright text.
loginError	Defines the color of the error message that Siebel CRM displays if a login attempt creates an error.
loginField	Defines the characteristics of login fields.
You can use the following elements: • loginBody • loginForm • loginText	Defines the text characteristics of the login page.
loginLabel	Defines the label characteristics for login fields.
You can use the following elements: • loginBtm • loginMid • loginTop	Defines the background color of the regions in the HTML login page.

Navigation Elements

This topic describes elements that affect the style of objects that allow the user to navigate Siebel CRM.

Site Map Elements

The following table describes the elements that define the Site Map.

Element	Description
fader	Defines the background of the object that divides sections in the Site Map.

Element	Description
screenName1	Defines the characteristics of the screen link that Siebel CRM displays at the start of the Site Map.
screenName2	Defines the characteristics of the screen link that Siebel CRM displays at the lower portion of the Site Map.
viewName	Defines the characteristics of the view link.

Table of Contents Elements

The following table describes the elements that define the table of contents.

Element	Description
TOCRule	Defines the size and color of the horizontal rule that Siebel CRM displays adjacent to the title in the table of contents categorized applet.
TOCTitle	Defines the title text that Siebel CRM displays on a page that uses the categorized applet for the table of contents.

Menu Bar Elements

The following table describes the elements that define menu bars.

Element	Description
globalMenu	Defines how Siebel CRM displays page item links that reference a page container. Siebel CRM typically displays these links in the banner of a customer application. Siebel CRM hard-codes the background color of the menu bar in the jmenubar.js file.

Navigation Tab Elements

Elements that define navigation tabs in the main.css file determine how Siebel CRM displays the following items:

- First-level screen tabs
- Second-level menu drop-down lists in an applet
- Third-level detail tabs

You can use the jctrls.jss file to modify how Siebel CRM displays controls. For more information, see *Control Elements*.

The following table describes the elements that define navigation tabs.

Element	Description
You can define the following elements: • tier1Back • tier1Rule • tier1On • tier1Off	Defines the background and link colors for screen tabs.
You can define the following elements: • tier2Back • tier2Rule • tier2On • tier2Off	Defines the background and link colors for elements that Siebel CRM displays in the view bar frame, including the following items: • Second-level drop-down list • History drop-down list • Dashboard icon • Favorites drop-down list • Search Center icon
You can define the following elements: • tier3Back • tier3Rule • tier3On • tier3Off	Defines the background and link colors for detail tabs.
You can define the following elements: • tier4Back • tier4Rule • tier4On • tier4Off	Defines the background and link colors for subview tabs.

Threadbar Elements

The following table describes the elements that define the threadbar.

Element	Description
threadbar	Defines links in the threadbar that Siebel CRM displays at the start of a view.
threadbarDiv	Defines the separators that Siebel CRM uses between links.

Minibutton Elements

The following table describes the elements that define minibuttons. They define record navigation and other buttons in applets.

Element	Description
You can use the following elements: • minibutton • minibuttonOn • minibuttonOff	Defines the text, link, and background characteristics for On and Off states. For more information, see the documentation in the CCHtmlType.swf file that is located in the following directory: `SIEBEL_ROOT\WEBTMPL`

Page Header Elements

The following table describes the elements that define page headers.

Element	Description
PageHeader	Defines the page title text that Siebel CRM displays on some customer home pages.
PageRule	Defines the size of the horizontal rule that Siebel CRM displays adjacent to the page header text.

Rich Text Component Elements

The following table describes the elements that define a container that uses Rich Text Component (RTC).

Element	Description
You can use one of the following elements: • rtcEmbedded • rtcPopup • rtcReadOnly • rtcTextarea	Defines the dimensions and font characteristics for a container that uses RTC.

Search Center Elements

The following table describes the elements that define the Search Center.

Element	Description
SrchCntrTitle	Defines the font characteristics of the applet title in the Search Center. It is slightly larger than a typical applet title.

Element	Description

Smart Script Player Elements

The following table describes the elements that define SmartScript Player applets.

Element	Description
smartDialog	Defines the font and background characteristics of a SmartScript form.

Status Message Elements

The following table describes the elements that define status messages. The Communications toolbar can display lengthy status messages.

Element	Description
#MsgLayer	Defines a region that the Document Object Model can access. The toolbar can access this element to insert a text message.
Message	Defines the text and background characteristics of the message.

Text Elements

The following table describes the elements that define various text elements.

Element	Description
You can use the following elements: • CmdTxt • CmdTxtNormal	Defines text characteristics of the outside applet text.
error	Defines text characteristics of the error text that Siebel CRM displays in an error message at the start of a form or list.
Required	Defines the color of required text.

Element	Description
Welcome	Defines the text characteristics of the greeting text that Siebel CRM displays in a salutation applet.

11 Operators and Expressions

Operators and Expressions

This chapter describes operators and expressions. It includes the following topics:

- *Operators*
- *Expressions*

Operators

This topic describes operators. It includes the following topics:

- *Operator Precedence*
- *Comparison Operators*
- *Logical Operators*
- *Arithmetic Operators*
- *LIKE and NOT LIKE Operators*
- *NULL Operator*
- *Using the EXISTS Operators with Multivalue Groups*

Operator Precedence

Precedence is the order that Siebel CRM uses to evaluate the operators that a single expression contains. It evaluates higher precedence operators before it evaluates lower precedence operators. It evaluates operators that are equal in precedence from first to last.

You can use parentheses to modify the order of precedence that Siebel CRM uses to evaluate an expression. It evaluates the expression in the parentheses first, and then evaluates parts of the expression that reside outside of the parentheses.

The following table describes the levels of precedence. A lower level indicate higher precedence. For example, level 1 possess the highest precedence.

Level	Operator
1	()
2	- (negation)
3	^ (exponentiation)

Level	Operator
4	The following operators possess this level: • * (multiplication) • / (division)
5	The following operators possess this level: • + (addition) • - (subtraction) • NOT logical operator
6	AND logical operator.
7	OR logical operator.
8	Comparison operators. The following operators possess this level: = (equal to) <> (not equal to) > (greater than) < (less than) >= (greater than or equal to) <= (less than or equal to)

Comparison Operators

The following table describes each comparison operator.

Operator	Description	Example
=	Equality test.	[Last Name] = "Smith"
<>	Inequality test.	[Role] <> "End-User"
>	Greater than.	[Revenue] > 5000
<	Less than.	[Probability] < .7
>=	Greater than or equal to.	[Revenue] >= 5000

Operator	Description	Example
<=	Less than or equal to.	[Probability] <= .7

Logical Operators

The following table describes logical operators.

Operator	Returns TRUE	Returns FALSE
NOT	If Siebel CRM evaluates the condition to FALSE.	If Siebel CRM evaluates the condition to TRUE.
AND	If Siebel CRM evaluates all component conditions to TRUE.	If Siebel CRM evaluates any component condition to FALSE.
OR	If Siebel CRM evaluates any component condition to TRUE.	If Siebel CRM evaluates all component conditions to FALSE.

Arithmetic Operators

The following table describes arithmetic operators.

Operator	Purpose	Example
+	Add	[Record Number] + 1
-	Subtract	[Record Number] - 1
-	Negate	[Revenue] < -100
*	Multiply	[Subtotal] * 0.0625
/	Divide	[Total Items] / [Total Orders]
^	Exponent	[Grid Height] ^ 2

LIKE and NOT LIKE Operators

The LIKE operator matches a portion of one character value to another value. Siebel CRM uses the following format for a LIKE operator in a character string comparison that uses pattern matching:

```
char1 LIKE char2
```

where:

- char1 is the value that Siebel CRM compares to the pattern.
- char2 is the pattern where Siebel CRM compares char1.

To exclude a pattern, you can use the NOT logical operator with the LIKE operator. It uses the following format:

```
char1 NOT LIKE char2
```

or

```
NOT (char1 LIKE char2)
```

Each character is case-sensitive.

The NOT operator requires parentheses.

The Search Engine Table property of a view or applet must reference the same table that the index references. For example, if the search index references the S_EVT_ACT table, then the view and the applet must reference the Action business component.

Wildcard Characters You Can Use with the LIKE Operator

The following table describes wildcard characters that you can use with the LIKE operator.

Character	Description

*	Replace zero or more characters.
	For example:
	`[Last Name] LIKE "Sm*"`
	This example returns all records whose last name starts with Sm. For example, Smith, Smythe, Smart, and so on.
	For example:
	`[Last Name] LIKE "*om*"`
	This example returns all records whose Last Name field includes om. For example, Thomas, Thompson, Tomlin, and so on.
	Using the * (asterisk) wildcard to find all entries in a field might cause a performance problem. If it does, then you can use IS NOT NULL instead. For more information, see *NULL Operator*.

Character	Description

?	Replace one character.
	
	For example:
	
	`[First Name] NOT LIKE "Da?"`
	
	This example returns all records whose first name is three characters long and does not start with the letters Da. For example, it returns records that include Ted, Tom, and Sam. It does not return records that start with Dax or Dan.
	
	For example:
	
	`NOT ([First Name] LIKE "?o?")`
	
	This example returns all records whose first name is three characters long and does not include o as the middle character. For example, it returns Ted and Sam. It does not return Tom or Bob.

NULL Operator

The NULL operator in an SQL statement represents a value that is not known or is not applicable. Siebel CRM evaluates an expression that includes a NULL operator differently than it evaluates other operators. NULL is not a value. A comparison function does not operate correctly if a NULL operator exists in the comparison. For instance, if NULL = NULL is not TRUE. Note the following:

- SQL and Siebel CRM provide special functions and grammar that support NULL, including the IS NULL operator and the IfNull function. A comparison, string concatenation, and Boolean operation include special behavior that handles a NULL operator.
- You can set the type for a NULL operator similar to how you set the type for a value. An operand or result can be a NULL string, NULL number, NULL Boolean, and so on.
- If one side of a comparison is:
  - NULL. The comparison returns a NULL of type Boolean.
  - Is not NULL. The comparison returns TRUE or FALSE. For example, 1>2 is FALSE, and 1<NULL is NULL.
- If one side of an arithmetic operation is NULL, then the operation returns NULL of the appropriate type, except for a string concatenation. NULL adds no characters during a string concatenation operation. For example:
  - 1 + 2 is 3
  - 1 + NULL is NULL (of type Integer)
  - "Fred" + ", Smith" is "Fred, Smith"
  - "Fred" + NULL is "Fred"

IS NULL Operator

The IS NULL operator is a unary operator. A unary operation is an operation that includes only one operand. If you use the IS NULL operator, and if the operand for this operator evaluates to:

- TRUE. IS NULL evaluates to NULL.

- FALSE. IS NULL evaluates to not NULL.

You cannot use the = (equal) operator to determine if a value is NULL because a NULL operand does not contain a value.

If Null Function

The IfNull function contains two arguments and returns the value of the first or second argument depending on if the first argument is NULL. IfNull (a,b) returns one of the following values:

- a if a is not NULL
- b if a is NULL

Siebel CRM sets the return type of the IfNull function to the type of the first argument that it contains, even if this first argument is NULL. Siebel CRM converts the second argument to the type of the first argument before it returns the value of the IfNull function.

Flag Fields and NULL

A flag field is a type of field that Siebel CRM can evaluate to a Boolean value, such as True or False, or Y or N. You can use a flag field to turn functionality on or off. A flag field is typically but not always a calculated field.

If you configure Siebel CRM to query a flag field, then you must use caution. The <> (not equal to) and NOT IN comparison operators cannot evaluate a field that contains a null value. Siebel CRM sets the default value of a flag field to null, so a workflow condition of <>'Y' does not work. To avoid this situation, you can do one of the following:

- Use IS NOT NULL as a comparison operator.
- Use IN ('N',NULL).
- Predefault the business component field to 'N'.

Using the EXISTS Operators with Multivalue Groups

This topic describes how to use the EXISTS operator with multivalue groups.

Using the [NOT] EXISTS Operator with Multivalue Groups

To reference a multivalue group field, you can specify the [NOT] EXISTS operator in a query by example or in the Search Specification property of an object. Siebel CRM uses a multivalue group field to display the child records of a parent record in the parent record applet. For example, assume the following:

- Opportunities are a separate entity.
- Contacts are a separate entity.
- The Opportunity business object references the Opportunity and Contact business components.
- A many-to-many relationship exists between opportunities and contacts:
    - One or more contacts can modify an opportunity.
    - A contact can modify one and only one opportunity.
- A form applet displays and manages opportunity information and displays any contact information that is specific to the opportunity. This applet includes the following fields that reference the Opportunity business component:

- Opportunity Name
- Contact First Name
- Contact Last Name

This form applet displays the opportunity name in a predefined text box control. Siebel CRM defines the contact first name as a multivalue group field and the last name as a multivalue group field instead of as predefined edit controls. If you use query by example on a multivalue field (MVF), then you must include only multivalue fields that Siebel CRM displays in the originating business component.

Assume you set the search specification for the opportunity name to the following value:

```
Wine Festival
```

In this example, the Opportunity business component returns all opportunities that contain a name of Wine Festival.

Assume you set the search specification for the contact last name to the following value:

```
Smith
```

In this example, the Opportunity business component returns all opportunities that include a contact with a last name of Smith. This situation occurs because you defined the search specification on the Opportunity business component and not on the Contact business component.

Examples of Using EXISTS and NOT EXISTS

A query by example that resides in the last name field in the client must use the following format:

```
EXISTS(Smith)
```

A predefined query where the Opportunity is the business component must use the following format:

```
Opportunity.Search = "EXISTS ([Last Name] = ""Smith"")"
```

A search specification that resides in the Search Specification property of the business component or applet must use the following format:

```
EXISTS ([Last Name] = 'Smith')
```

The following example chooses records according to multiple child and grandchild criteria. It defines a more complex query and demonstrates that a query can use all the business components involved in the view without specifying the business component that contains the field:

```
EXISTS ([ChildField1] = 'X' AND [ChildField2] = 'Y')
EXISTS ([GrandchildField1] = 'A' AND [GrandchildField2] = 'B')
```

You can add NOT in front of EXISTS to query for everything other than the value that you include after EXISTS.

Using the EXISTS Operator with a Primary

If a multivalue field includes a primary ID field, and if the Use Primary Join property of the Multi Value Link that this multivalue field references contains a check mark, and if the search specification:

- Includes EXISTS. The query results include every record in the multivalue group that matches the search specification.
- Does not include EXISTS. The query results include every primary record in the multivalue group that matches the search specification.

If you do not specify a primary ID field for the multivalue group, or if the Use Primary Join property does not contain a check mark, then the query must include EXISTS.

If you specify a query that does not use EXISTS, then the object manager automatically inserts EXISTS as part of the search specification. If the field value for a child record is empty, then the object manager uses the EXISTS clause to get the parent record. It does not get any parent record that does not include a child. You can use the following code to query for parent records that do not include a child:

```
NOT EXISTS(*)
```

To query a multivalue group, Siebel CRM specifies a value for a multivalue group or multivalue field for the primary value, by default. For example, if you use the following value to query the Account Team, and if the multivalue group supports a primary, then Siebel CRM returns all records that contain VSILVER as the primary position on the team:

```
VSILVER
```

If a view includes sales team visibility, then you must not use query by example to constrain the account team. Instead, you can use a view that includes the All visibility filter. For example, assume you log in as SADMIN, navigate to the My Accounts view, and then query the Account Team with a login name, such as VSILVER. In this situation, Siebel CRM does not return all accounts where SADMIN is on the team and VSILVER is the primary.

Expressions

This topic describes expressions you can use in a calculated field. It includes the following topics:

- *Functions You Can Use in a Calculated Expression*
- *Using the Division Functions*
- *Using the Ilf Function*
- *Using Julian Functions*
- *Using the Timestamp Function*
- *Using Functions in the Predefault and Postdefault Properties*
- *Using Expressions In the Calculated Field and Field Validation Properties*
- *Using the InvokeServiceMethod in a Calculated Field*
- *Using Calculated Fields with Chart Coordinates*
- *How Siebel CRM Handles Data Types During a Calculation*
- *Guidelines for Configuring Calculated Fields*

A calculated expression is a type of expression that includes a calculated field and a validation expression.

You can use the following functions to set a predefault or postdefault value in a business component. Siebel VB or COM objects do not support these functions:

- AccountId
- ContactLogin
- JobTitle
- OrganizationId

You cannot use a custom function in a calculated expression.

You can only use numbers between negative 2147483647 and 2147483648 in a field validation expression.

For more information, see *Siebel VB Language Reference* .

Functions You Can Use in a Calculated Expression

The following table describes the functions that you can use in a calculated expression. The Result column describes the type of result the function returns. The Query column indicates if Siebel CRM can use the function in a query.

Function	Result	Query	Description
AccountId	String	Yes	Returns the account ID of the current user.
ContactLoginId	String	Yes	Returns the contact ID of the current user. If you configure Siebel CRM to not use the contact login method for a Web application, then this function cannot get any value and it returns an empty string. It is recommended that you use a contact login and an external security authentication service. For example, LDAP.
Count ("mvlink")	Integer	No	Returns the number of rows in the multivalue group that the mvlink defines, where mvlink identifies the name of a multivalue link.
Currency	String	Yes	Returns the currency code for the current position. For example, USD.
DivisionId	Integer	Yes	Returns the division ID of the current user. To limit visibility to employees who reside in the same division as the person who is currently logged in, you can add the following code to the Search Specification property of the applet: `[Division Id] = DivisionId()`
DivisionName	String	Yes	Returns the division name of a user who is an employee. You can use this function to do the following: • Limit visibility to employees who reside in the same division as the person who is currently logged in. • Display the division name of the user who is logging the service request. You can create a new calculated field so that Siebel CRM displays the division name in the calculated field. It displays the division name of the user who is logged in when this user creates a service request. If you use the configuration that the *Using the Division Functions* topic describes, then Siebel CRM predefaults the Reported By Division joined field to this division name, and this field never receives another value after Siebel CRM creates this service request.
EXISTS	String	Yes	For example:

Function	Result	Query	Description
			`IIf(EXISTS([Participant-Employee Login] = LoginName()), "Y", "N")`

GetProfileAttr ("Attribute")	String	Yes	Returns the value that Siebel CRM stores in the profile attribute if this attribute is defined. You can use this function in personalization to do the following:
			• Get attribute values in a user profile.
			• Send information from a script to the client.
			You can set a personalization attribute for a session that is equal to the value of the shared global attribute, and then reference the personalization attribute in a calculated field.
			GetProfileAttr returns NULL for an undefined attribute or for an attribute that is not configured. For example:
			`GetProfileAttr("Attribute") = ""`
			If the attribute does not exist, or if it exists and if the value is different than "", then this code returns FALSE.
			For example:
			`GetProfileAttr("Attribute") IS NULL`
			If the attribute does not exist, then this code returns TRUE.

IfNull (expr1, expr2)	Type of expr1	Yes	Returns one of the following values: • If expr1 is not NULL, then this function returns the value of expr1. • If expr1 is NULL, then this function returns the value of expr2.
IIf (testExpr, expr1, expr2)	Type of expr1	No	Returns one of the following values: • If testExpr is TRUE, then this function returns the value of expr1. • If testExpr is not TRUE, then this function returns the value of expr2. If the expression references a DTYPE_NUMBER field, then the data type of expr1 determines the data type of the value that this function returns. For more information, see *Using the IIf Function*.
InvokeServiceMethod ("ServiceName", "MethodName", "InputProp1=val1, InputProp2=val2, ...", "OutputProp")	String	No	For more information, see *Using the InvokeServiceMethod in a Calculated Field*.
JobTitle	Integer	Yes	Returns the Job Title of the employe who is currently logged in. It is similar to the PositionId and DivisionId methods.

Function	Result	Query	Description
JulianDay	Integer	Yes	Equal to the Oracle Julian Day for all dates in the 20th and 21st centuries.
JulianMonth	Integer	Yes	Equal to: `JulianYear()* 12 + currentMonth` where: • January = 1.
JulianQtr	Integer	Yes	Equal to: `JulianYear() * 4 + currentQuarter` where: • currentQuarter = (currentMonth - 1) / 3 + 1 rounded down to the next integer.
JulianWeek	Integer	Yes	Equal to the following, rounded down to the next integer: `JulianDay()/ 7`
JulianYear	Integer	Yes	Equal to the current year plus 4713.
Language	String	Yes	Returns the language code for the language that the client currently uses. For example, ENU. One of the following items sets this language: • Language parameter in the CFG file • /L parameter when starting Siebel CRM. This setting is not the OM - Resource Language Code server parameter that the Administration - Server Configuration screen contains.
Left (text, integer)	String	Yes	Returns the first n characters in the text string or field. For example, the following code returns Adam: `Left ("Adams", 4)`
Len	String	Yes	Returns the length of a string or string variable. You can specify the number of characters between parentheses.
Locale	String	Yes	Returns the locale code that is associated with the Application Object Manager (AOM). A locale is a set of rules that determine how Siebel CRM displays data to the user or receives data from the user. Siebel CRM stores locale codes in the LOCALE_CODE column of the S_LOCALE table. For more information, see *Siebel Global Deployment Guide* .

Function	Result	Query	Description
LocalCurrency	String	Yes	Returns the currency code for the client computer. For example, JPY.
LoginId	String	Yes	Returns the login ID. For example, 0-3241.
LoginName	String	Yes	Returns the login name. For example, BSTEVENS.
Lookup (type, value)	String	No	Returns the value of the ORDER_BY column of a row in the S_LST_OF_VAL list of values where: • The TYPE column matches the type argument. • The VALUE column matches the value argument. You can use this function to avoid creating joins in a business component.
LookupExpr (type, value_expr)	String	No	Returns the value of the ORDER_BY column of the first row in the S_LST_OF_VAL list of values that the expression evaluates to TRUE. To do this, it searches rows in this list of values where the TYPE column matches the type argument. It evaluates the contents of the VALUE column as an expression. This function does an in-memory linear parse evaluate search. You must make sure that the LOV type contains less than 30 rows.
LookupName (type, lang_ind_code)	String	Yes	Returns the language-independent code that resides in the NAME column of the S_LST_OF_VAL list of values where: • The TYPE column matches the type argument. • The NAME column matches the lang_ind_code argument. • The LANG_ID column matches the language code of the language that is currently active. This function gets the untranslated value from this list of values.
LookupTranslation([fieldname])	String	No	Returns the value of the field in the language that the client displays.
LookupValue (type, lang_ind_code)	String	No	Returns the display value that the VAL column contains in a row in the S_LST_OF_VAL list of values where: • The TYPE column matches the type argument. • The NAME column matches the lang_ind_code argument. • The LANG_ID column matches the language code of the currently active language. This method finds the display value for the lang_ind_code. If it does not find this value, then it returns the value that lang_ind_code contains. This function gets the translation of the untranslated value from this list of values.

Function	Result	Query	Description
Max ([mvfield])	Integer	No	Returns the maximum value from a field in child records. You must define the child record that this function examines as a multivalue field that a multivalue group contains. This multivalue group is associated with the business component that contains the field that this method evaluates. For example: `Max ([Number of Employees])` This code gets the maximum number of employees for all locations.
Min ([mvfield])	Integer	No	Returns the minimum value from a field in child records. You must define the child record that Siebel CRM examines as a multivalue field that is part of a multivalue group. The multivalue group is associated with the business component of the field that Siebel CRM evaluates. For example: `Min ([Number of Employees])` This code returns the minimum number of employees that exist for all locations.
OrganizationId	Integer	Yes	Returns the organization ID of the user who is currently logged in. It returns this value if Siebel CRM does not define an organization for the user. For example, if the user uses a customer application, then it returns the ID of the Default Organization.
OrganizationName	String	Yes	Returns the organization name of a user who is an employee.
ParentBCName	String	Yes	Returns the name of the parent business component of an active link. For example, Opportunity.
ParentFieldValue (field_name)	String	Yes	Returns the value of the field_name field that resides in the parent business component. It returns the result as a string. If Siebel CRM updates the parent row, then it does not modify this result. You must use Link Specification = TRUE to export the parent business component field. If a parent business component does not exist, or if Siebel CRM does not instantiate it, such as in a script, then this function returns the following error: `No active link`
PositionId	String	Yes	Returns the position ID of the user who is currently logged in as an employee. For example, 0-4432.
PositionName	String	Yes	Returns the position name of the user who is currently logged in as an employee.

Function	Result	Query	Description
Preference ("category", "pref_name")	String	Yes	Returns the value for a category and preference name. For example, the Price List field in the Service Agreement business component contains the following predefault value: `Expr: "Preference ((""Quote"", ""PriceList"")"` This example returns the price list that Siebel CRM uses for a quote that the Price List Sales Methodology view of the User Preferences screen specifies. This view resides in the client.
Right (text, integer)	String	Yes	Returns the last n characters in the text string or field. For example, the following code returns dams. `Right ("Adams", 4)`
RowIdToRowIdNum ([Id])	String	Yes	Converts an alphanumeric row ID to a unique, numeric row ID in the Service Request business component.
Sum ([mvfield])	Integer	No	Sums the values from a field in child records into a field in a parent record. You must define this child record as a multivalue field that is part of a multivalue group. This multivalue group is associated with the business component that contains the field in the parent record.

SystemPreference ("Preference")	String	Yes	Returns the value of a system preference. For example:
			`SystemPreference("Training: Employee Calendar")`
			This code returns TRUE for an employee.
			You can use this function to set a predefault or postdefault value. For example, the following code sets a predefault value:
			`Expr: 'SystemPreference("Default Time Zone")'`
			You can set these values in the following ways:
			• In the client. Use the System Preferences view of the Administration - Application screen.
			• In Siebel Tools. Click the Screens menu, System Administration, and then click System Preferences.

ToChar ([field_name], 'format')	String	No	Returns a string that represents a number or date in a format that the optional `format` argument specifies. For example:
			`ToChar([Start Date], 'MM/DD/YYYY')`
			This code returns the starting date of a record as a string that uses the following format:
			`MM/DD/YYYY`

Function	Result	Query	Description
			The following examples describe the difference between using # and 0 for a number that does or does not include decimal places. The # symbol only returns decimal places if they exist. The 0 symbol adds decimal places if the number contains fewer decimals than the format argument specifies: • ToChar (10, '##.##') returns 10 • ToChar (10, '##.00') returns 10.00 • ToChar (10.2345, '##.00') returns 10.23 • ToChar (10.2345, '##.##') returns 10.23 If you do not specify the **format** argument, then the ToChar function returns a string that it formats according to the current locale. For example, if the current locale is ESN, then ToChar formats the string according to the ESN locale.
Timestamp	Date Time or UTC Date Time	Yes	For more information, see *Using the Timestamp Function*.
Today	Date	Yes	Returns the date for today. For example, 1/26/2012. The Today function and the Timestamp function functions might return different results. For more information, see *Using the Timestamp Function*.

UtcConvert ("utc_date_time", "time_zone")	Date Time	Yes	This function converts UTC time to local time in the time zone that the time_zone argument specifies. For example:
			`UtcConvert("12/14/2012 5:07:05 PM", "Eastern Standard Time")`
			This code returns the following value:
			`12/14/2012 12:07:05 PM`

UtcOffset ("utc_date_time", "time_zone")	Integer	Yes	Returns the UTC offset in minutes for a date and time in the time zone that the time_zone argument specifies. It returns one of the following values:
			• Positive value. Indicates the number of minutes ahead of UTC.
			• Negative value. Indicates the number of minutes behind UTC.
			For example:
			`UtcOffset("3/30/2012 14:00:00", "Pacific Standard Time")`
			This code returns the following value because 3/30/2012 14:00:00 occurs 7 hours behind UTC:
			`-420`
			For example:

Function	Result	Query	Description

			`UtcOffset("3/30/2012 14:00:00", "India Standard Time")`
			This code returns the following value because the time occurs 5.5 hours ahead of UTC:
			`330`

Using the Division Functions

This topic includes examples that use the division functions.

Using the Division Name Function to Display the Division Name

This example describes how to create a calculated field that displays the division name of the user who is currently logged in. If this user creates a service request, then Siebel CRM displays this field.

To use the Division Name function to display the division name

1. In Siebel Tools, in the Object Explorer, click Business Component.
2. In the Business Components list, locate the Service Request business component.
3. In the Object Explorer, expand the Business Component tree, and then click Field.
4. In the Fields list, create a new field using values from the following table.

Property	Value
Calculated	TRUE
Calculated Value	DivisionName()
Name	Division (Calc)
Parent Name	Service Request
Type	DTYPE_TEXT

5. In the Fields list, create another new field using values from the following table.

Property	Value
Column	ATTRIB_03

Property	Value
Join	S_SRV_REQ_X
Name	Reported By Division
Pre Default Value	Field: 'Division Name'
Read Only	TRUE

6. Display the field you created in the relevant applets.

Searching or Sorting According to the Division

You can use the DivisionId function and DivisionName function in a search specification, sort specification, or calculated value. For example, assume Siebel CRM must display only the employees who reside in the same division as the person who is currently logged in. To configure this requirement, you can add the following DivisionId function to the Search Specification property of an applet:

```
"DivisionId() = [Division Id]"
```

These functions are not available in a script. To get the division ID or division name in a script, you must use the GetFieldValue business component method. For example, you can use the following code in a Siebel eScript script to get the division ID:

```
var oEmpl = TheApplication().GetBusObject("Employee");

var bcEmp = oEmpl.GetBusComp("Employee"); bcEmp.ActivateField("Division
Id"); bcEmp.ActivateField("Login Id"); bcEmp.SetSearchSpec("Login Id",
TheApplication().LoginId()); bcEmp.ExecuteQuery(ForwardOnly); bcEmp.FirstRecord; var
divId = bcEmp.GetFieldValue("Division Id");
```

Using the IIf Function

This topic describes using the IIf Function with string concatenation. The following example assigns an expression to the Calculated Value property:

```
[Field]
Name = "Full Name"
TextLen = 102 // Last Name + First Name + 2
Calculated = "TRUE"
CalculatedValue = "[Last Name] + "," + [First Name]"
```

Double quotation marks must enclose the "," string constant because double quotation marks enclose the entire value. If the Last Name field contains NULL, and if the First Name contains Bob, then the Full Name field contains the following value:

```
, Bob
```

Consider the following example:

```
CalculatedValue = "[Last Name] + IIf ([Last Name] IS NULL, "", ",") + [First Name]"
```

If the Last Name field contains NULL, and if the First Name field contains Bob, then the result contains the following value:

```
Bob
```

The CalculatedValue expression must reside on one line.

Using Julian Functions

The Julian functions must include the Today function or a field name as an argument. For example:

```
JulianMonth([Created]) (of a field) or JulianMonth(Today()) (of the current date).
```

The following example includes the JulianMonth function in a predefined query to get the opportunities that Siebel CRM closed during the previous month:

```
'Opportunity'.Search = "JulianMonth([Close Date]) = JulianMonth(Today()) - 1"
```

The following example returns all service requests that include a commit time that occurs two days in the future:

```
'Service Request'.Search = "JulianDay([Commit Time]) = JulianDay(Today()) + 2"
```

The following example sets a variable to the integer value of the current month:

```
currentMonth = JulianMonth(Today()) - JulianYear(Today()) * 12
```

Using the Timestamp Function

The Timestamp function returns the date and time for today. For example:

```
01/02/2012 11:15:22
```

You can use this function in a query. For example:

```
Created >= Timestamp() - 0.1
```

This code returns records that Siebel CRM created in the last one-tenth of a day.

Any expression that uses the TimeStamp function uses the date and time from the user computer even if the Siebel Server computer uses a different time zone.

The Today function and the Timestamp function might return different results. The TimeStamp function does UTC (universal time code) conversion. The Today function does not do UTC conversion.

Configuring Siebel CRM to Do Calculations with the Timestamp Function

Use the Timestamp function for fields of type DTYPE_DATETIME and DTYPE_UTCDATETIME. If you configure Siebel CRM to do a calculation that involves seconds, then it is recommended that you use at least five significant figures for accuracy.

You can configure Siebel CRM to do calculations with a date and time field in a calculated field. If the user enters a number in a date and time field, then:

- Integers and hours represent days.
- Fractions represent minutes and seconds.

For example, to add one minute to the current date and time, you can use the following expression, where one day contains 1440 minutes:

```
Timestamp() + 1/1440
```

In this example, Siebel CRM adds the product delivery interval, in seconds, to the current date and time:

```
Timestamp() + [Product Delivery Interval]/86400
```

You must set the Type property of the calculated field to DTYPE_DATETIME or DTYPE_UTCDATETIME.

Using Functions in the Predefault and Postdefault Properties

The Pre Default Value property of a field assigns a value to this field for a new record. If Siebel CRM displays this field, and if it is not set to Read Only, then the user can modify this field. For example, the Currency Code field contains the following predefault value:

```
System: Currency
```

Siebel CRM sets the currency code for a new contact to the default system currency.

If you set the predefault value for a date and time field, then you must not use quotes to enclose the value. For example, assume you use the following predefault value for a DTYPE_UTCDATETIME field:

```
"07/31/2007 23:59:59"
```

This configuration results in an error message that is similar to the following:

```
The value "'07/31/2007 23:59:59'" cannot be converted to a date time value.(SBL-DAT-00359)
```

The Post Default Value property of a field assigns a value to a field before Siebel CRM writes the record to the database. For example, the Personal Contact field contains a postdefault value of N. If the user does not designate a new contact as personal, then Siebel CRM assumes that it is not a personal contact.

If the Type property of a field contains any of the following values, then this field is a date and time field:

- DTYPE_DATE
- DTYPE_DATETIME
- DTYPE_TIME
- DTYPE_UTCDATETIME

The following table describes the format that Siebel CRM uses in a function that references a predefault or postdefault field.

Function	Result Type	Description
Expr: 'Timestamp()'	Date Time or UTC Date Time	Returns the date and time. This expression is equivalent to the Timestamp function that returns the current date and time. It returns the same value as System: Timestamp. For example: `Expr: 'Timestamp()' + 0.041667` This code returns the current date and time plus one hour. For more information, see *Using the Timestamp Function*.

Function	Result Type	Description

Expr: 'Today()'	Date	Returns the day. This expression is equivalent to the Today function. It returns the current date. It returns the same value as System: Today. For example:
		
		`Expr: 'Today() - 1'`
		
		This code returns the date for yesterday.
		
		You can use the Today function only with a DTYPE_DATE field. If you use it with a DTYPE_DATETIME or DTYPE_UTCDATETIME field, then Siebel appends the following value to the current date:
		
		`12:00:00 AM`

Field: 'FieldName'	String	Returns a value that the FieldName field of the current business component contains. If FieldName is a joined field, then Field: 'FieldName' does not work in the Predefault Value property. You must make sure the field that Siebel CRM defaults and the referenced field are the same field type. For example: • If the defaulted field is a DTYPE_DATE field, and if the referenced field is a DTYPE_DATETIME field or a DTYPE_UTCDATETIME field, then Siebel CRM does not include time in the defaulted field. • If the defaulted field is a DTYPE_DATETIME field or a DTYPE_UTCDATETIME field, and if the referenced field is a DTYPE_DATE field, then Siebel CRM appends the following string to the defaulted field: `12:00:00 AM`

Parent: 'BusComp.Field', 'BusComp.Field'	String	Returns the value that a field in the parent business component contains.
		
		To default a value, the Link Specification property of the field in the parent business component must be set to TRUE.
		
		You can include multiple BusComp.Field arguments where a comma separates each argument. Siebel CRM examines these arguments from first to last until it finds a value. For example:
		
		`Parent:`
		`'ServiceRequest.Account', 'Account.Name'`
		
		You must include a space after each comma that separates a field. If the business component name includes an apostrophe, then you must enclose the name with double quotation marks. For example:
		
		`Parent: "FINS AG Agent's`
		`Contracts.Status Of Contract"`
		
		You can use a System call to terminate a chain of parent calls. For example:
		
		`Parent:`
		`'Opportunity.Currency Code', 'Account.Currency Code',`
		`System: Currency`

Function	Result Type	Description
System: Creator	String	Returns the login name. For example, BSTEVENS.
System: CreatorId	String	Returns the login ID. For example, 0-3241.
System: Currency	String	Returns the currency for this position. For example, USD. The Currency field in the Divisions or Organizations view of the Group Administration screen sets this currency. If the division uses a currency that is different than the currency that the organization uses, then Siebel CRM uses the division currency.
System: LocalCurrency	String	Returns the currency that the client computer uses. For example, JPY.
System: OrganizationId	String	Returns the organization ID. For example, 1-24E1.
System: OrganizationName	String	Returns the organization name. For example, Siebel Service.
System: Position	String	Returns the position name. For example, VP of Sales.
System: PositionId	String	Returns the position ID. For example, 0-4432.

System: Timestamp	Date Time or UTC Date Time	Returns the date and time for today. For example:
		
		`04/02/12`
		`11:15:22`
		
		If you use the System: Timestamp function as the predefault value for a field, then the data type for this field must be DTYPE_DATETIME or DTYPE_UTCDATETIME.

System: Today	Date	Returns the date for today. For example: `04/26/12` If you use the System: Today function as the predefault value for a field, then the data type for this field must be DTYPE_DATE.

Using Expressions In the Calculated Field and Field Validation Properties

The Calculated Value property of a field specifies an expression that Siebel CRM uses to calculate the value of a field. The Validation property restricts the values for a single value field. Siebel CRM evaluates the Validation property only if the user modifies the value in this field in the client. It evaluates the Validation property of the business component fields that the current applet references. If these fields are part of other business components, then Siebel CRM also validates these fields.

Note the following:

- The entire expression for the calculated value or validation must reside on one line.
- The Calculated Value property and the Validation property can contain no more than 255 characters.
- To reference a field value, you must use `[Field Name]`.
- You cannot use the Validation property to make the field required if this property references another field value.
- Siebel CRM cannot validate a multivalue field.

Elements You Can Use in Calculated Fields and Query By Example

The following table describes the elements that you can use in the Calculated Value property, Validation property, or in a query by example expression.

Element	Description
Calculated value or validation statement	You can use the following statements: • condition • expression
Condition	You can use the following conditions: • comparison • AND • NOT • OR
Comparison	You can use the following comparisons: • = (equal to) • < (less than) • > (greater than) • <= (less than or equal to) • >= (greater than or equal to) • ~ (tilde. Case-insensitive string comparison in the Calculated Value property.) • NOT (not equal to) • [~] LIKE (Case-insensitive string comparison)
Expression	You can use the following expressions: • constant • identifier • function
Constant	You can use the following constants for the Calculated Value property, the Validation property, and query by example: • number.

Element	Description

	• string. You must enclose this string in double quotes.
	• date. You must enclose this date in double quotes and you must use a forward slash (/) for the separator:
	`"MM/DD/YYYY"`
	• time. You must enclose this time in double quotes and you must use a colon (:) for the separator:
	`"HH:MM:SS"`
	• date and time. You must enclose this date and time in double quotes and you must use a space to separate the date from the time:
	`"MM/DD/YYYY HH:MM:SS"`
	To reference a date and time format in a control or list column, you must use the format that the Control Panel specifies.
	You can use the following constants only for the Calculated Value property, the Validation property, but not query by example:
	• integer.
	• currency.
	• Boolean.
	• phone number. You must enclose this phone number in double quotes.

Identifier	[field name]

Searching with Query By Example

You can configure Siebel CRM to use query by example (QBE) through list columns or controls as a predefined query or in the Search Specification property. The format is slightly different in the client but in all situations the format is simple BNF (Backus-Naur Format).

Using the InvokeServiceMethod in a Calculated Field

The InvokeServiceMethod method calls a business service from a calculated field and returns OutputProp. If you configure Siebel CRM to call this method, then it is recommended that you use the following guidelines:

- This method requires an input argument in the third field. If you do not specify this argument, then the calculated field does not provide a return value and a parsing error results. If the business service method does not require an input argument, then you must provide an argument as a placeholder. For example, if MyMethod does not use an input argument, then you can use code that is similar to the following:

```
InvokeServiceMethod("MyService","MyMethod", "a=a","MyReturn")
```

- If you configure Siebel CRM to send a field value instead of a string literal as an input argument, then you must enclose the field name in brackets. The following example uses input arguments that specify the value in the Name and Location fields:

```
InvokeServiceMethod("MyService","MyMethod", "prop1=eval([Name]),prop2=eval([Location])","MyReturn")
```

Siebel CRM evaluates the following code before it calls the business service:

```
eval(expression)
```

- The name of the return property in the calculated field, such as MyReturn in these examples, must match the name of a property in the output property set of the business service. If Siebel CRM cannot call the method due to this incorrect format, then it does not create an error and the calculated field is empty.

You must not display a calculation expression that calls a business service in a list applet. Doing so might result in poor performance because Siebel CRM repeatedly instantiates the business service each time it displays the field in the list.

Using Calculated Fields with Chart Coordinates

This example uses calculated fields with chart coordinates. Assume you must set the following coordinates:

- 0-200
- 200-999
- 1000-4999
- 5000-24999
- 25000+

To use calculated fields with chart coordinates

1. Create a calculated field that contains the one relevant value of the five coordinate values.

   For example, if the record contains a value of 500, then the calculated field value is 200-999.
2. To view the coordinates in the chart in the order you require, create a list of values that contains the following values:
   - 0-200
   - 200-999
   - 1000-4999
   - 5000-24999
   - 25000+

How Siebel CRM Handles Data Types During a Calculation

The Type property of a field specifies the data type. A multivalue field gets the data type from the source field. Siebel CRM can convert some types to another type during a calculation. Some operations might create different results with different types. For example, "10" + "10" creates "1010", while 10 + 10 creates 20.

An item that occurs first in a calculation possesses a higher precedent. For example, "10" + 10 creates the following result. Siebel CRM converts the argument that is after the operator to a string:

```
"1010"
```

For example, 10 + "10" creates the following result. Siebel CRM converts the argument that is after the operator to a number:

```
20
```

The Type property of a field can contain one of the following values. The user cannot query a DTYPE_NOTE field:

- DTYPE_BOOL
- DTYPE_CURRENCY
- DTYPE_DATE
- DTYPE_DATETIME
- DTYPE_ID
- DTYPE_INTEGER
- DTYPE_NOTE
- DTYPE_NUMBER
- DTYPE_PHONE
- DTYPE_TEXT
- DTYPE_TIME
- DTYPE_UTCDATETIME

How Data Type Affects Order of Precedence

If the Calculated Value property references more than one field value, and if these fields use different data types, then the order of the data types can affect the calculation. For example, the Quote Item business component includes the Line Total calculated field. This field uses the following calculated value:

```
[Item Price] * [Quantity]
```

where:

- The data type of the Item Price field is DTYPE_INTEGER.
- The data type of the Quantity field and the Line Total field is DTYPE_CURRENCY.

In this example, if Item Price is 2.25, and if Quantity is 5, then Siebel CRM sets the Line Total to 11.25.

Assume you modify the calculated value of the Line Total field to the following:

```
[Quantity] * [Item Price]
```

In this example, if Item Price is 2.25, and if Quantity is 5, then Siebel CRM sets the Line Total to 11.00.

Guidelines for Configuring Calculated Fields

If you configure a calculated field, then use the following guidelines:

- You must not use a calculated field to do an update. A calculated field does not support an update for even a simple expression, such as [Field]). The exception is that a specialized business component can override SqlSetFieldValue. For important caution information, see *Using Specialized Classes*.
- If the calculated value of a calculated field is not a DTYPE_TEXT value, then you must explicitly specify the field type.
- You must not configure Siebel CRM to store a calculated field in a column.
- You must not create validation criteria on a calculated field. Siebel CRM ignores this criteria.

- Siebel CRM supports a query on a calculated field. The work that Siebel CRM performs if it does a query on a calculated field depends on the functions that it uses in the calculation. If Siebel CRM:
  - Can use the function directly in the WHERE clause in the SQL statement, then it uses the function.
  - Cannot use the function directly in the WHERE clause, then Siebel CRM must examine each record in the business component to identify the records that it displays to the user. This configuration impacts performance. The IIf function and Lookup function are examples of functions that Siebel CRM cannot use in the WHERE clause.
- You must not configure Siebel CRM to sort calculated fields.
- You can configure Oracle's Siebel CRM so that a calculated field references the results of another calculated field in the same business component.
- To place a link in a calculated field, you can use the following HTML tag:

