Welcome to Oracle Service Cloud Ask the Experts

Extending Data Into Your Site

Presenter: Levi Dyckman

Dial-In: 1-866-682-4770

Conference Code: 7817715

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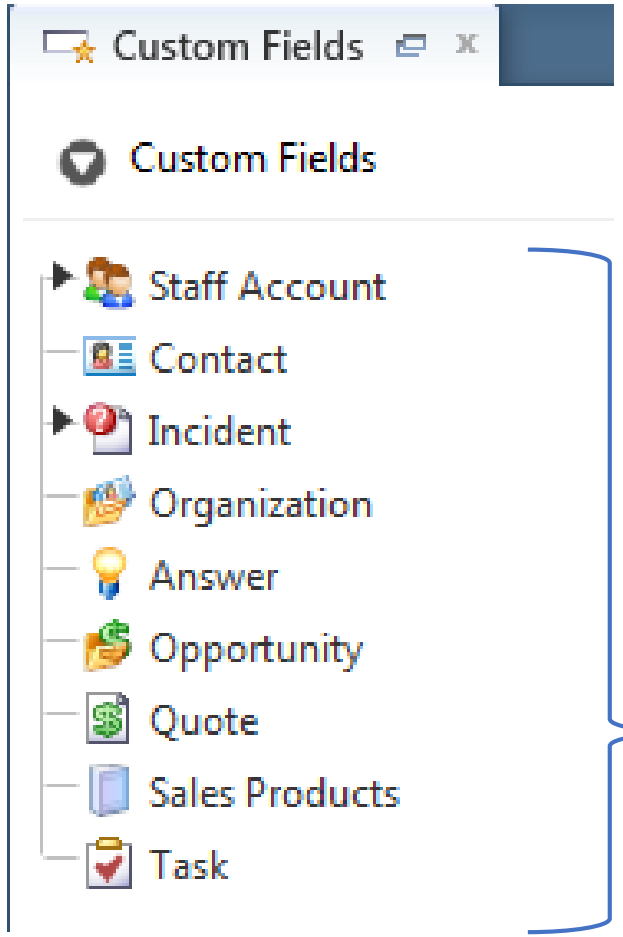
What's the Point?

1. Design and implement solutions utilizing custom fields and objects while leveraging them to their optimal extent.
2. Accommodate specific processes that are not accounted for with out-of-the-box data points.

Overview

- Custom Fields and Custom Objects
- Data Types
- Considerations for Indexing
- Relationships
- Best Practices, Gotchas, Impacts, and Considerations
- Demo
- Questions

Custom Fields - Extend existing predefined tables



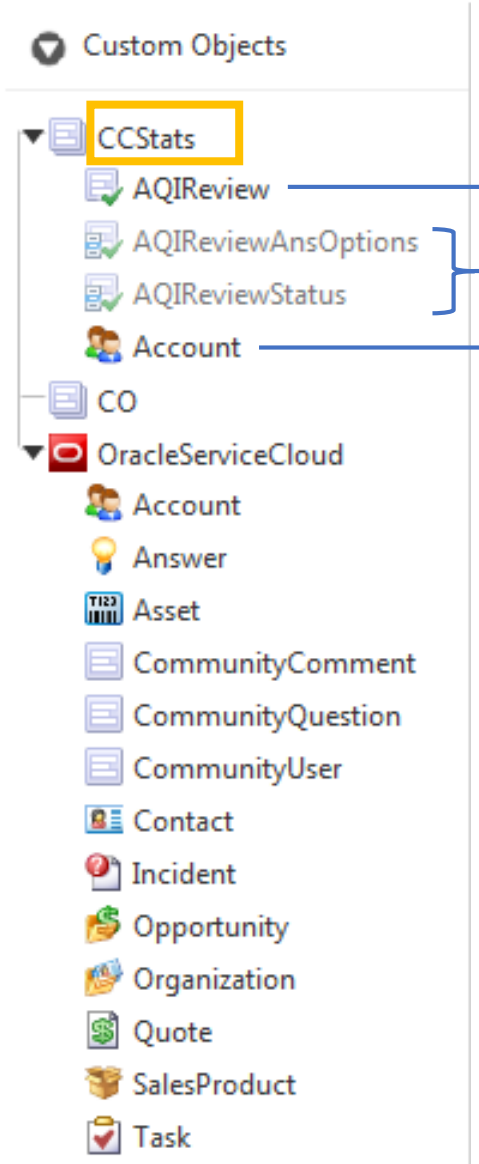
Predefined tables

Standard Fields

Custom Fields

ref_no	subject	other standard	c$alternateemail	c$esc	c$esc_note	other CFs
180116-000000	LD test incident 1		some1.dude1@junk.inv	1	Escalated because....	

Custom Objects

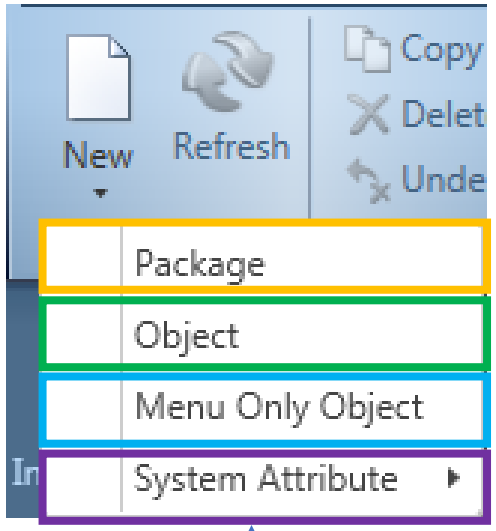


CCStats$AQIReview
-ID
-Answer
-UserFriendlyName

CCStats$AQIReviewAnsOptions
-ID
-Name
-DisplayOrder

CCStats$AQIReviewStatus
-ID
-Name
-DisplayOrder

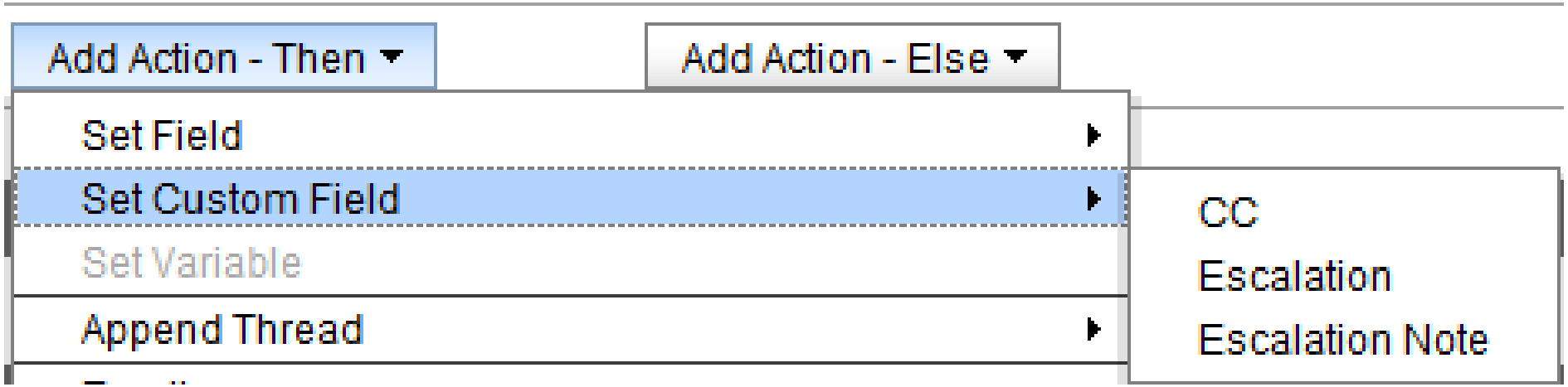
Accounts
-acct_id
-login
-CCStats$LeadAgent



Similar to Custom Fields

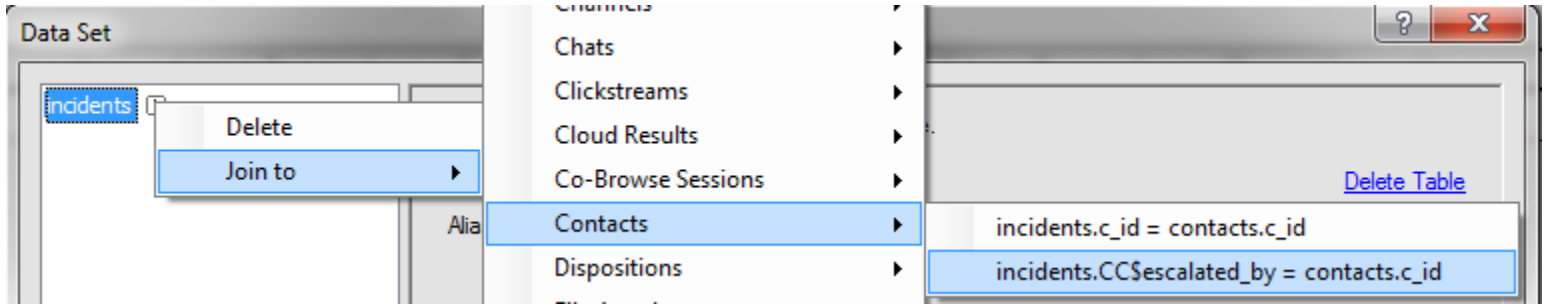
Custom Fields vs. Custom Attributes - Rules

- Custom Fields only are available in business rules



Custom Fields vs Custom Attributes - Relationships

- Custom Attributes are capable of relationships to other tables/objects; Custom Fields are NOT.



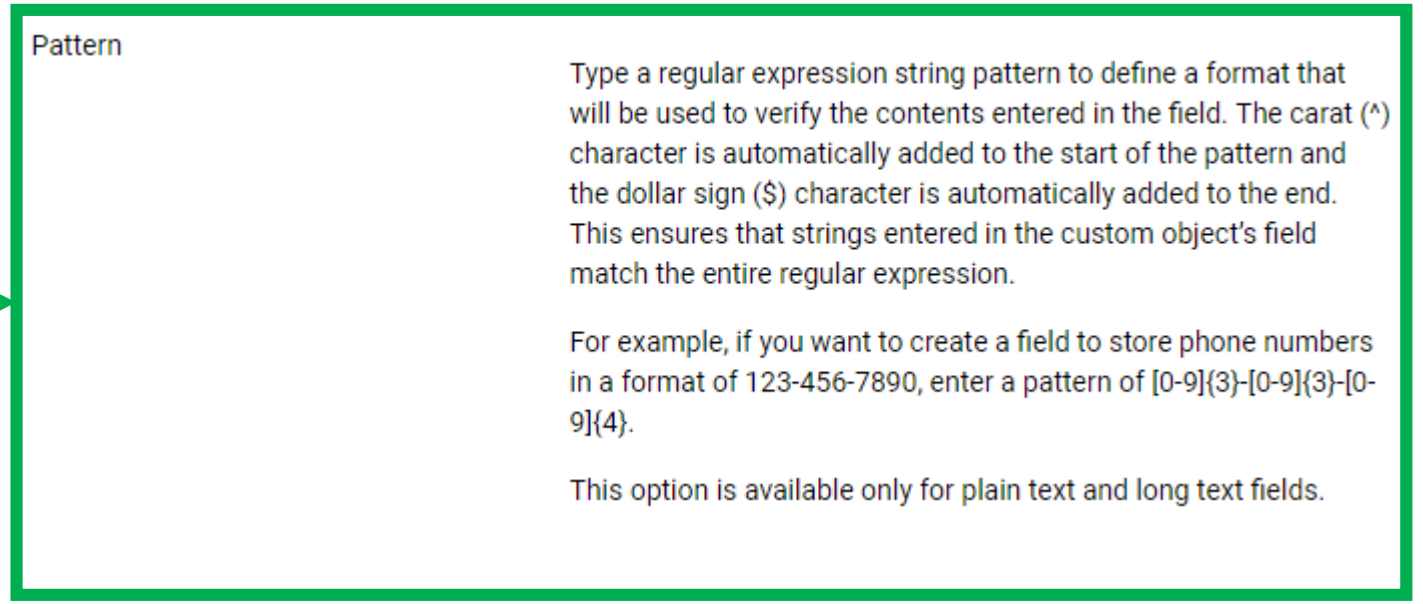
Custom Fields vs. Custom Attributes – Data Dictionary

- Custom Attributes will be in the Data Dictionary.

Table Label	Incidents
Table Description	Contains information on incidents in Oracle Service Cloud.
Tbl	1
Visibility	Service
Custom Fields	Allowed
Primary Key	i_id
Columns	AND/OR (search_and_or) Asset ID (asset_id) Assigned Account (assgn_acct_id) Attributes (attr) Banner Account (banner_acct_id) Banner Flag (banner_flag) Banner Text (banner_txt) CCSescalated_by

Custom Fields vs. Custom Attributes - Masking

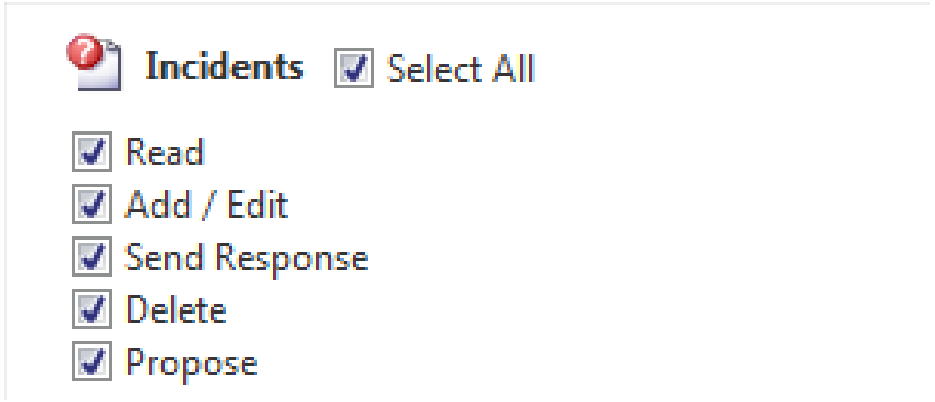
- Both have masking, but it varies.
- Advantage Custom Attributes for utilizing regex
- Custom Fields



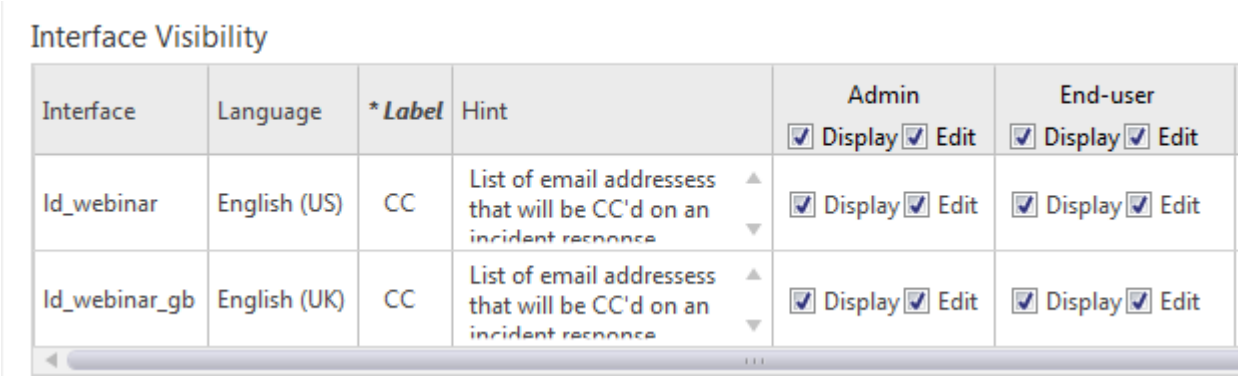
Mask Type	Mask Pattern	Masked Text Field
Social Security Number	M#M#M#F-M#M#F-M#M#M#M#	###-##-####
123-45-6789		

Custom Fields vs. Custom Attributes - Permissions

- Both inherit permissions from profile.



- Custom Fields have an additional layer of visibility settings



Custom Fields vs. Custom Attributes – Final Thoughts (Finally)

- Use Custom Attributes when possible
  - Lack of availability in business rules is biggest weakness
- Use Custom Fields when needed for business rules
  - e.g. rule escalations or order of operations
- Possible to create one of each and utilize the benefits of both
  - But not an ideal solution

Data Types

Custom Fields

- Date Field
- Date/Time
- Integer
- Menu
- Text Area
- Text Field -> Plain Text
- Text Field -> URL
- Text Field -> Email Address
- Text Field -> Phone Number
- Yes/No

Custom Objects

- Date
- Date Time
- Integer
- Menu
- Text -> Long Text
- Text -> Plain Text
- Text -> URL
- Text -> Email
- N/A
- Yes/No

Data Types – Date Considerations

- Need pre-1970 capabilities?
- Are the hour, minutes, and seconds necessary?

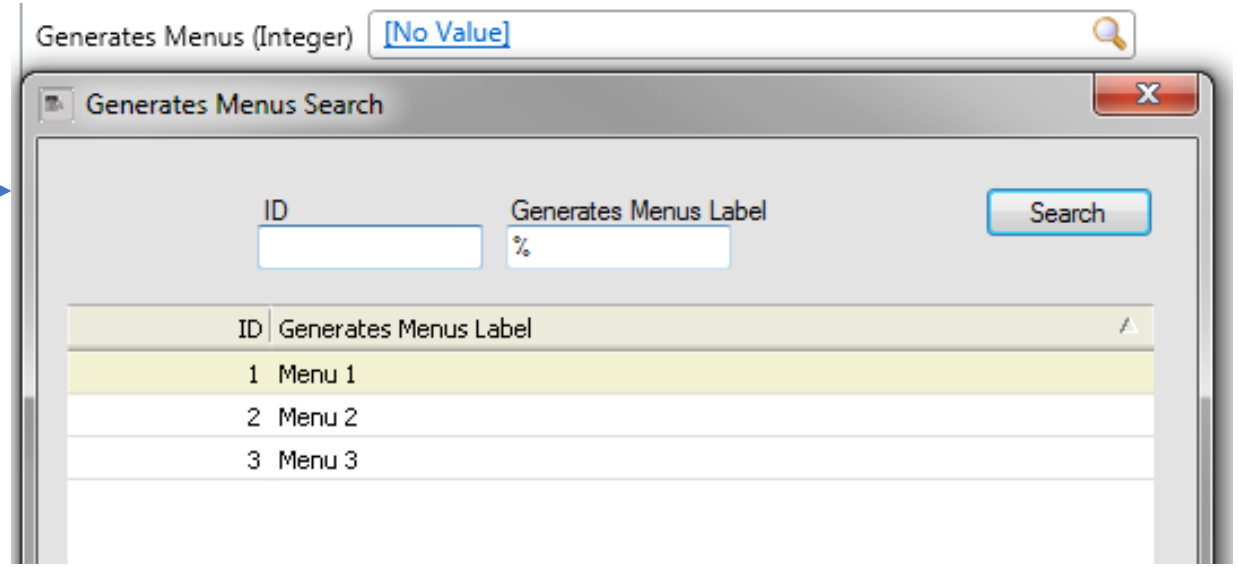
Data Types – Plain Text

- Size option of 1-255

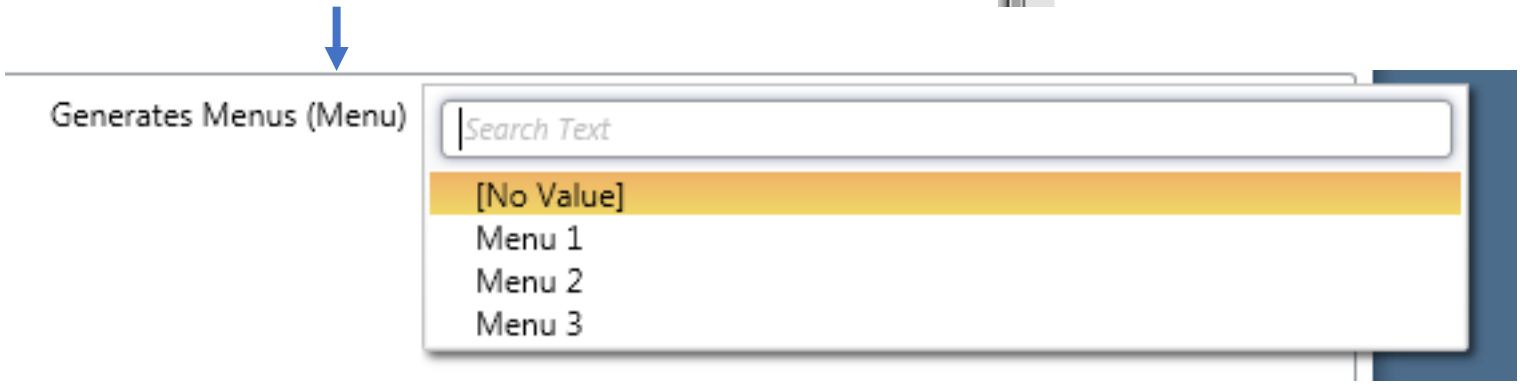
Data Types – Objects that “Generate Menus”

- Consider the UI implications

Integer

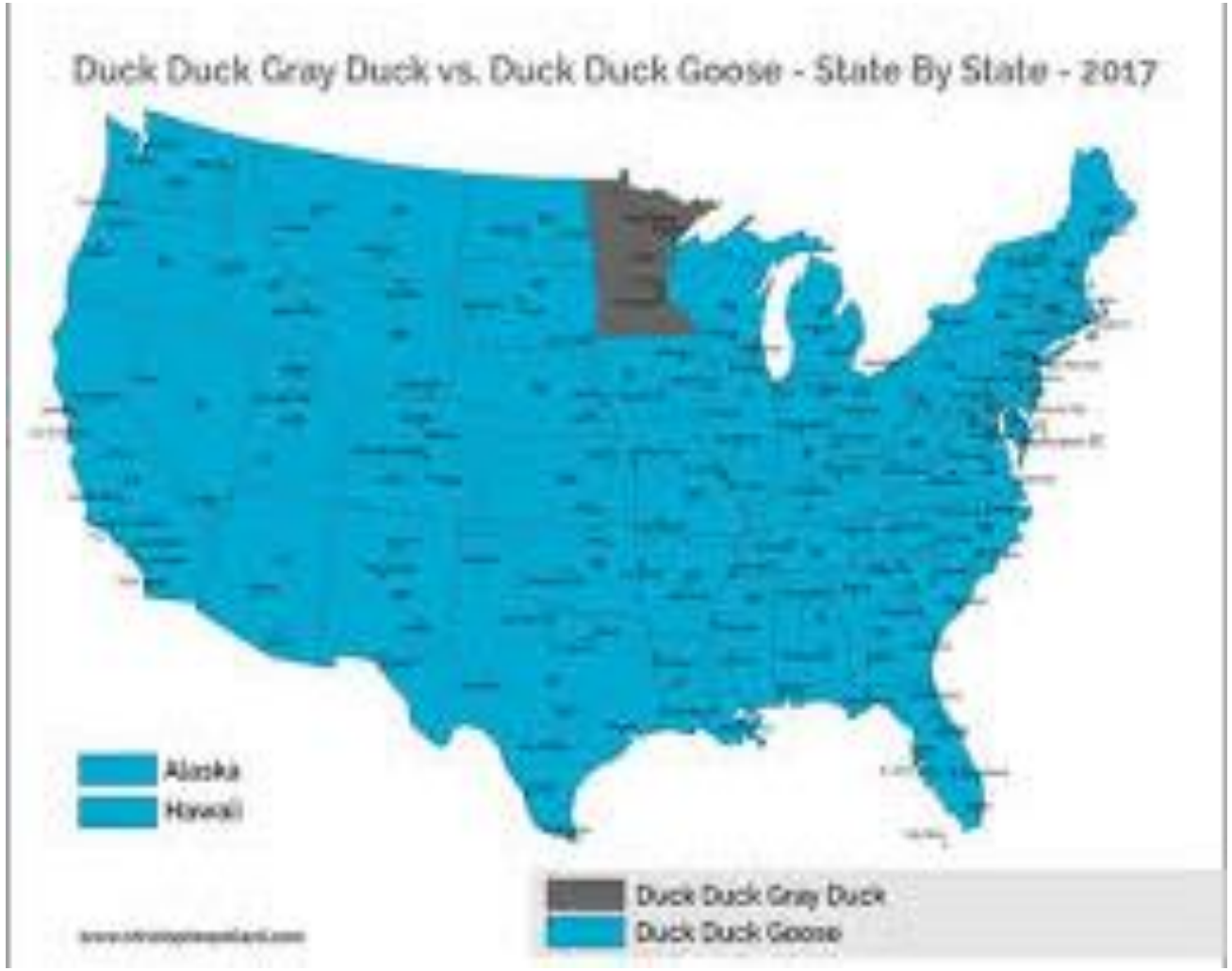


Menu



When and What to Index?

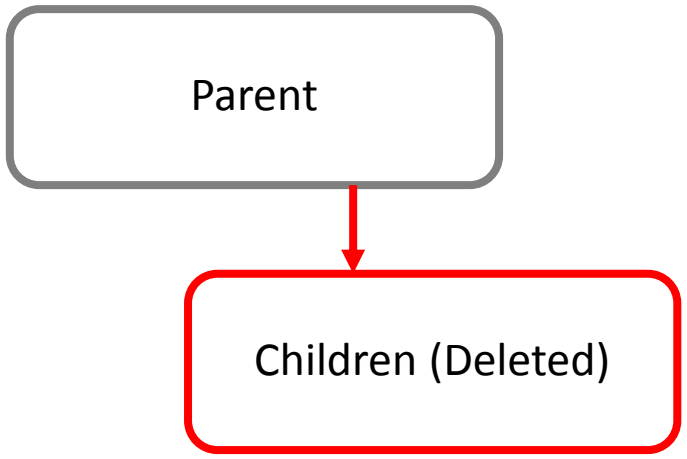
- Better be Unique
- When in doubt, leave it out
- Used in ROQL query?
- Used In report filters?
- Composite for Objects only



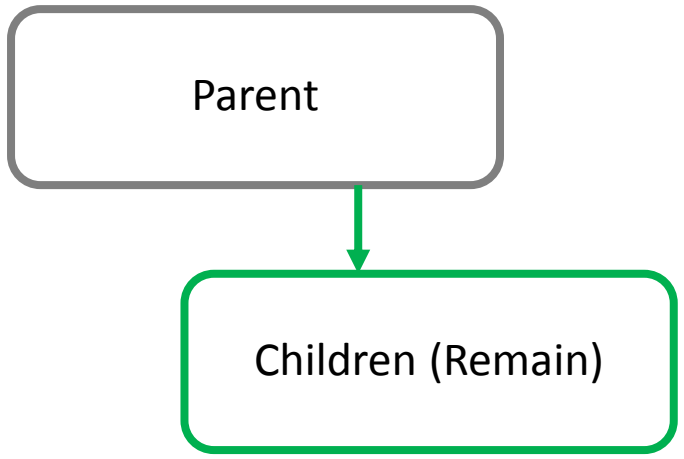
Relationship Types

When does this matter?

Aggregation



Association



Relationships

One-to-Many

Children of Answer Object (1) Add

Type	Child Object
Association	CCStats.AQIReview

Many-to-One

Parents of Incident Object (3) Add

Main	Type	Parent Object
	Association	OracleServiceCloud.Contact

Many-to-Many

Parents of Inc2QA Object (3) Add

Main	Type	Parent Object
◉	Association	CC.QAIncidentInfo
◉	Aggregation	OracleServiceCloud.Incident

Have one intermediate table with a relationship to two other tables!

Demo

Q&A

Chat and Phone Lines

- Send your chats to ALL PANELISTS
- Lines are muted. Press #6 to unmute.
- Recommend unmuting and then muting via your device or desk phone

Have a Question? Ask the Experts!

Troubleshooting Wizardry

Thursday, Feb. 8 @ 11 a.m. EST

Register at: http://bit.ly/OSVCexperts

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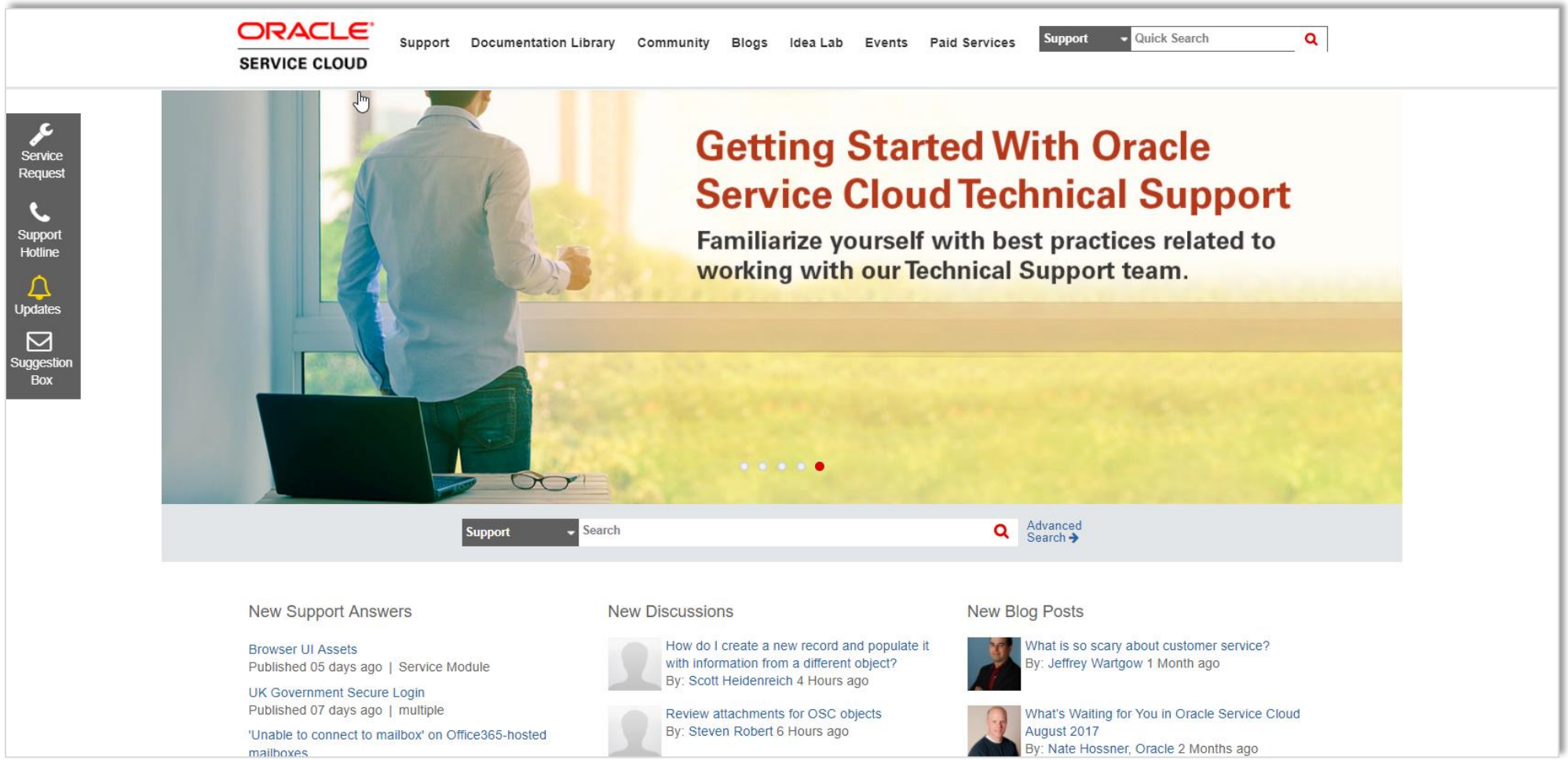

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