

Welcome to Oracle Service Cloud

Ask the Experts

Extending Data Into Your Site

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Lines have automatically been muted. **#6 to unmute**

Ignore the attendee ID that appears in the pop up once logging into WebEx.

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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

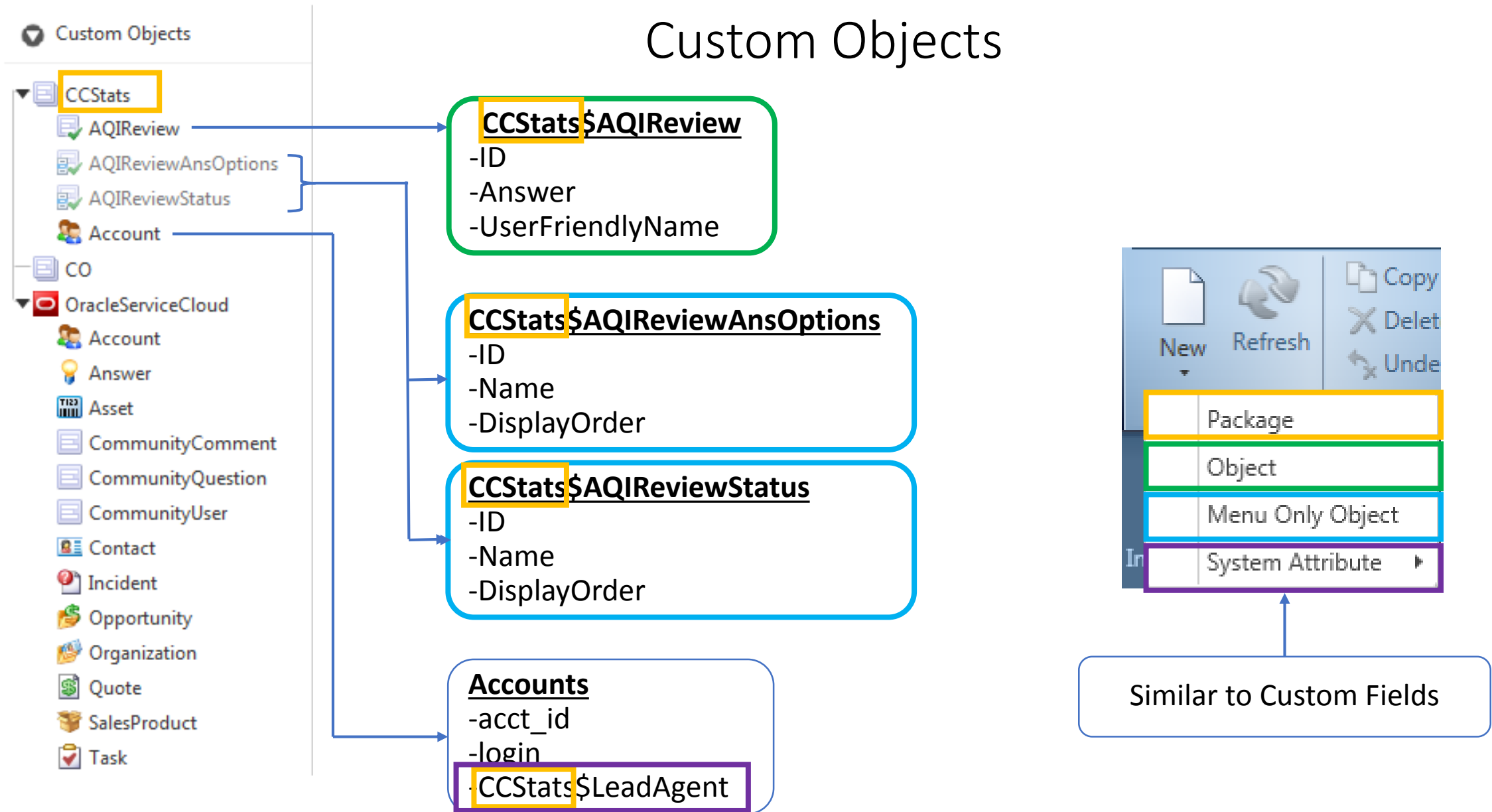
- Custom Fields and Custom Objects
- Data Types
- Considerations for Indexing
- Relationships
- Best Practices, Gotchas, Impacts, and Considerations
- Demo
- Questions

Custom Fields - Extend existing predefined tables

The screenshot shows a software interface with a sidebar on the left and a main table on the right. The sidebar, titled 'Custom Fields', lists several predefined tables: Staff Account, Contact, Incident, Organization, Answer, Opportunity, Quote, Sales Products, and Task. A blue bracket groups these tables under the label 'Predefined tables'. The main table displays data for an 'Incident' record. It has seven columns: 'ref_no', 'subject', 'other standard', 'c\$alternateemail', 'c\$esc', 'c\$esc_note', and 'other CFs'. The first three columns are grouped under the label 'Standard Fields', and the last four are grouped under 'Custom Fields'. The data row shows '180116-000000' for ref_no, 'LD test incident 1' for subject, an empty cell for other standard, 'some1.dude1@junk.inv' for c\$alternateemail, '1' for c\$esc, 'Escalated because....' for c\$esc_note, and an empty cell for other CFs.

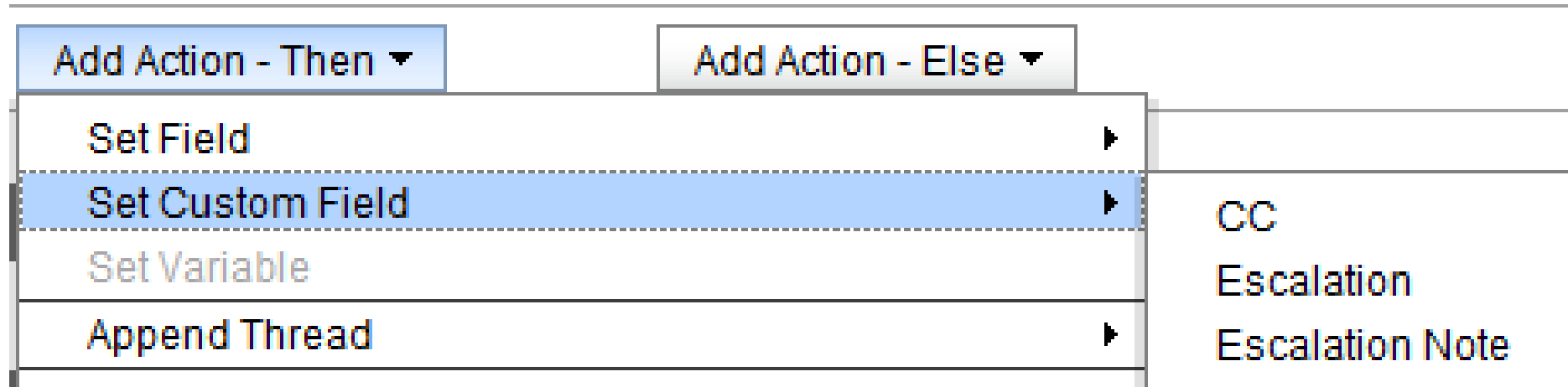
ref_no	subject	other standard	c\$alternateemail	c\$esc	c\$esc_note	other CFs
180116-000000	LD test incident 1		some1.dude1@junk.inv	1	Escalated because....	

Custom Objects




Custom Fields vs. Custom Attributes - Rules


- Custom Fields only are available in business rules





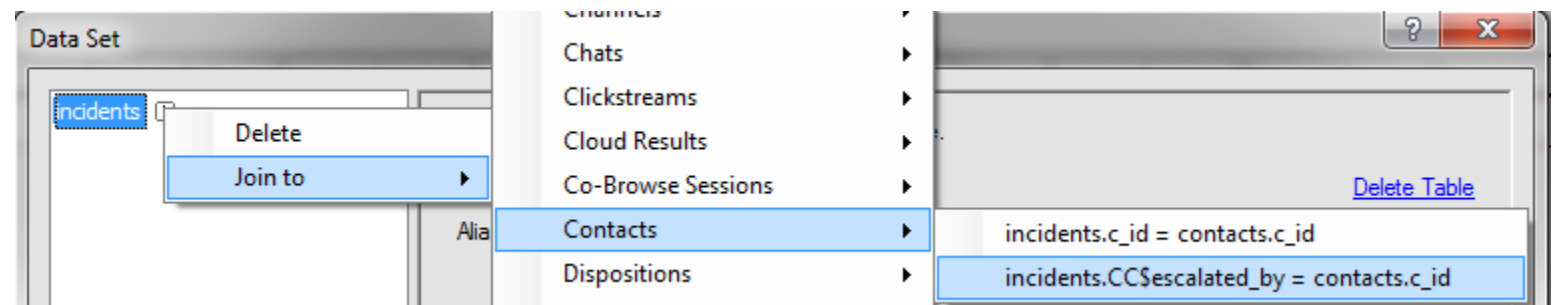
Custom Fields vs Custom Attributes - Relationships

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

 Object Relationships - Edit
(Status: Deployed)

Parents of Incident Object (1)  Add

Main	Type	Parent Object	Parent Field	Child Field	Edit Relationship	Delete
	Association	OracleServiceCloud.Contact	c_id	escalated_by	Edit	



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	<u>i_id</u>
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) CC\$escalated_by

Custom Fields vs. Custom Attributes - Masking

- Both have masking, but it varies.

- Advantage Custom Attributes for utilizing regex

- Custom Fields

Pattern

Type a regular expression string pattern to define a format that will be used to verify the contents entered in the field. The caret (^) character is automatically added to the start of the pattern and the dollar sign (\$) character is automatically added to the end. This ensures that strings entered in the custom object's field match the entire regular expression.

For example, if you want to create a field to store phone numbers in a format of 123-456-7890, enter a pattern of [0-9]{3}-[0-9]{3}-[0-9]{4}.

This option is available only for plain text and long text 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.

Administration

Organizations

Contacts

Service

 **Incidents** ☒ Select All

☒ Read

☒ Add / Edit

☒ Send Response

☒ Delete

☒ Propose

- Custom Fields have an additional layer of visibility settings

Interface Visibility

Interface	Language	*Label	Hint	Admin		End-user	
				<input checked="" type="checkbox"/> Display	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Display	<input checked="" type="checkbox"/> Edit
Id_webinar	English (US)	CC	List of email addresses that will be CC'd on an incident response	<input checked="" type="checkbox"/> Display	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Display	<input checked="" type="checkbox"/> Edit
Id_webinar_gb	English (UK)	CC	List of email addresses that will be CC'd on an incident response	<input checked="" type="checkbox"/> Display	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Display	<input checked="" type="checkbox"/> Edit

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 →

Generates Menus (Integer) [No Value]

Generates Menus Search

ID Generates Menus Label Search

ID	Generates Menus Label
1	Menu 1
2	Menu 2
3	Menu 3

Menu ↓

Generates Menus (Menu)

Search Text

[No Value]

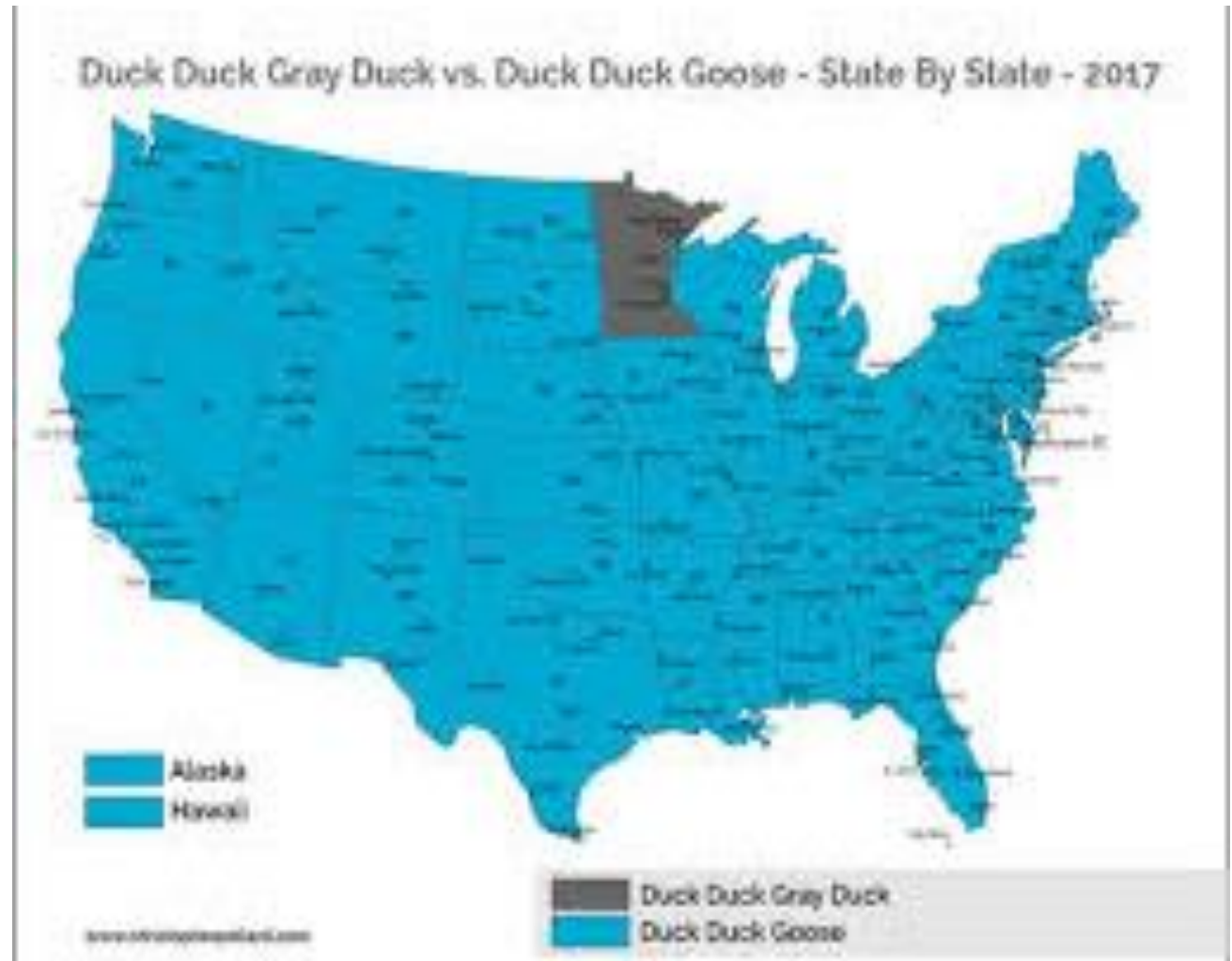
Menu 1

Menu 2

Menu 3

When and What to Index?

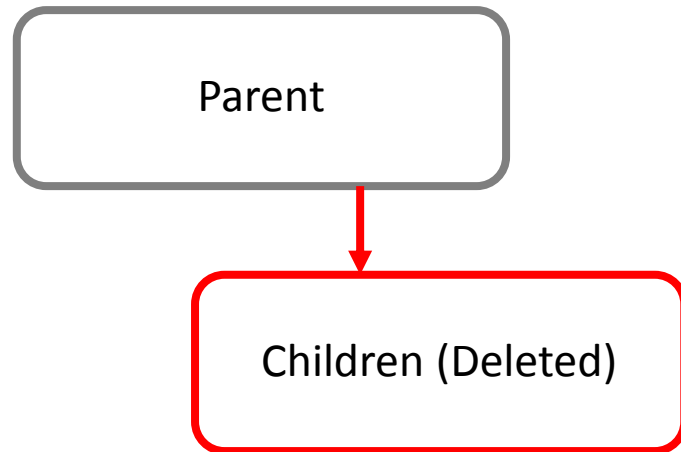
- Better be Unique
- When in doubt, leave it out
- Used in ROQL query?
- Used In report filters?
- Composite for Objects only



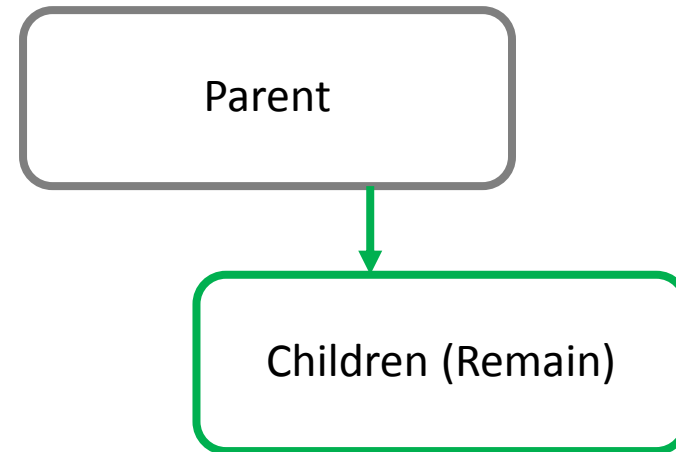
Relationship Types

When does this matter?

Aggregation



Association



Relationships


One-to-Many

Children of Answer Object (1)  Add

Type	Child Object
 Association	CCStats.AQIRewiew





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 i

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!

SAVE
THE DATE

Troubleshooting Wizardry

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

[Register at: http://bit.ly/OSVCexperts](http://bit.ly/OSVCexperts)

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The screenshot displays the Oracle Service Cloud website. At the top, the Oracle logo is followed by the text 'SERVICE CLOUD'. A navigation bar includes links for Support, Documentation Library, Community, Blogs, Idea Lab, Events, and Paid Services. A 'Support' dropdown menu and a 'Quick Search' field with a magnifying glass icon are also present. On the left side, a vertical sidebar contains icons and labels for 'Service Request', 'Support Hotline', 'Updates', and 'Suggestion Box'. The main content area features a large banner with a background image of a person looking out a window. The banner text reads: 'Getting Started With Oracle Service Cloud Technical Support' and 'Familiarize yourself with best practices related to working with our Technical Support team.' Below the banner is a search bar with a 'Support' dropdown, a 'Search' button, and a link to 'Advanced Search'. The bottom section of the page is divided into three columns: 'New Support Answers', 'New Discussions', and 'New Blog Posts'. Each column lists recent content with titles, publication times, and author information.

ORACLE
SERVICE CLOUD

Support Documentation Library Community Blogs Idea Lab Events Paid Services Support Quick Search

Service Request
Support Hotline
Updates
Suggestion Box

Getting Started With Oracle Service Cloud Technical Support

Familiarize yourself with best practices related to working with our Technical Support team.

Support Search Advanced Search

New Support Answers

- Browser UI Assets
Published 05 days ago | Service Module
- UK Government Secure Login
Published 07 days ago | multiple
- 'Unable to connect to mailbox' on Office365-hosted mailboxes

New Discussions

- How do I create a new record and populate it with information from a different object?
By: Scott Heidenreich 4 Hours ago
- Review attachments for OSC objects
By: Steven Robert 6 Hours ago

New Blog Posts

- What is so scary about customer service?
By: Jeffrey Wartgow 1 Month ago
- What's Waiting for You in Oracle Service Cloud August 2017
By: Nate Hossner, Oracle 2 Months ago

Your Feedback

- Once I end the meeting,
 - You will get a notification that the host has ended the meeting.
 - Click OK.
 - A short feedback survey will appear in your browser.

Thank You!

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