ORACLE

CRM ON DEMAND

Product Release Notes

Release 33

October 2016

VERSION 20161021

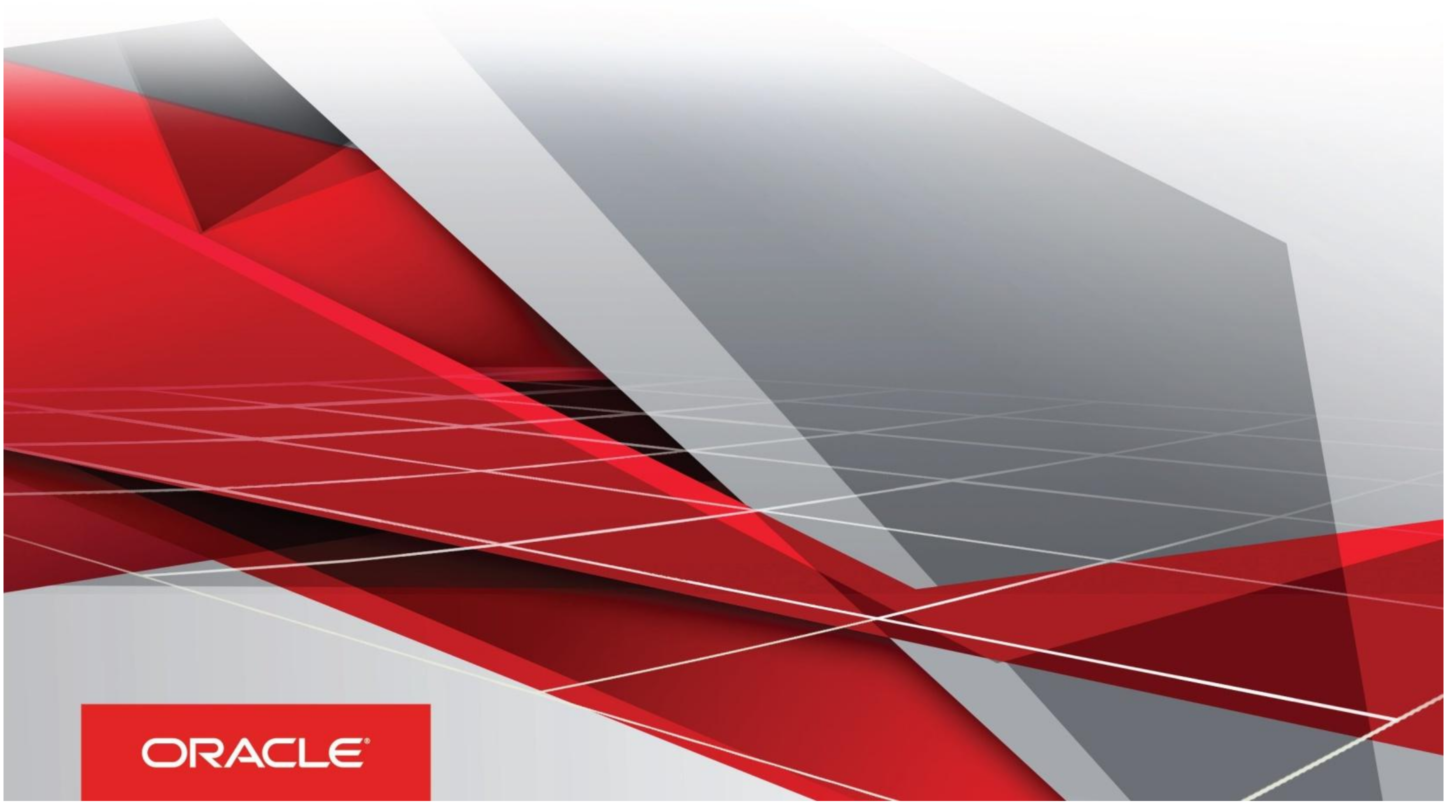

Table of Contents

Document Versioning 2

Overview 3

Known Issues 3

Usability 3

Drag and Drop Column Reordering is not Supported in some Admin List Pages 3

Column Header Freezing is not Supported in some Admin List Pages 3

Customer Impact 3

Analytics 3

Dimension Folder Label Change in Opportunity Team Analytic Subject Areas 3

Usability 3

UI Field Label Change in Opportunity Team 3

Language Support 4

Fixed Issues 5

Documentation 7

Online Help 7

Topic: Lead Conversion Administration 7

Topic: Leads 7

Topic: Converting Leads to Accounts, Contacts, Deal Registrations, and Opportunities 8

Topic: Customizing Static Page Layouts 8

Document Versioning

Date	Version	Change Reference
October 21, 2016	20161021	Final version published
September 16, 2016	20160916	Draft published

Overview

The Oracle CRM On Demand Release 33 Product Release Notes outline the known issues, the customer impacts, and changes to the Oracle CRM On Demand user interface and behavior. The Release Notes also list the defects and behaviors that have been fixed in this release.

To review the features included in this release, see *Oracle CRM On Demand Administrator Preview Guide* for Release 33, which is available at the Oracle CRM On Demand Training and Support Center portal, in the Release Information tab under What's New. In addition, see the Transfer of Information (TOI) recordings, which are available at My Oracle Support.

Known Issues

Usability

Drag and Drop Column Reordering is not Supported in some Admin List Pages

Some of the Admin list pages like Role List, List of Privileges Assigned to Roles, and so on, do not support drag and drop reordering of columns.

Column Header Freezing is not Supported in some Admin List Pages

Some of the Admin list pages like List of Privileges Assigned to Roles do not support the freezing of column headers while scrolling down the list.

Customer Impact

Analytics

Dimension Folder Label Change in Opportunity Team Analytic Subject Areas

The folder label, 'Owned by User', in the Opportunity Team real-time and historical subject areas has been renamed to 'Team Member'.

Usability

UI Field Label Change in Opportunity Team

The UI field label 'Split %' on the Opportunity Team record type has been renamed to 'Percentage Split'.

Language Support

The following table outlines the supported languages for Oracle CRM On Demand and its related applications:

	Chinese Simplified	Chinese Traditional	Danish	Dutch	English-American	English-British	Finnish	French	German	Italian	Japanese	Korean	Norwegian	Polish	Portuguese	Portuguese – Brazilian	Russian	Spanish	Swedish	Thai	Turkish
Oracle CRM On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oracle CRM On Demand Desktop	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oracle Contact On Demand					✓																
Oracle Email Marketing On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	
Oracle CRM On Demand Connected Mobile Sales for iPhone and Android*	✓		✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		✓	
Oracle CRM On Demand Connected Mobile Sales for BlackBerry					✓			✓	✓									✓			
Oracle Offline On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓		✓	✓	✓	✓	
Oracle Notes Email Integration On Demand					✓																
Oracle Outlook Email Integration On Demand					✓																

† Oracle CRM On Demand Desktop Version 4.1 only supports English-American. For information on supported languages for Oracle CRM On Demand Desktop Version 4.2, refer to *Oracle CRM On Demand Desktop Product Release Notes* for Version 4.2.

* For information on supported languages for Oracle CRM On Demand Connected Mobile Sales, refer to *Oracle CRM On Demand Connected Mobile Sales Product Release Notes*.

Fixed Issues

The following defects have been fixed in Oracle CRM On Demand Release 33.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
24389303	Analytics	# of Records metric is not shown in report when Opportunity Name, Custom NUM_60 to Custom NUM_62 are included in the report.
23633536	Analytics	Opportunity field 'Opportunity Name' with a default expression linked to key contact shows error.
24445445	Analytics	Report with Opportunity Name and Probability % columns shows empty values in real-time report and incorrect value in historical report.
22460728	Analytics	Usage Tracking metric # of Administrators is displayed as 3 for a company with only 1 administrator.
19186421	Analytics	Webpage has expired error on clicking the Cancel button on Dashboard Display Order page.
23266857	CRM	Attachments cannot be removed from the attachment fields in the custom objects.
21675684	CRM	Audit Trail entries are not created when new records with attachments are created in the Custom Objects 01-40.
24408460	CRM	Users are unable to view all the related Custom Object 01 records on parent Custom Object 01 as the Application throws an error when users click Show Full List link in related information section. The issue exists for Custom Objects 02 and 03 as well.
23609133	Customization	Contact Cascading Picklist does not display the correct values in the Related Picklist Available and Displayed Values when choosing a newly created picklist value group.
21037866 23096304	Customization	Custom Related Information Fields on existing records are not initialized with the values from the source fields in the records of the related record type.
23109047	Customization	Exports cannot be completed if the selected record type(s) contain multi select picklists referencing LIC values that no longer exist.
23754272	Customization	When creating Custom Object 01 records as related children of a Custom Object 01 parent record, the system throws the error message ‘The server encountered an unexpected condition which prevented it from fulfilling the request’. The issue also exists for Custom Objects 02-03.
24367223	Data Management	In Content Management → Manage Attachments, Batch Delete of All Attachments list fails with System Error.
23491632	Data Management	The customized layout assigned to your role is not used, when Mass Update is called from the Opportunity Product Revenue list title bar.
24295830	Integration	Changing the Oracle CRM On Demand tenant to connect to Oracle Social Network throws the error message "The server encountered an unexpected error while connecting with Oracle Social Network. Please contact the System Administrator".
20845415	Integration	The Cancel button on Import Request page is enabled even after the import request has completed.
21165070	Integration	This object is inactive or nonexistent. (SBL-DAT-00144) errors are present in the OM and web logs.
23731512	Integration	When user imports Invitee record type, the Application prompts the user to map Event name and Contact name, even when the user selects Row ID or External Unique ID as the

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
		unique record matching method.
22973606	Integration	Login to Outlook Email Integrations failed when password contains accent characters.
23533712	Layout	Accounts records are not accessible if Account Relationship layout(s) uses fields needed only in Account Competitor such as Competitor Account Name that were removed in Release 31.
23561652	Layout	When editing or creating a new Contact Page Layout, the changes cannot be saved unless the system fields Row ID, Created External or Modified External are part of the page layout.
23730937	Search	Search is not working in Multi Association Popup when the Company profile Global Search Method is Keyword search and the search term consists of non-English characters.
23614478	Search	When using Google Chrome, performing filter options in lists or Advanced Search would cause the options to display as blank values.
23724857	UI/Usability	Creating a Contact child record under the Partner record type would not auto-populate the owner field with the user creating the Contact record.
21520332	UI/Usability	Customizing the modern icon for the attachments object, is not seen on the Events detail page.
23567534	UI/Usability	Custom web applets on Contact record displays an error, when user navigates to the Contact from Campaign recipient related information of Campaign object.
22899158	UI/Usability	On Internet Explorer v10/11, the PDF print output that is displayed on Printer Friendly link shows the page being scrambled.
23603891	UI/ Usability	The Edit link on Opportunity Team records does not work.
23114283	UI/Usability	The email notification sent on completion of an Import request, does not have the log and mapping files attached.
22756058	UI/Usability	Using the Mass Create Appointments feature is failing under certain conditions when it should be succeeding.
21871291	UI/Usability	When appointments in calendar are dragged and dropped, the JS API custom buttons in calendar are disappearing.
23583855	UI/Usability	When trying to select a value on Account Territory field to make a filter on the Opportunity list, the application is not keeping the value selected.
22994438	UI/Usability	While copying and saving a service request record, the application throws an error.
23521890	Web Services	Product Insert though web services triggers File Allotment error.
23730177	Web Services	Account Query page web services request returns accounts with invalid parent account row ids.
24331282	Workflow	A book with no users, specified in the expression of a Book Assign action does not get assigned successfully.
23604290	Workflow	Assign Book actions in workflows on Opportunity and Account objects fail with the error message: You are not allowed to set a view mode that is broader than the one specified on the buscomp level for Business Component 'Book Of Business'.(SBL-DAT-00547).
23574758	Workflow	Email Format and Message Body fields from Send Email action page are not aligned properly.

Documentation

Online Help

The following documentation errors or omissions exist in Release 33 and will be corrected in a subsequent update.

Topic: Lead Conversion Administration

The following note appears in this topic:

NOTE: Only the fields that are mapped to fields in the relevant record type are available to be added to the Convert Lead page layout. If a field that you want to add to the Convert Lead page is not already mapped to fields on the relevant record type, then you must map it before you can add it to the layout of the Convert Leads page. The Associated Opportunity field always appears in the Opportunity section of the Convert Lead page, and the Deal Registration Name field always appears in the Deal Registration section. You cannot remove these fields from the page layout.

This note should instead read as follows:

NOTE: Only the fields that are mapped to fields in the relevant record type are available to be added to the Convert Lead page layout. If a field that you want to add to the Convert Lead page is not already mapped to fields on the relevant record type, then you must map it before you can add it to the layout of the Convert Leads page. In addition, concatenated fields and fields of the Web Link field type are not available to be added to a lead conversion layout, even if such fields are mapped to fields on the relevant record type. The Associated Opportunity field and the Next Step field always appear in the Opportunity section of the Convert Lead page, and the Deal Registration Name field and the Principal Partner Account field always appear in the Deal Registration section. You cannot remove these fields from the page layout.

Topic: Leads

In this topic, in the text that describes the options for copying lead teams when converting leads, some information is missing from the following bulleted point:

- **When an existing record is used.** If the evaluator selects the option to link the lead to an existing account or contact instead of creating a new one, then the evaluator must specify the record access level that will be granted to the lead owner in the team on the linked account or contact. All other members of the lead team are given the record access level on the linked record that they have on the lead record, unless they are already members of the team on the linked record, in which case their access level on that record remains unchanged. If any member of the team, including the lead owner, has a team role on the lead, then the user is given the same role on the linked record, unless the user already has a team role on the linked record, in which case the user's role on the linked record remains unchanged.

The following information is missing:

- If the lead owner is already a member of the team on a record that is linked to the lead when the lead is converted, then the lead owner's record access level on the linked record remains unchanged, even if the lead evaluator selects a different record access level during the conversion.

Also in this topic, in the text that describes the options for copying lead teams when converting leads, the following bulleted point contains some inaccurate information:

- **When a new record is created.** If the evaluator selects the option to create a new account, contact, or opportunity, then the owner of the lead becomes the owner of the new record and is given the Owner level of access to the record. Other members of the lead team are given the record access level on the new record that they have on the lead record. If any member of the team, including the lead owner, has a team role on the lead, then the user is given the same role on the new record..

The bulleted point should instead read as follows:

» **When a new record is created.** If the evaluator selects the option to create a new account, contact, or opportunity, then the evaluator must specify the record access level that will be granted to the lead owner in the team on the new record. Other members of the lead team are given the record access level on the new record that they have on the lead record. If any member of the team, including the lead owner, has a team role on the lead, then the user is given the same role on the new record.

Topic: Converting Leads to Accounts, Contacts, Deal Registrations, and Opportunities

In this topic, step 5 of the procedure to convert a lead reads as follows:

5. If you want to copy the lead team to the team on the account, contact, or opportunity, do the following:

 a. Make sure that the Copy Lead Team check box in the appropriate section of the page is selected. For example, if you want to copy the lead team to the new opportunity, then make sure the Copy Lead Team check box in the Opportunity section of the page is selected.

 b. If you selected the Use Existing Account option, and if the Copy Lead Team check box is selected in the Account section of the page, then select the record access level that you want to grant to the lead owner in the account team.

 c. If you selected the Use Existing Contact option, and if the Copy Lead Team check box is selected in the Contact section of the page, then select the record access level that you want to grant to the lead owner in the contact team.

Step 5 of the procedure should instead read as follows:

5. If you want to copy the lead team to the team on the account, contact, or opportunity, then do the following:

 a. Select the Copy Lead Team check box in the appropriate section of the page. For example, if you want to copy the lead team to the new opportunity, then select the Copy Lead Team check box in the Opportunity section of the page.

 b. Choose the record access level that you want to grant to the lead owner in the appropriate section of the page. For example, if you selected the Copy Lead Team check box in the Opportunity section of the page, then in the Lead Owner Record Access in Opportunity Team field, choose the record access level that you want to grant to the lead owner on the new opportunity.

Step 6 of the procedure to convert a lead, which reads as follows, can be ignored:

6. If you do not want to copy the lead team to the team on the account, contact, or opportunity, then deselect the Copy Lead Team check box in the appropriate section of the page. For example, if you do not want to copy the lead team to the new opportunity, then deselect the Copy Lead Team check box in the Opportunity section of the page.

Topic: Customizing Static Page Layouts

The following note appears at the end of this topic:

NOTE: Starting with Release 33, the Activity field can be added to Activity layouts. When you create a new layout for the Activity record type, or edit an existing layout, you must add the Activity field to the page layout if it is not already on the layout, since Activity is a required field.

The GA release of Oracle CRM On Demand for Release 33 has corrected the limitation documented in the statement above. Consequently, it is no longer applicable.

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