



CRM ON DEMAND

Product Release Notes

Release 34

February 2017
VERSION 20170224



Table of Contents

Document Versioning	2
Overview	3
Known Issues	3
Usability	3
Provide Options to Change Default Search Criteria for Lookup Windows	3
Customer Impact	3
Analytics	3
Report Services API with Parameter Passing Option for Filters	3
Usability	4
Changes to the Drill Down Navigation from Asset Related Information Lists	4
Asset Lookup in Service Request Record Type is Mapped to the Title Field	4
Book Selector Displays the Parent Books of a User's Books Only if Company Profile	
Setting Display Parent Book Hierarchy in Book Selector is Turned On	4
Company Profile ITS URL Field Removed	4
Language Support	5
Fixed Issues	6
Documentation	7
Online Help	7
Topic: About Activity Reminders	7
Topic: About Workflow Rule and Workflow Action Failures	7
Topic: Configuring Email Delivery Using Oracle Eloqua Engage	9
Topic: Creating Workflow Actions: Create Task	10



Document Versioning

Date	Version	Change Reference
February 24, 2017	20170224	Final version published
January 31, 2017	20170131	Draft Published

Overview

The Oracle CRM On Demand Release 34 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 34, which is available at:

<http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html>

Known Issues

Usability

Provide Options to Change Default Search Criteria for Lookup Windows

The User lookup window in Public Sharing Groups page is not a regular lookup field, and hence the default search criteria of this lookup is not configurable through User Search Layout.

Customer Impact

Analytics

Report Services API with Parameter Passing Option for Filters

In Release 34, Oracle CRM On Demand has added parameter passing in the Report Services API. Parameter passing allows users to pass report filters as parameters while calling the Report Service API for offline scheduling and downloading of Oracle CRM On Demand Analytics reports.

In the ReportExecute method of the Report Services API, a new parameter '&Action=Filter' has been added, followed by the following parameters, up to 6 parameters in sets of P4-P6, P7-P9, P10-P12, P13-P15 and P16-P18:

- » &P0 parameter indicating number of parameters being used in the call,
- » &P1 parameter indicating the Operator,
- » &P2 indicating the name of the column,
- » &P3 indicating the value of the column,
- » and so on.

You can invoke the Report Service API from a command line tool such as wget. The Report Services API runs the specified report and delivers the report output after applying the report filters specified in the API call. Other parameters, output formats, allocations, and so on remain unchanged for the Report Services API.

NOTE: While invoking the Report Services API with filters and selecting the format for download as a PDF file, change the 'Rows per Page' option in the Report Table view properties to the required number of rows to get all records for a report; otherwise only 25 records are downloaded by default.

Usability

Changes to the Drill Down Navigation from Asset Related Information Lists

You can drill down from the Product field in the following lists to navigate to the Product Detail page:

- Account Asset child list,
- Account Asset full list,
- Contact Asset child list,
- Contact Asset full list and
- Asset full list.

Use the drill down on the Serial# field to navigate to the Asset Detail page. Use the drill down on the newly introduced Title field to also navigate to the Asset Detail page.

You can optionally add the Title field to the Asset Related Information layouts to drill down to the Asset Detail page, in case the asset Serial# field is a non-mandatory field for the company.

Asset Lookup in Service Request Record Type is Mapped to the Title Field

An asset's Title field displays the Serial# of the asset if the serial number information is present. If not, then the Title field displays the product name of the asset. For the Service Request record type, the mapping of the Asset lookup is changed to the Title field, instead of Serial#.

Book Selector Displays the Parent Books of a User's Books Only if Company Profile Setting Display Parent Book Hierarchy in Book Selector is Turned On

Prior to Release 34, the book selector in Oracle CRM On Demand used to display the entire book hierarchy, including the books to which the user did not have access. From Release 34 onwards, users can see the parent books of the user's books only if the company level setting Display Parent Book Hierarchy in Book Selector is selected.

Company Profile ITS URL Field Removed

The ITS URL field has been removed from the Company Profile page in Release 34. This value is now managed by Oracle.

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 34.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
24412976	Analytics	# of Records field is dropped in report when Opportunity Name, NUM_40 to NUM_54 and INT_30 to INT_34 are included in report.
24949660	Analytics	Account Partner custom fields are labeled wrongly leading to wrong data being shown in reports.
16754245	Analytics	Double byte characters downloaded in .txt format show as garbled characters.
16752098	Analytics	Mouse over Analytics page buttons shows garbled characters for double byte languages.
24733181	Analytics	Records dropped when ZPICK_19 field of Custom Object 15 from Advanced Custom Objects is added to a report.
24741489	Analytics	Reports are not showing results and are timing out after upgrade to Release 32.
25083092	Analytics	Reports with Opportunity ID, Account ID and fields from Account Relationship show extra rows from Account.
24740437	Analytics	Wrong session variable is used internally for English (South Africa) locale.
24795011	Customization	If a concatenated field involves custom fields that are marked as required and the concatenated field gets added to the layout, when Administrators try to remove from the layout the custom fields that are involved in the concatenated field, they encounter an error.
23859532	Customization	If a concatenated field involves custom fields that are marked as required, the concatenated field does not get displayed as required in the Edit form.
25118797	Customization	In a concatenated field containing two picklists, when a cascading picklist is defined for the picklists involved in the concatenated field, if the parent picklist is marked as read-only in the layout definition, the related picklist does not restrict its values according to the cascading list definition.
24303023	Customization	Java Script APIs don't work if tooltips are associated to certain fields.
23859596	Customization	When users edit inline a concatenated field that does not contain a layout required field and the required field is not populated, they navigate to edit form but the value inline-edited in the concatenated field is not preserved.
25023509	Data Management	Audit Items do not get purged.
25225085	Data Management	Mod Tracking records do not get purged after 30 days.
25098345	Integration	"Internal server error" messages get reported randomly when REST API calls are made to create custom objects.
24576833	Integration	While exporting Contact Team records, modified on or after a specified date, there is an inconsistency in the data exported via Data Export Assistant (UI) and Web services.
24827294	Layout	Short lists in List Access & Order do not show all the lists available in all the languages. Only the lists for the Admin language are shown. Also, any new lists that get created in any language reset all the previous assignments.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
24947083	Search	After performing Action Bar search of Accounts, certain picklist fields do not allow the user to nullify the search field values if users want to perform another search.
25036283	Search	When adding an asset to a contact or associating an asset with a service request, the list of records displayed when searching for an asset using "Search for an Asset" popup do not correspond to the search criteria.
24944220	Security	When exporting field values that start with @, the export did not prefix the value with a single quote.
24607014	UI/Usability	Conditionally required validation for Lead fields does not work in edit mode.
24600092	UI/Usability	If the number of lists added to favorites has reached the maximum limit of 100 and the user adds another list to favorites, an error is thrown.
24828731	UI/Usability	Incomplete restore can lead to inability to merge records since the duplicate record is already found in Deleted Items.
16071447	UI/Usability	The Help Page Title contains unknown characters for few non ENU users.
11885091	UI/Usability	The Welcome message i.e. "Welcome <First Name>" is too friendly for Japanese users.
25261357	UI/Usability	Users who do not have the privilege 'All fields in Search and Lists', are unable to rearrange fields in lists using drag and drop, if the fields are unavailable in the detail page layout.
24964118	UI/Usability	When the description of Company Alert message is very long, the OK button on the pop-up alert displayed on login, is not visible, thus making it impossible to dismiss the alert.
25346227	Web Services	Password Reset Emails have HTML tags when the language is set to Portuguese.

Documentation

Online Help

The following documentation errors or omissions exist in Release 34 and will be corrected in a subsequent update.

Topic: About Activity Reminders

The following note is missing from this topic:

NOTE: If the Delegated By field is populated on an activity, and if a reminder is configured for the activity, then the reminders are sent to the user specified in the Delegated By field, as well as to the activity owner and the other users on the activity. If you create an activity for another user, or if the Delegated By field on an existing activity is blank when you assign the activity to another owner, then your name automatically appears in the Delegated By field after you save the activity. If you do not want to receive the reminders for that activity, then you must delete your name from the Delegated By field.

Topic: About Workflow Rule and Workflow Action Failures

In the table that describes the outcome for errors that occur in pre-event workflow rules and workflow actions, the information for the case where a semantic error is detected in a workflow rule condition is incorrect. The information

currently reads as follows:

Type of Error	Outcome	What is Shown in the Workflow Error Monitor
Semantic error in a workflow rule condition	<ul style="list-style-type: none"> None of the actions on the workflow rule are performed. The error is reported back to the user whose action triggered the workflow rule. If the workflow rule was triggered by a Web service, then the failure of the workflow action is reported in the response to the Web service. The operation that triggered the rule is blocked. 	Not applicable

The correct information is as follows:

Type of Error	Outcome	What is Shown in the Workflow Error Monitor
Semantic error in a workflow rule condition	<ul style="list-style-type: none"> None of the actions on the workflow rule are performed. The failure is reported in the Workflow Error Monitor. If the rule was triggered by a delete operation, then the record is deleted. If the rule was triggered by an update operation, then the updated record is saved, unless the Cancel Save check box is selected on the workflow rule. <p>If the Cancel Save check box is selected on the workflow rule, then the update operation that triggered the workflow rule is canceled in the same way that an update operation is canceled if the condition on the rule is not met. For details of what happens when an update operation is canceled by the workflow Cancel Save functionality, see Canceling Workflow Save Operations.</p>	Details of the workflow rule on which the error was found, along with details of the error.

In the same table, some information is missing from the first bulleted point for the case where a semantic error is detected in a workflow action. The information currently reads as follows:

Type of Error	Outcome	What is Shown in the Workflow Error Monitor
---------------	---------	---

Type of Error	Outcome	What is Shown in the Workflow Error Monitor
Semantic error in a workflow action	<ul style="list-style-type: none"> ■ If any of the actions on the workflow rule were already performed, then those actions are rolled back. Any remaining actions on the workflow rule are not performed. ■ The error is reported back to the user whose action triggered the workflow rule. If the workflow rule was triggered by a Web service, then the failure of the workflow action is reported in the response to the Web service. ■ The operation that triggered the rule is blocked. 	Not applicable

The correct information is as follows:

Type of Error	Outcome	What is Shown in the Workflow Error Monitor
Semantic error in a workflow action	<ul style="list-style-type: none"> ■ If any Update Values actions or Create Integration Event actions on the workflow rule were already performed, then those actions are rolled back. Any remaining actions on the workflow rule are not performed. <p>NOTE: If any Create Task actions or Send Email actions were already performed, then those actions are not rolled back.</p> <ul style="list-style-type: none"> ■ The error is reported back to the user whose action triggered the workflow rule. If the workflow rule was triggered by a Web service, then the failure of the workflow action is reported in the response to the Web service. ■ The operation that triggered the rule is blocked. 	Not applicable

Topic: Configuring Email Delivery Using Oracle Eloqua Engage

In this topic, the following note contains some inaccurate information:

NOTE: If your role does not include the Oracle Eloqua Marketing Cloud Service Integration privilege, then Oracle CRM On Demand displays a page that highlights the benefits and features of the integration with Oracle Eloqua



Marketing Cloud Service, rather than displaying the Oracle Eloqua Marketing Cloud Service Administration page.

The note should instead read as follows:

NOTE: If your role does not include the Manage Oracle Eloqua Marketing Cloud Service Integration privilege, then the Oracle Eloqua Marketing Cloud Service link is not available on the Admin Homepage.

Topic: Creating Workflow Actions: Create Task

The following note is missing from this topic:

In this topic, the sentence shown in italics in the following paragraph is incorrect:

NOTE: For a Create Task action to succeed, the user whose actions trigger the workflow rule must have the appropriate access rights to create a task. *In addition, if a Create Task workflow action is configured to create a task for an inactive user, then the workflow action fails.* For information about what happens when a workflow action fails, see About Workflow Rule and Workflow Action Failures.

A Create Task workflow action does not fail as a result of being configured to create a task for an inactive user.

Therefore, the note should instead read as follows:

NOTE: For a Create Task action to succeed, the user whose actions trigger the workflow rule must have the appropriate access rights to create a task. For information about what happens when a workflow action fails, see About Workflow Rule and Workflow Action Failures.



Oracle Corporation, World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065, USA

Worldwide Inquiries
Phone: +1.650.506.7000
Fax: +1.650.506.7200

CONNECT WITH US



Integrated Cloud Applications & Platform Services

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. 0224



Oracle is committed to developing practices and products that help protect the environment