

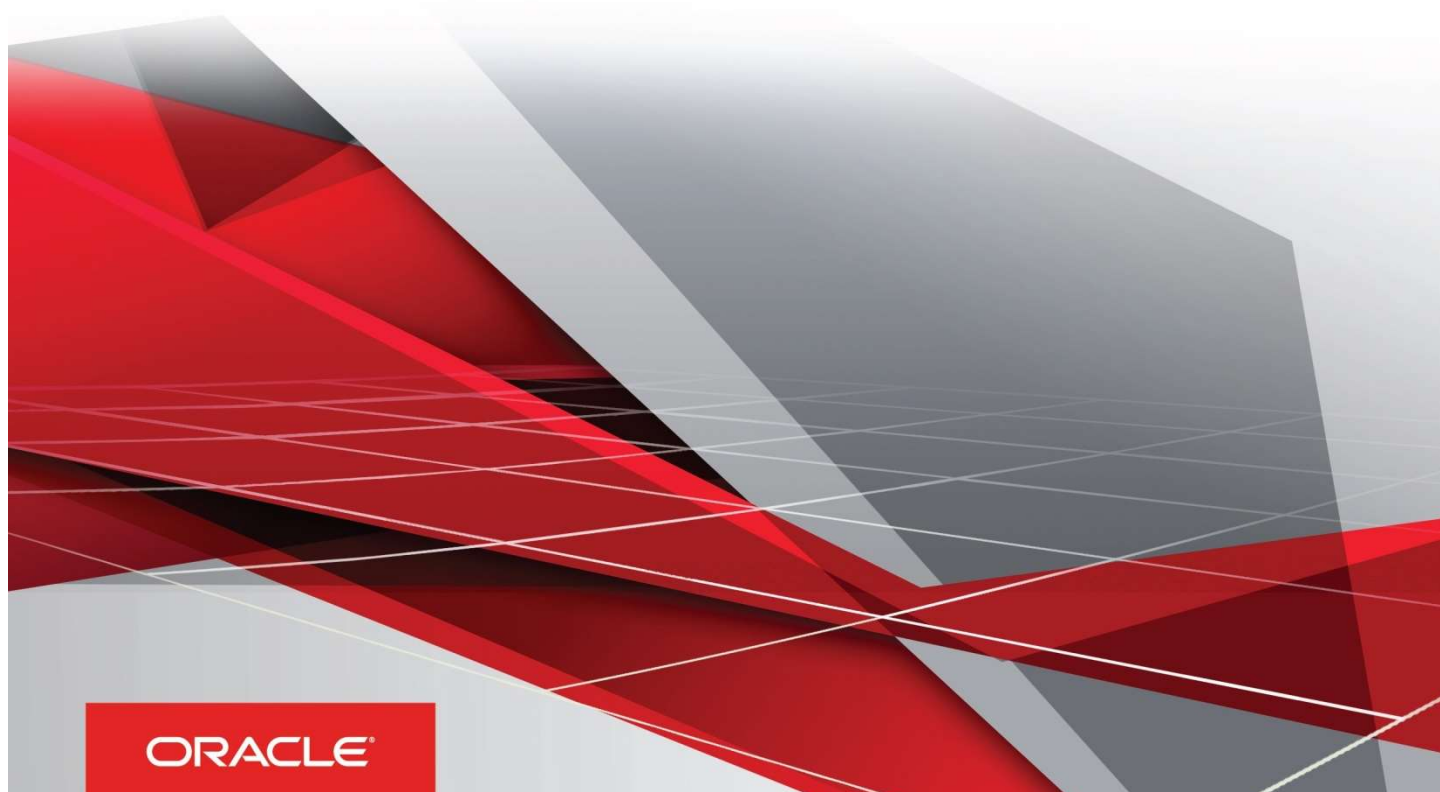
ORACLE[®]

CRM ON DEMAND

Administrator Preview Guide

Release 37

September 2018
VERSION 20180925



ORACLE[®]

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Document Versioning

Date	Version	Change Reference
September 25, 2018	20180925	Removed the Analytics feature "Include Custom Objects 01, 02 and Opportunity of M-to-M Relationship in Historical Subject Area" as this feature is deferred.
August 31, 2018	20180831	Final version published
July 23, 2018	20180723	Draft published

Summary of Release Features

To review the features included in this release, see the Transfer of Information (TOI) recordings available in the [Release Documentation](#).

The following table summarizes the actions required by Oracle Customer Care, your company administrator, or the user, to set up or enable the features in this release. This list assumes that users have access to the referenced product area prior to the upgrade. For example, information about analytics or industry-related features assumes that analytics or the specific industry solution is already provisioned and enabled. If this is not the case, then you might be required to ask your company administrator or Oracle Customer Care to enable the feature.

Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
Administration				
Additional Support for Modification Tracking				✓
Support Audit Trail for Additional Record Types		✓		
Analytics				
Ability to Report on Books				✓
Add Geocoding Fields in Analytics				✓
Allow for Report Trending by Enabling Briefing Books				✓
Coverage for Optimized Custom Fields on CO10-CO25 in Analytics				✓
Create Lead Team Subject Area in Real-time Analytics				✓
Enable Reporting of Week Level User Adoption Metrics in Analytics				✓
Expose Additional Standard Parent Opportunity Fields in Opportunity Related Subject Areas				✓
Expose Star-Rating and Stop-Light Fields in Analytics				✓
Increase Number Of Records That Can Be Downloaded From V3 Analytics				✓
Map Missing Indexed Currency, Revenue Fields and Phone Fields in Opportunity Dimension in Historical Analytics subject areas				✓
Provide the Ability to Copy Analytics Objects from One Environment to Another				✓
Provision for Disabling V2 Analytics				✓
Support the Reporting of Custom Objects 31-40 in Analytics				✓
User Audit Trail Reporting				✓
Application Customization				
Enhance Invitee to Support Custom Related Information Fields		✓		

Connected Mobile Sales

Update CMS Client to Support Continuous Scrolling on List Pages		✓	✓	
Update Display of Address Fields on Detail Pages				✓
Update Options when Error Message is Displayed			✓	

Integration

Ability to Opt out of Attachments Virus Scan during Export				✓
Picklist Export to Include Enabled / Disabled Indicator				✓
Restrict Number of Records to be Downloaded via Lists, by Role		✓		

Usability

Ability to Add Multiple Campaign Recipient Records at a Time				✓
Ability to Save and Add Another Attachment on the Attachments Page				✓
Support Today, Timestamp and Duration Functions in List				✓

Web Services

Ability to Batch Restore Records that Were Deleted Through Web Services				✓
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Workflows

Enhance Send Email Workflow Action with Reply to Option				✓
Scheduled Workflow				✓

Administration

Additional Support for Modification Tracking

Prior to Release 37, when User, Activity User, Position and Activity were enabled for Modification Tracking, events were tracked when Users were added, updated or removed using the User related information section or the Owner field on an Activity record. In Release 37, dissociate events will also be tracked when user is deleted from the User related information section of an Activity record or when the user is no longer the Owner of an Activity record.

STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Support Audit Trail for Additional Record Types

In Release 37, Oracle CRM On Demand extended the audit trail functionality to the following record types:

- Accreditation
- Asset
- Blocked Product
- Broker Profile
- Campaign
- Certification
- Claim
- Contact State License
- Course
- Coverage
- Damage
- Dealer
- Exam
- Financial Account
- Financial account Holder
- Financial Account Holding
- Financial Plan
- Financial Product

- Financial Transaction
- Inventory Period
- Messaging Plan Item
- Plan Account
- Policy Holder
- Revenue
- Sample Transaction
- Insurance Property
- Involved Party
- Messaging Plan Item Relations
- Plan Contact
- Product Indication
- Sample Disclaimer
- Social Media
- Inventory Audit Report
- Messaging Plan
- Order
- Plan Opportunity
- Quote
- Sample Lot
- Social Profile

STEPS TO ENABLE

1. In the upper-right corner of any page, click Admin.
2. In the Application Customization section, click Application Customization.
3. In the Record Type Setup section, click the <Record Type>.
4. In the Field audit Setup section, click <Record Type> Field Audit Setup.
5. Configure auditing based on your requirements.
6. Save the changes.

TIPS AND CONSIDERATIONS

- » To configure auditing, ensure your role has the Administer Field Audit privilege.
- » To view the actual audit records on the record type's detail page:
- » Ensure the access profile has read-only access to the Audit Trail related information.
- » Expose the Audit Trail related information on the record type's page layout.

Analytics

Ability to Report on Books

Starting with Release 37 in V3 Analytics, you can report on users associated with books and books associated to users by using the new subject area called Books. The Books subject area is a real-time reporting subject area and has a many-to-many relationship type. The subject area is available for users who have the Manage Books privilege in their role. The Books subject area has two dimensions - Book and User - and two metrics available under Book User Metrics - to report on the numbers of books for a user and the number of users for a book.



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

To be able to report using the Books subject area, ensure you have the Manage Books privilege in your role.

Add Geocoding Fields in Analytics

Before Release 37, Oracle CRM On Demand did not expose the Latitude and Longitude fields in Address records. Starting with Release 37, in V3 Analytics, Oracle CRM On Demand has updated the addresses folders to expose these geocoding fields in all historical and real-time subject areas.



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Allow for Report Trending by Enabling Briefing Books

Starting with Release 37, Oracle CRM On Demand has added the ability to work with briefing books in V3 Analytics. A briefing book is a new type of object in V3 Analytics, and is a collection of static and updatable snapshots of individual analyses or dashboard pages that allow data presentations to be organized and shared with users. Users can perform report trending by saving static (non-updatable) snapshots in briefing books, for example, at the end of each month, and compare them with the snapshots saved in the previous months. Users can start creating a briefing book by clicking the “Add to Briefing Book” link on an analysis or in a dashboard page. To edit a briefing book, users click the “Edit” link on a briefing book in the V3 Catalog. A briefing book is available for download in PDF and MHT format.



STEPS TO ENABLE

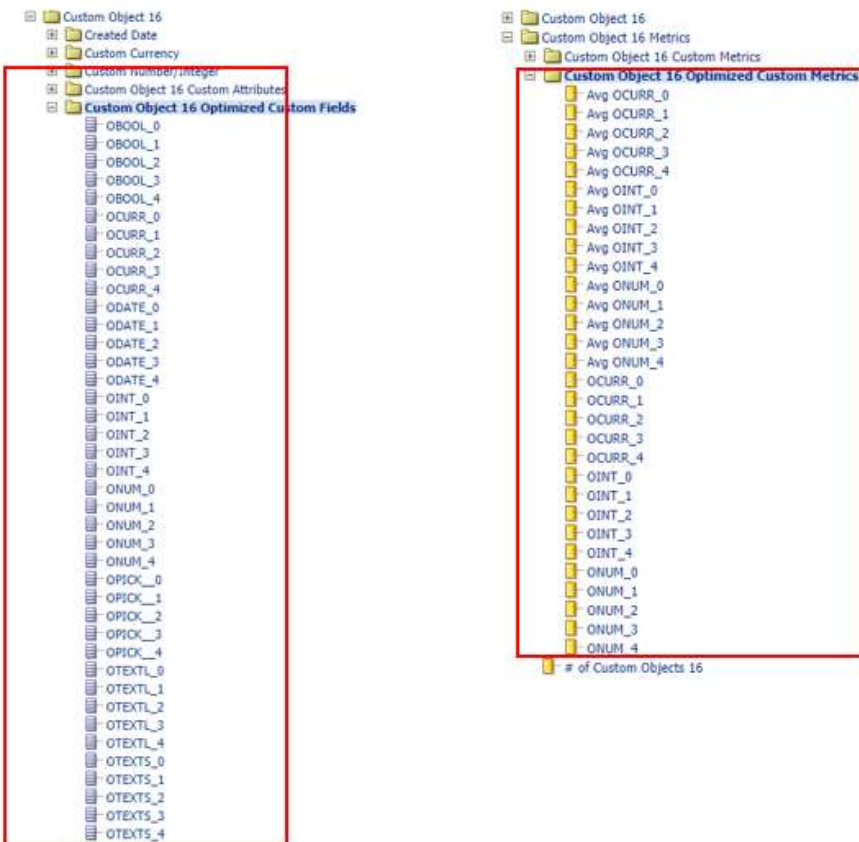
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

- » To download a briefing book, ensure you have the Access V3 Analytics privilege in your role.
- » To download and add to briefing books in My Folders locations in the V3 Catalog, ensure you have the Manage Personal Reports privilege in your role.
- » To download and add to briefing books in My Folders and Shared Folders locations in V3 Catalog, ensure you have the Manage Custom Reports privilege in your role.

Coverage for Optimized Custom Fields on CO10-CO25 in Analytics

Prior to Release 37, Oracle CRM On Demand exposed the optimized custom fields in the Advanced Custom Objects subject area, but only for Custom Object 01 to Custom Object 09 and Custom Object 26 to Custom Object 30. Starting with Release 37 in V3 Analytics, Oracle CRM On Demand exposes the optimized custom fields along with sum and average metrics for numeric fields in the Advanced Custom Objects subject area for Custom Object 10 to Custom Object 25. For each type (checkbox, currency, date, integer, number, picklist, short text and long text) there are up to five optimized custom fields exposed along with the 5 Sum and 5 Average metrics for the optimized custom fields of Number, Integer and Currency type.



STEPS TO ENABLE

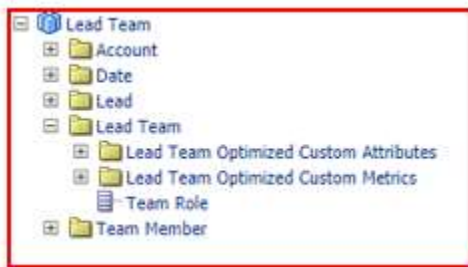
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Create Lead Team Subject Area in Real-time Analytics

Starting with Release 37 in V3 Analytics, Oracle CRM On Demand has added the Lead Team real-time subject area for users to create report on the relationship between leads and lead teams. The users can use this subject area to query for team members involved in a lead, and can report on all the leads they own or where they are part of the lead team. This subject area has a many-to-many relationship and uses the Team Visibility mode regardless of the visibility settings defined in company profile or user profile.



STEPS TO ENABLE

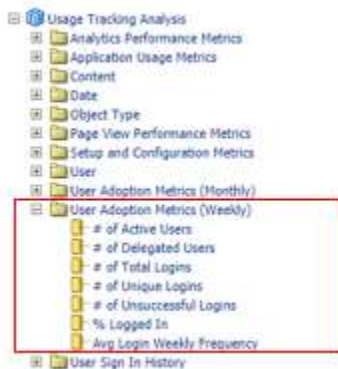
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Enable Reporting of Week Level User Adoption Metrics in Analytics

The User Adoption metrics allow customers to monitor and analyze the user adoption of the Oracle CRM On Demand application. Prior to release 37, the user adoption metrics were available monthly. Starting with release 37 in V3 Analytics, the user adoption metrics are available weekly and monthly.



STEPS TO ENABLE

There are no steps required to enable the feature.

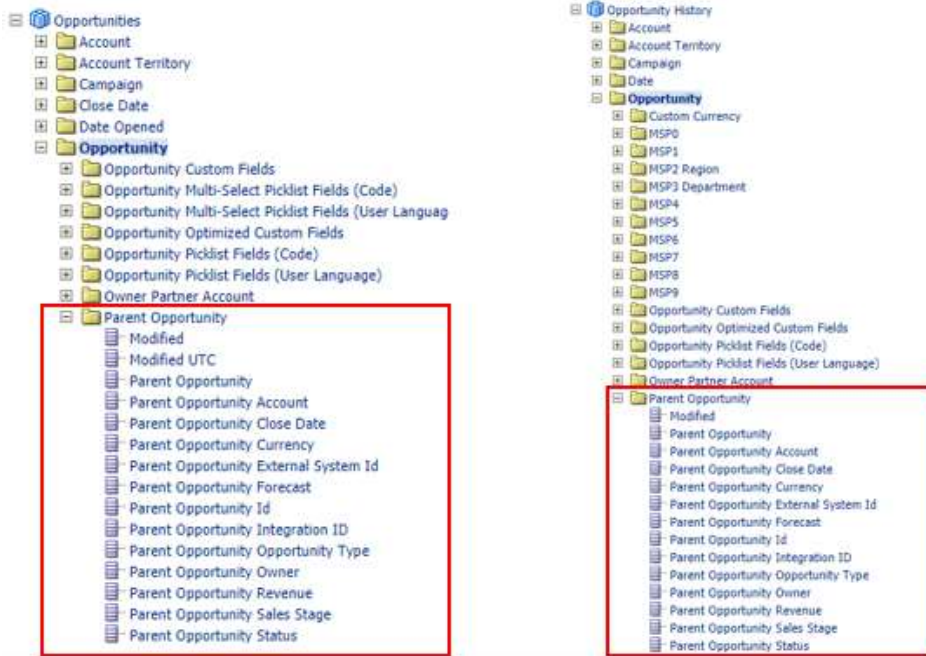
TIPS AND CONSIDERATIONS

None.

Expose Additional Standard Parent Opportunity Fields in Opportunity Related Subject Areas

In Oracle CRM On Demand, users can associate a Parent Opportunity record with an Opportunity record. Before Release 37, Oracle CRM On Demand only exposed the Parent Opportunity and Parent Opportunity External System Id fields in Analytics. Starting with

Release 37 in V3 Analytics, Oracle CRM On Demand has exposed the missing Parent Opportunity fields in the Parent Opportunity folder in all historical and real-time subject areas where Opportunity is exposed as a dimension.



STEPS TO ENABLE

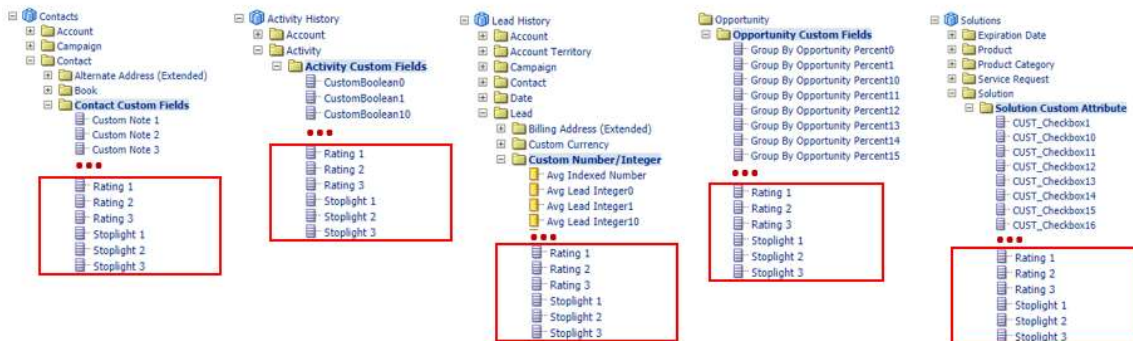
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Expose Star-Rating and Stop-Light Fields in Analytics

Account, Activity, Contact, Lead, Opportunity and Solution objects support three out-of-the-box fields, each of type star-rating and type stoplight. Before Release 37, Oracle CRM On Demand did not expose these integer fields in Analytics. Starting with Release 37 in V3 Analytics, Oracle CRM On Demand has exposed the star-rating and stoplight fields in all historical and real-time subject areas where these above mentioned objects are exposed as dimensions.



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

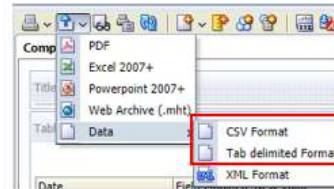
None.

Increase Number of Records that Can Be Downloaded From V3 Analytics

Starting with Release 37 in V3 Analytics, users can fetch a maximum of 700,000 rows and display in table views in analyses - with a maximum of 10,000 rows displayed at a time. Oracle CRM On Demand has increased the limit from 65,000 rows in Release 35 and Release 36. If users attempt to fetch and display more than 700,000 rows, an error message about exceeding the maximum number of records is displayed. When downloading to a CSV file or a tab delimited text file, the maximum number of rows that can be downloaded is also 700,000. For all other download formats (PDF, PPT, XML, and Excel file or MHT (Mime HTML)), the maximum number of rows that can be downloaded is still limited to 65,000.

Account Name	Account Type	Account Type Code	Region	Closed Revenue	State	Status	Web Site	Zip
Cattington Equipment	Customer	Customer	Central	214,500.00 USD	OK	Active	www.CattingtonEquipment-od.com	74112
Chanson Company	Customer	Customer	East	39,000.00 USD	PA	Active	www.ChansonCompany-od.com	15235
Coast Company	Customer	Customer	Central	229,500.00 USD	IA	Active	www.CoastCompany-od.com	50319
Coastal Company	Prospect	Prospect	East	0.00 USD	DC	Active	www.CoastalCompany-od.com	20005
Deep Basin Inc.	Customer	Customer	East	173,400.00 USD	OK	Active	www.DeepBasinInc-od.com	30318

Maximum 700,000 rows displayed in an analysis



Maximum 700,000 rows available for download in CSV or Tab delimited

STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Map Missing Indexed Currency, Revenue Fields and Phone Fields in Opportunity Dimension in Historical Analytics subject areas

Before Release 37, Oracle CRM On Demand did not expose the Indexed Currency, Closed Revenue, Expected Revenue, Revenue and Phone 10 to 19 fields in the Opportunity folder in Historical Analytics subject areas. Starting with Release 37 in V3 Analytics, Oracle CRM On Demand exposes these missing fields in all historical analytics subject areas that contain the Opportunity folder.



STEPS TO ENABLE

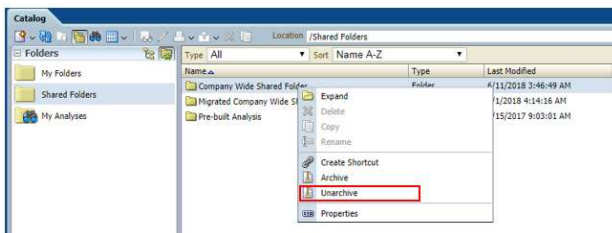
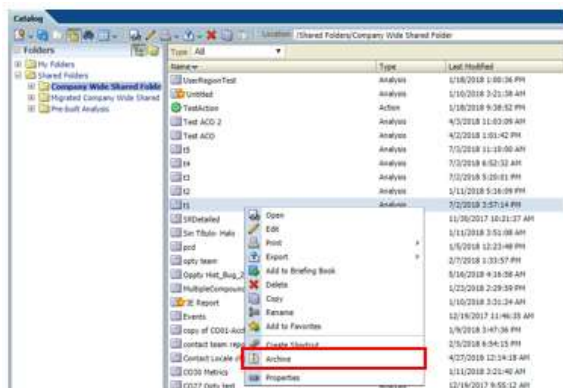
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Provide the Ability to Copy Analytics Objects from One Environment to Another

Starting with Release 37 in V3 Analytics, users have the ability to copy analytics objects between two pods - for example from Staging to Production environment - by using archiving and unarchiving operations. Archiving enables users to bundle folders, or analytics objects as a .catalog file. Unarchiving enables users to upload the .catalog file to unarchive the data to another location in the catalog or to a different pod. The assigned folder's visibility and the access type on these folders drive the ability to unarchive analytics folders or objects in these folders. For example, users who have the Change/Delete type of access on a specific folder can unarchive in the specific folder. If the folders are public where no visibility is assigned, users are able to unarchive if the users also Manage Custom Reports privilege.



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

- » To be able to unarchive in a folder that has visibility assigned, ensure you have the Change/Delete type of access on that folder
- » To be able to unarchive in a public folder, ensure you have the Manage Custom Reports privilege in your role

Support the Reporting of Custom Objects 31-40 in Analytics

Starting with Release 37, Oracle CRM On Demand exposes the custom objects 31 to 40 and their associated metrics to the Advanced Custom Objects subject area in V3 Analytics.



STEPS TO ENABLE

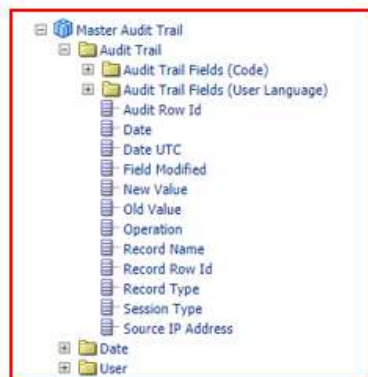
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

User Audit Trail Reporting

Starting with Release 37 in V3 Analytics, users can report on audit trail data for the auditable records types and their fields using the new real-time subject area Master Audit Trail. This subject area does not support reporting on the changes that administrators make to field setup, roles, books, access profiles, REST integration tag names, and previous owner customization. The Master Audit Trail subject area is available for users who have the Access Master Audit Trail and Admin Configuration Audit privilege and the subject area type as Simple. This subject area has three dimensions - Audit Trail, Date and User - and no metrics. In Oracle CRM On Demand, the audited data is automatically purged according to the value of the Audit Expiry field, therefore the Master Audit Trail subject area exposes only the data that has not been purged.



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

» To be able to report using the Master Audit Trail subject area, ensure you have the Access Master Audit Trail and Admin Configuration Audit privilege to your role.

V2 Analytics Decommissioned

Starting with Release 37, the V2 Analytics and any related functionality is decommissioned. The Reports and Dashboard tabs are still visible to the users, but Oracle CRM On Demand displays an error message: "The web content cannot be displayed. Please contact your system administrator." Any homepage V2 embedded custom reports, V2 custom reports or dashboards embedded in Web tabs,

Web applets, reports widgets, Web links that navigate to V2 reports or dashboards will also display the same error. With the decommissioning of V2, users are not be able to embed new homepage custom reports from the V2 catalog. Users are able to read, but not update the existing V2 custom reports defined on the homepage. Users are not able to create report widgets using V2 catalog. Any Report Services API calls using V2 catalog will return an error “Your Report Service request failed (Catalog not enabled)”. The Report Folders section that used to be available in the Content Management section is no longer available. In addition, any V2 pre-built analyses embedded in homepage custom reports, custom web applets, web tabs, and report widgets or accessible through web links are replaced by the corresponding V3 pre-built analyses, through automatic redirection.



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Application Customization

Enhance Invitee to Support Custom Related Information Fields

A custom related information field is a field on a given record type that you can use to display the values from a field on a related record type. Prior to Release 37, the custom related information fields were available for the following record types: Account, Contact, Partner, Campaign, Opportunity, Activity, Opportunity Product Revenue, Solution, Lead, User, Service Request, Custom Objects, Account Contact, Household Contact and Contact Portfolio.

Starting in Release 37, users can also create custom related information fields on Invitees record type.

STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

- » Navigate to the Event record type to access the Invitee Field Setup page in Application Customization.
- » When a user saves the custom related information field, the Related Field Initialization process initializes the values of the custom field for all existing records. Users can see the progress of this process on the Related Field Initialization Queue page available from the Admin Homepage.

Connected Mobile Sales

Update CMS Client to Support Continuous Scrolling on List Pages

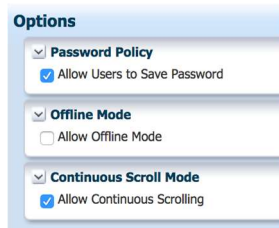
When on list pages, users no longer have to click on Next to see additional records that are part of the list. Instead, as the user scrolls towards the bottom of the displayed list, the client automatically retrieves more records and displays them to the user.

STEPS TO ENABLE

End Users must update the client to 1.4.13.3, when it is available in the Google Play Store or Apple Store.

An Administrator must perform the following steps:

1. Log into Application Composer.
2. Click on the Options link located under the Advanced section.
3. On the Options page, check the box beside Allow Continuous Scrolling.
4. Click Save to save your settings.



TIPS AND CONSIDERATIONS

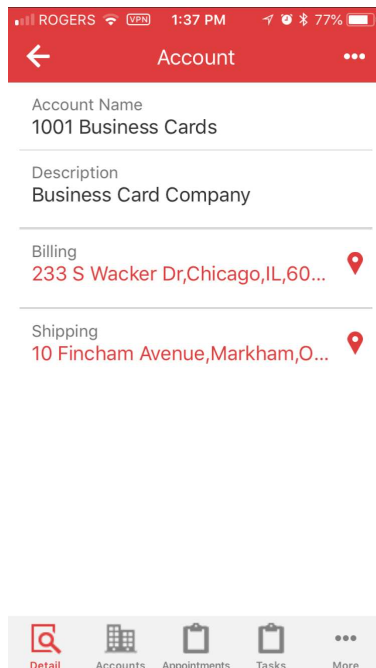
- » Calendar lists do not support this feature.

Update Display of Address Fields on Detail Pages

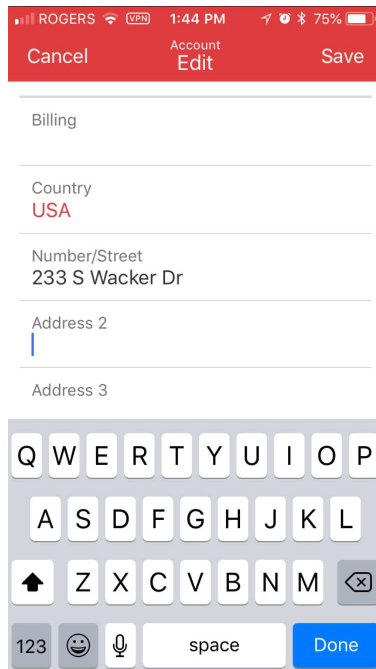
Prior to CMS Server 1.4.25, addresses were using lots of memory, causing users to scroll often to view details that CMS displayed after the address field.

Starting in CMS Server 1.4.25, CMS displays addresses as a comma-delimited field. When viewing the address in Edit mode, each part of the address as a separate field so that you can edit each field separately.

Address displayed on a Detail page:



Address displayed in Edit mode:



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None.

Update Options when Error Message is Displayed

Prior to CMS Client 1.4.13.3, when the CMS application presented either the “Error Loading Content Server Error” or “Error Loading Content. The Internet connection appears to be offline” error message to the user, there were also two buttons displayed- Settings and Ok. When users selected Settings, they were brought back to the login screen. When users selected Ok, nothing would occur, and the error message would remain on the screen.

With the new client, CMS presents Exit and Retry buttons instead of Settings and Ok. The Exit button takes the user to the login screen. The Retry button reattempts the previously failed action.

STEPS TO ENABLE

End Users need to update the CMS client to 1.4.13.3, when available in the Google Play Store or Apple Store.

Integration

Ability to Opt out of Attachments Virus Scan during Export

This feature introduces a checkbox ‘Scan export .zip file for viruses’ in the Data Export Assistant page, which allows users to opt out of the default virus scan performed on the export attachments. When users select this check box, the application scans the ZIP file of attachments for viruses and if the scan detects any virus, then the application does not export the ZIP file. This check box is selected by default. If the user deselects the check box, then the application does not scan the ZIP file of attachments for viruses. It is recommended that the users check the contents of the ZIP file by using scanning software after they download the file.

NOTE: Oracle CRM On Demand scans each attachment for viruses before uploading the attachment, and if Oracle CRM On Demand finds a virus, then it does not upload the file. However, when users attempt to export attachments, a later version of a virus definition in the scanning software might detect a virus, that the software could not detect when users uploaded the attachment. In such scenarios, users can opt not to scan the attachments for virus while exporting, thus allowing users to export the attachment file from Oracle CRM On Demand.

The screenshot shows the 'Data Export Assistant' interface, specifically 'Step 2 of 3: Select time zone, date time format, and time filter'. The interface includes a title bar with 'Data Export Assistant', a 'Back to Import and Export Tools' link, and a 'Help' button. Below the title bar are 'Previous', 'Next', and 'Cancel' buttons. The main content area contains several sections with instructions and input fields:

- Time Zone:** 'Please select the time zone. The exported date time values will be converted to the time zone you select.' The dropdown menu is set to '(GMT-08:00) Pacific Time (US & Canada); Tijuana'.
- Date Time Format:** 'Please select the date time format. The exported date time values will be converted to the format you select.' The dropdown menu is set to 'USA - MM/DD/YYYY hh:mm:ss PM'.
- Field Delimiter:** 'Please select the field delimiter for your export file.' The dropdown menu is set to 'Comma (,)'.
- Time Date Range Filter:** 'Please select a time date range filter. Only records that were modified between the time date range you select will be exported. If you don't specify a time date range, then all of the records will be exported.' There are two input fields: 'Export data modified on or after (>=)' and 'Export data modified before (<)', both with calendar icons.
- Options:** 'Please use the below options that work best for you.' There are three checkboxes: 'Enable Email Notification' (unchecked), 'Include Weblink URL in Export Files' (checked), and 'Scan export .zip file for viruses' (checked).

At the bottom right of the form, there are 'Previous', 'Next', and 'Cancel' buttons.

STEPS TO ENABLE

There are no steps required to enable the feature.

Picklist Export to Include Enabled / Disabled Indicator

Prior to Release 37, the admin export of Picklist values via Data Export Assistant, only exported the following fields: Record Type, Field Name, Values and Language Independent Code. In this release, Oracle CRM On Demand also exposes the Disabled indicator flag and the Order of the picklist values in the exported file. This helps users to ignore the disabled values while moving picklist values across environments.

STEPS TO ENABLE

There are no steps required to enable the feature.

Restrict Number of Records to be Downloaded Using Lists, by Role

Prior to Release 37, users could export all records without any restriction from a list. This feature introduces a new setting 'Maximum Number of Records per List Export' at the Role level to restrict the number of records that can be downloaded using list exports. The default value of the setting is blank, which means no restriction on the number of records that the user can download using the Export List option. If administrators want to restrict the number of records downloadable using Lists to a finite number, they can update the Role Level setting with the finite number and assign the role to the users. This allows better control over Oracle CRM On Demand data as it restricts the volume of list data that users can export from the Oracle CRM On Demand application.

For example if there is a list with more than 100 records, but the user's Role setting 'Maximum Number of Records per List Export' is set as 100, then when the user exports the list using the Export List menu option, the exported CSV file will have only 100 records.



Role Management Wizard: Administrator | [Back to Role List](#) [Help](#)

[Step 1 Role Information](#) | [Step 2 Record Type Access](#) | [Step 3 Access Profiles](#) | [Step 4 Privileges](#) | [Step 5 Tab Access & Order](#) | [Step 6 Page Layout Assignment](#) | [Step 7 Search Layout Assignment](#) | [Step 8 Homepage Layout Assignment](#) | [Step 9 New Record Layout Assignment](#)

[Next](#) [Finish](#) [Cancel](#)

Role Information

If any of the settings are left blank, then the Company settings are inherited.

Key Role Information

Role Name* Administrator Created By Oracle CRM OnDemand CSR Admin 09/01/2008 01:47
 Mark for Translation Modified By John Smith 05/29/2018 00:26:53
 Description OnDemand Role Default Sales Process

User Interface Settings

Default Theme Action Bar and Global Header Layouts Joju Johnny
 Tablet Theme Lead Conversion Layout
 Related Information Format

Security Settings

Expire User Passwords In
 Maximum Number of Records per List Export 100

STEPS TO ENABLE

1. Click the global link Admin.
2. Click the link User Management and Access Controls.
3. In the Role Management section, click Role Management.
4. Click Edit for the Role you wish to edit.
5. In Step 1 of the Role Management wizard, update the field Maximum Number of Records per List Export with a finite number and click Save.

TIPS AND CONSIDERATIONS

- » In the case of Immediate List export, only 250 records will be exported even if the Role level restriction allows more records to be downloaded for each list export. If the Role level restriction allows less than 250 records to be downloaded, then the number of records in the Immediate List export will be determined by the Role level setting.
- » The setting affects only List Exports and not the exports using Data Export Assistant.

Usability

Ability to Add Multiple Campaign Recipient Records at a Time

Prior to Release 37, users could only add one recipient to a campaign at a time, through the UI. This feature introduces a List Add button in the Campaign Recipient related information applet to add multiple campaign recipients at a time. On clicking List Add, the application opens a lookup with shuttle window that displays a list of contacts from which users can select multiple contacts as recipients. The functionality significantly reduces the time required to add multiple recipients to a campaign.

Campaign Detail: Product Cross Sell Campaign | [Back to Campaign Homepage](#) [Edit Layout](#)

[Campaign Detail](#) | [New](#) | [Edit](#) | [Copy](#) | [Delete](#)

Key Campaign Information:

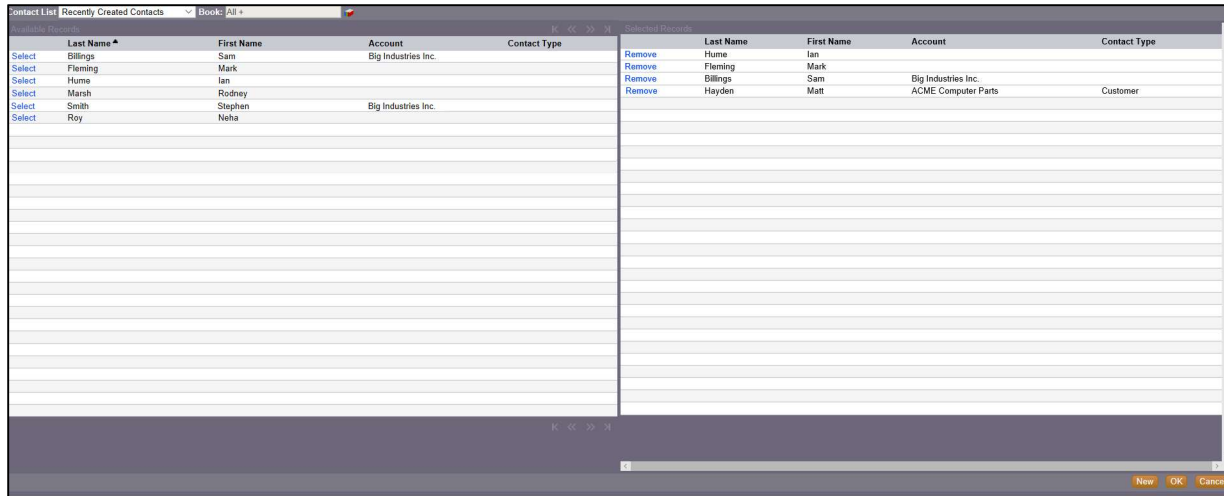
Source Code 1200	Status Active
Campaign Name Product Cross Sell Campaign	Start Date 6/11/2015 03:37 AM
Campaign Type Direct Mail	End Date 6/11/2015 03:37 AM
Objective	Campaign Currency GBP
Book John Smith	

Campaign Plan Information:

Recipients [Add](#) [List Add](#)

	Last Name	First Name	Job Title	Work Phone #	Delivery Status	Response Status
Edit	Hayden	Matt	Purchase Manager	13634634 #859	Sent	RSVP - Will Attend

[Show Full List](#)



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

- » Customers can hide the button using Java Scripts, if they do not want to have the List Add button on the Campaign Recipient related information applet.

Ability to Save and Add Another Attachment on the Attachments Page

Prior to Release 37, users can add an attachment to a record using the Attachment Edit page and clicking on Save. On clicking Save, users are navigated back to the record detail page. However, adding multiple attachments to a record required navigating back and forth between the Attachment Edit page and the record detail page.

In Release 37, Oracle CRM On Demand has added a Save and New button in the Attachment Edit page so that user can add multiple attachments (file or URL) without having to navigate back and forth between the Attachment page and the record detail page.

STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

- » The new Save and New button can be hidden by using the hide function of Oracle CRM On Demand JavaScript API

Support Today, Timestamp and Duration Functions in List

In Release 37, users can create lists based on calculations with date and datetime in filter criteria. The existing expression builder functions - Today(), Timestamp() and Duration() - can now be used in the search criteria for lists for filtering Date or Datetime fields and with the following list conditions: Between, Equal To, On, On or after, On or before, Not Between, Not Equal to.

STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

- » Today() can be used with Date and Datetime fields, however, when used with Datetime fields, the date is treated as 12AM on today's date.

Web Services

Ability to Batch Restore Records that were deleted through Web Services

Prior to Release 37, Oracle CRM On Demand did not treat deleting records through Web services as a batch delete. When restoring records, users had to restore each record individually using the Deleted Items page.

In Release 37, Oracle CRM On Demand has added a new optional attribute, `AvailableForBatchRestore`, for the Delete Web Services v2.0 API. When set to true and if the record type supports batch delete and restore, records deleted using the record type Web services can be restored in batch using the UI batch delete and restore functionality. If the record type does not support batch delete and restore or the attribute is set to false, then records will continue to be deleted through Web services, however, the records will need to be restored individually using the Deleted Items page.

STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

- » Ensure your role has the Batch Delete and Restore privilege.

Workflows

Enhance Send Email Workflow Action with Reply to Option

In Release 37, emails can be sent using workflows with a “reply to” email address that is different from the “from” email address”. Oracle CRM On Demand has enhanced the Send Email workflow action to support an optional “reply to” which can be set as the current user’s email address or a specific email address. When a recipient of an email receives an email sent through workflow, the recipient can click on Reply, and the “To” field of the email response is automatically set to the “reply to” email address as configured in the Send Email workflow action.

STEPS TO ENABLE

There are no steps required to enable the feature.

Scheduled Workflow

Prior to Release 37, there was no ability to schedule a workflow to run at a certain time. The application triggered Workflows only when an action occurred on a record. In Release 37, users can schedule workflows to trigger at a certain time instead of when an action occurs on a record. The feature introduces a new “Scheduled Event” trigger event. Users can configure Workflows with the new trigger event with a start date, recurrence period, and an end date or # of occurrences, after which the workflow should execute. Users can configure Workflow actions on these workflows, which are performed on a list of records instead of one record. The workflow actions supported are Send Email, Create Task, Assign a Book and Update Values.



Workflow Rule Detail: Email when Oppty Close in 2 days | Back to Pending Instances List

Workflow Rule Details | New | Edit | Copy | Delete | Translation Language: English-American

Key Workflow Rule Details

Workflow Name: **Email when Oppty Close in 2 days**
Active:
Record Type: **Opportunity**
Created By: **Admin Admin** 27/06/2018 09:47 AM
Trigger Event: **Scheduled Event**
Description:
Modified By: **Admin Admin** 27/06/2018 09:49 AM

Schedule Details

Initiated By: **ADMIN** | Status: **Terminated**
Execute rule for records matching the **Oppty's closing in 2 days** conditions of the list
Enable Notification:
Start Date Time: **27/06/2018 12:00 PM** | Recurring: **Every 1 Day(s)**
End After: **5 Occurrences**

Actions

Order*	Active	Name	Type	Last Modified
All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z				

Number of records displayed: 10

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STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

- » The scheduler executes the scheduled instance for the Workflow at the closest time possible to the scheduled resume date time of the instance. The time it actually runs may be at the same time as the scheduled instance or it may depend on the length of other prior scheduled jobs.
- » To ensure performance for each scheduled workflow, the following limiters are in place:
 - » Each scheduled workflow can process up to 1000 records. If a user selects a list that has more than 1000 records on execution, the workflow error monitor will log an error and the application will not process the actions.
 - » Each scheduled workflow can have up to five workflow actions configured.
 - » There can be up to 100 active schedule workflow configured.
- » Even with the limiters, for better performance of the scheduled workflows, keep in mind the following best practices:
 - » Always refine the list selected so that it is as concise as possible, so that it contains minimal number of records.
 - » Keep the number of active scheduled workflows to a minimum and avoid configuring multiple scheduled workflows to execute at the same time.
 - » Keep the number of wait workflow actions configured for other existing or new workflows to a minimum.

Training and Support Center

The Training and Support Center portal makes it easy for you to pinpoint the training resources and support that you need, depending on your job role, your level of expertise with the product, and the phase of using Oracle CRM On Demand.

ORACLE MY ORACLE SUPPORT PowerView is Off Switch to Cloud Support Carmel (Available) (0) Contact Us Help

Dashboard Knowledge Service Requests Patches & Updates Community Certifications More...

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Oracle CRM On Demand Training and Support Portal (Doc ID 2195497.1) To Bottom

Welcome to the Training and Support Page!

Note: This is a temporary replacement for the Training and Support website. Information about Portal Alerts will only be available through emails, as is done presently, until the new Training and Support site is available. If you have any questions, please use the Contact Us tab below.

This page gives you tools and resources that can help you make the most of the CRM On Demand application.

Support Get Started Learn More **Release Info** Communities Contact Us

Oracle delivers several new releases for CRM On Demand each year containing the latest functional enhancements. Customers will always benefit from deployment of the latest release, including any patches or hot fixes where available. New releases will normally be delivered during your standard monthly maintenance window, and will generally require no extended maintenance.

Upgrade Planning

- Prepare for the Next Major Release
- Oracle CRM On Demand New Release FAQ

What's New

Release 37

- Release 37 Administrator Preview Guide
- Release 37 Product Release Notes

Was this document helpful?
 Yes
 No

Document Details
Type: ANNOUNCEMENT
Status: PUBLISHED
Last Major Update: May 1, 2018
Last Update: Jul 26, 2018

Related Products

Information Centers

Document References
No References available for this document.

Recently Viewed
Oracle CRM On Demand Training and Support Portal [2195497.1]
Oracle CRM On Demand Release 37 Administrator Preview Guide [2426928.1]
Oracle CRM On Demand Guide REST Errors Guide [1802485.1]

Training and Support Center – Release Info tab

The **Support** tab provides alerts and notifications specific to your application environment.

The **Get Started** tab lists resources based on your specific role together with resources aimed at helping you get the most out of your first 30 days with Oracle CRM On Demand.

The **Learn More** tab outlines information in key topic areas, such as administration, integration, and reports. Go to this tab to get the resources you need to move beyond the basics.

The **Release Info** tab contains information specific to the current and upcoming releases of Oracle CRM On Demand. Access this tab to prepare for upgrades to your Oracle CRM On Demand application.

The **Best Practices** tab contains a compilation of knowledge gained by experts that work with Oracle CRM On Demand day in and day out. Access this knowledge to benefit from their vast experience.

The **Communities** tab offers connections to others in the Oracle CRM On Demand community through forums, communities, blogs, and more.

Quick Links

Use the Quick Links, located in the blue bar under the tabs to focus in on specific resources:

- » The Browse Training link opens the training catalog. From that page, you can see the instructor-led training, Webinars, quick guides, use cases, and tools available to you.

- » The Browse Knowledge link takes you to the knowledge base, where you can get answers to frequently asked questions.
- » The Submit a Service Request link directs you to My Oracle Support, where you can log a service request.
- » The Web Services Library provides sample APIs and a link to Oracle Sample Code, where you can get samples to help you build custom integrations.
- » The Add-On Applications link allows access to our downloadable applications, which extend the functionality of Oracle CRM On Demand.
- » The Templates and Tools link provides access to resources that can help you to design and configure Oracle CRM On Demand to meet your company's specific needs.

Search

Use the Search box to find resources across the entire Training and Support Center based on keywords or Doc IDs. For example, searching on Analytics will capture instructor-led training (for example, the Advanced Analytics Workshop), Webinars, FAQs, and best practices for optimizing analytics performance.

Access

To access the portal, click the Training and Support link in the upper right of any page in Oracle CRM On Demand.

Additional Resources

Before you begin setting up the new Oracle CRM On Demand Release 37 features for your company, here are some excellent resources that can assist you.

Online Help

Online help is a resource for all users. From each page in Oracle CRM On Demand, you can click the Help link to view information specific to that page. Check the online help to review field descriptions or find instructions on how to perform tasks.

On Demand Documentation on OTN

You can retrieve Oracle CRM On Demand documentation on the Oracle Technology Network. The documentation library includes PDFs of translated online help content, and various configuration and administration guides. You can view the documentation library here:

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

Contact Customer Care

Our experienced Oracle CRM On Demand Customer Care team is ready to help you with any of your Oracle CRM On Demand Release 36 questions or issues.

Please use one of the following toll-free numbers based on your location:

- » United States & Canada
 - » Toll Free: 866-853-8521
 - » Toll: 512-501-7113
- » Australia: 0011-800-08538521
- » China: 10800.130.1178
- » China Alternate: 86.800.810.0366
- » Belgium: 0800-7-5630
- » France: 00-800-08538521
- » Germany: 00-800-08538521
- » Hong Kong: 001-800-08538521

- » India: 000-800-100-1148
- » Indonesia: 001-803-1-002-0896
- » Italy: 00-800-08538521
- » Japan: 010-800-08538521
- » Korea: 00798-1-1-002-0896
- » Luxemburg: 800-2-6576
- » Malaysia: 1-800-81-3753
- » Mexico: 001-866-678-9037
- » Netherlands: 0800-022-6451
- » New Zealand: 0800-447171
- » Pakistan: 00-800-01-001-866-435-7705
- » Philippines: 1800-1-111-0178
- » Spain: 00-800-08538521
- » Singapore: 001-800-08538521
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- » Sri Lanka Colombo: 2-430-430-866-435-7705
- » Sri Lanka (outside Colombo): 112-430-430-866-435-7705
- » United Kingdom: 00-800-08538521
- » Vietnam: 1-201-0288-866-435-7705

Important Dialing Instructions

All numbers listed above for countries outside of the United States & Canada are UIFN (Universal International Freephone Numbers). Please dial all numbers exactly as listed. These numbers are Freephone and subsequently will not cause any charges to our customers.



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Integrated Cloud Applications & Platform Services

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