



CRM ON DEMAND

Product Release Notes

Release 37

September 2018
VERSION 20180925

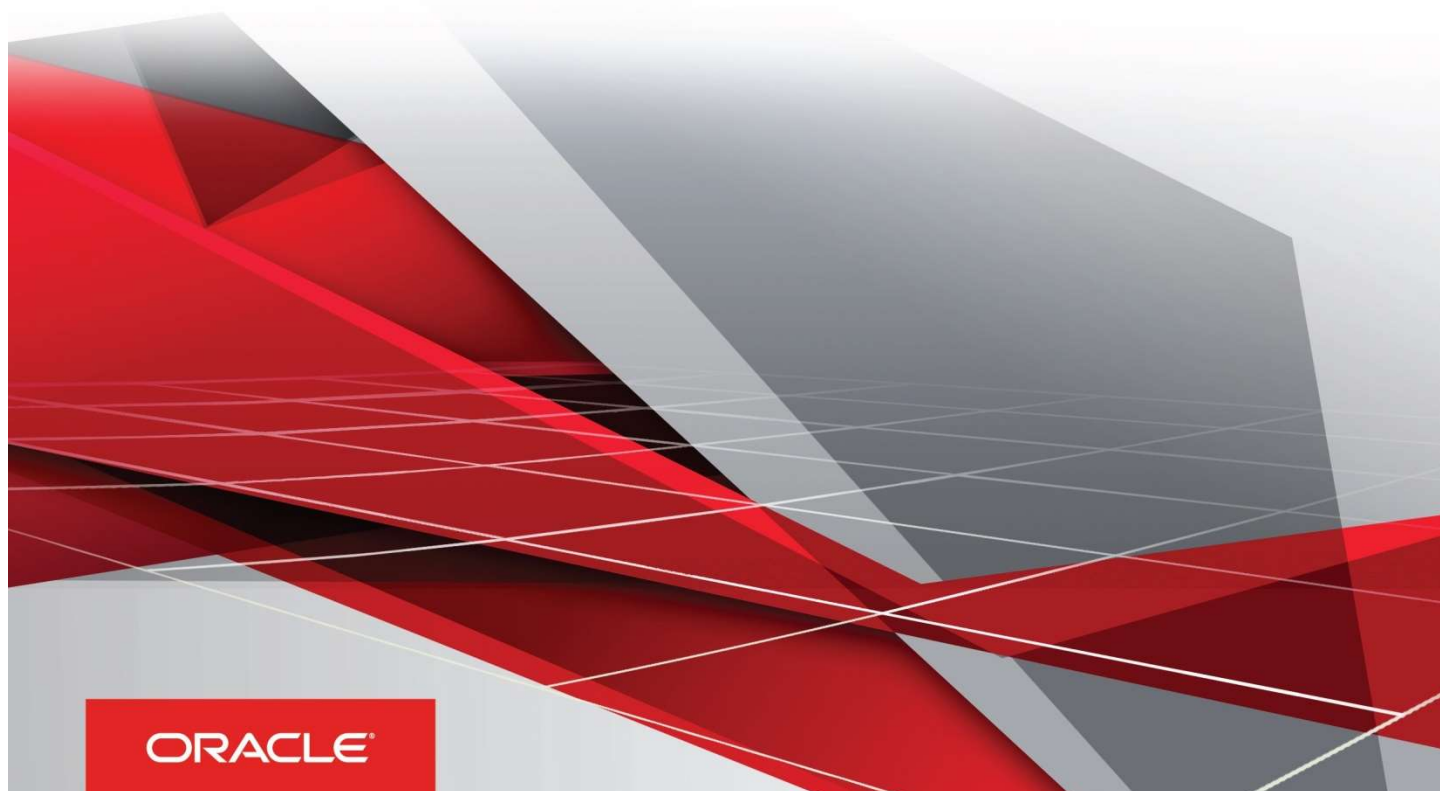


Table of Contents

Document Versioning	3
Overview	4
Known Issues	4
Analytics	4
Archive Operation Fails if the Compressed .catalog File is Bigger Than 20 MB	4
Archive Operation is Not Available for the Conditions Object Type in V3 Analytics	4
Unarchive Operation Cannot be Cancelled	4
Briefing Book Issues While Downloading in PDF Format	4
Briefing Book MHT Download Opens a Blank Page When a Dashboard Without Action	
Links is Added to the Briefing Book	4
Briefing Book PDF and MHT Downloads Don't Match for a User Downloading a Briefing	
Book Created by Another User that Added My Dashboard Page to the Briefing Book	5
Briefing Book's Table of Contents is Available Only in English	5
Integration	5
Sort Order in List Exported File is Not Same as the UI List	5
URL to the REST API Troubleshooting Help Page is Replaced With a New URL	5
Workflow	6
Copying Scheduled Workflow Does Not Copy the Scheduled Details	6
Incorrect Error Message Returned for Scheduled Workflow When End DateTime is Less	
Than Start DateTime	6
Incorrect Error Message Returned for Workflow When Adding More Than the Maximum	
Workflow Actions Allowed	6
Scheduled Workflow is Not Deactivated When All Instances are Completed	6



Status for Scheduled Workflow is Incorrect in the Email Notification When All Instances are Completed	6
Translation Error for Strings in the Schedule Details Section for Scheduled Workflows	6
Workflow Instance Scheduled to Run During Daylight Saving Time Change is Not Run at the Right Time	7
Customer Impact	7
Analytics	7
Language Support	8
Fixed Issues	9
Documentation	11
Online Help	11
Topic: About Scheduled Events	11
Topic: About Workflow Rules	12
Topic: Workflow Pending Instance Fields	12
Topic: Workflow Wait Monitor	13
Topic: Custom Objects and Opportunity Historical Analytics Subject Area	14
Oracle CRM On Demand REST API Guide	14
Topic: Error Response Format	14
Topic: REST API Connection Attributes Example	14

Document Versioning

Date	Version	Change Reference
September 25, 2018	20180925	Removed 'Analytics Charts No Longer Display in V2 Analytics when Using Chrome' from the Known Issues section. Added 'Topic: Custom Objects and Opportunity Historical Analytics Subject Area' to Documentation section.
August 31, 2018	20180831	Final version Published
July 23, 2018	20180723	Draft version Published

Overview

The Oracle CRM On Demand Release 37 Product Release Notes outline the known issues, the customer impacts, and the 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 37, as well as the Transfer of Information (TOI) recording, available on the [Release 37 documentation](#).

Known Issues

Analytics

With the upgrade to Release 37, users have the ability to copy Analytics objects from one environment to another using Archive and Unarchive operations. The following issues pertain to Archive and Unarchive operations.

Archive Operation Fails if the Compressed .catalog File is Bigger Than 20 MB

The Archive operation fails with '500 Internal Server Error' if the size of the compressed .catalog file is more than 20 MB.

Archive Operation is Not Available for the Conditions Object Type in V3 Analytics

The Archive operation is available for all the V3 Analytics object types except for the Conditions object type.

Unarchive Operation Cannot be Cancelled

Users cannot cancel the Unarchive operation. The operation continues until the compressed file is unarchived at the destination.

In Release 37, Oracle CRM On Demand introduces the ability to work with briefing books in V3 Analytics. The following topics pertain to briefing books.

Briefing Book Issues While Downloading in PDF Format

- Dashboards can have action links that navigate to pre-built dashboards or to migrated dashboards in Migrated Company Wide Shared Folder. When dashboards containing these types of action links are added to briefing books, the PDF version of the briefing book throws an error while downloading, if these actions links are also set with 'Open Link in a New Window' and 'Add To Briefing Book' checkboxes selected.
- Users can save dashboards with names having special characters. When users add these dashboards to briefing books and download the briefing book to PDF format, it throws an error.

Briefing Book MHT Download Opens a Blank Page When a Dashboard Without Action Links is Added to the Briefing Book

If a user creates a dashboard containing reports but no action links, runs the dashboard and adds a page to a briefing book, then the briefing book download using MHT format opens a blank page.

Briefing Book PDF and MHT Downloads Don't Match for a User Downloading a Briefing Book Created by Another User that Added My Dashboard Page to the Briefing Book

When a user runs My Dashboard, adds a page to a briefing book and adds a shared report to the same briefing book, and if another user downloads the briefing book using MHT format, then the user will not be able to see the original user's My Dashboard page. When downloading using PDF format, the other user is able to see the original user's My Dashboard page.

Briefing Book's Table of Contents is Available Only in English

When users download briefing books in PDF format, the Table of Contents is available only in English.

Integration

Sort Order in List Exported File is Not Same as the UI List

When a list of records is exported using the List Menu, the records in the exported file are not in the same sequence as the records in the saved list as it appears in UI.


URL to the REST API Troubleshooting Help Page is Replaced With a New URL

When an error occurs for an Oracle CRM On Demand REST API request, an error code is returned along with additional information about the error in the response body. For example:

```
"Error": [
  {
    "problemType": "https://support.oracle.com/epmos/faces/DocumentDisplay?id=1663390.1",
    "title": "The value entered in field %2 of buscomp %3 does not match any value in the bounded pick list%1.",
    "httpStatus": 400,
    "detail": "The value entered in field AccountType of buscomp Account does not match any value in the bounded pick list PickList Account Type.(SBL-DAT-00225)",
    "problemInstance": "urn:ocrmod:/OnDemand/user/Rest/latest/Accounts",
    "errorCode": "SBL-DAT-00225",
    "OCRMODErrorDetail": {
      "Parameters": ["PickList Account Type", "AccountType", "Account"]
    }
  }
]
```

When an Oracle CRM On Demand REST API request is sent to log into a server session, the connection information is returned in the response body. For example,

```
{
  "Connection": {
    "apiVersion": "028",
    "apiVersionMinimum": "026",
    "clientHelpURL": "https://support.oracle.com/epmos/faces/DocumentDisplay?id=1663390.1",
    "dateFormatLocale": "yyyy-MM-dd, yyyy-MM-dd'T'HH:mm:ss'Z'",
    "languageLocale": "ENU",
    "maximumFileSize": 20,
    "Version": "028.009.000",
    "ServerDate": "2014-12-10T10:55:36Z",
    "LastLoggedIn": "2014-12-08T13:22:41Z",
    "UserLoginId": "REST/USER1",
    "UserId": "1QA2-21ATBK",
    "TenantId": "1QA2-21AI7F",
    "CompanyName": "rest"
  }
}
```



The problemType and clientHelpURL attributes in the error and connection responses indicate the location for help about troubleshooting. The URL (<https://support.oracle.com/epmos/faces/DocumentDisplay?id=1663390.1>) is no longer valid.

The correct URL, which should be returned in both the error and connection responses, is <https://support.oracle.com/epmos/faces/DocumentDisplay?id=1802485.1>.

Workflow

Copying Scheduled Workflow Does Not Copy the Scheduled Details

When users copy a scheduled workflow, the application copies the workflow details including workflow actions, with the exception of the schedule details. The application does not copy the schedule details such as Start Date, End Date and Recurrence Period to the new workflow rule. The administrator will need to enter the schedule details in the new workflow rule before saving the new workflow rule.

Incorrect Error Message Returned for Scheduled Workflow When End DateTime is Less Than Start DateTime

When saving a scheduled workflow with the end date time less than or equal to the start date time, an incorrectly formatted error message "The value '[timestamp]' for field 'Request End Date' is required to be '>= [Repeating Start Date] and >= Today()'. Please enter a value that is '>= [Repeating Start Date] and >= Today()'." is returned, instead of an error that states "The End date time cannot be less than the Start date time."

Incorrect Error Message Returned for Workflow When Adding More Than the Maximum Workflow Actions Allowed

Oracle CRM On Demand is designed to not allow more than 5 workflow actions for scheduled workflows or 25 workflow actions for other workflows; however, an incorrect error message "The server encountered an unexpected condition which prevented it from fulfilling the request." is returned when users add more than the maximum number of workflow actions allowed. The error message should correctly identify that the maximum workflow actions allowed for a workflow rule is reached and no more workflow actions can be added.

Scheduled Workflow is Not Deactivated When All Instances are Completed

When all instances of a scheduled workflow is completed and there are no additional instance scheduled to execute for the scheduled workflow, then the workflow status is set to "Completed" and the workflow should be deactivated. However, the workflow's Active field is still selected and is not deactivated.

Keeping the workflow as active when all instances are completed is not functionally an issue, however, if the administrator wants to activate the workflow again, the administrator must manually deactivate the workflow, save the workflow, and then reactivate the workflow, and then save again.

Status for Scheduled Workflow is Incorrect in the Email Notification When All Instances are Completed

When all instances of a scheduled workflow are completed and there are no additional instance scheduled to run for the scheduled workflow, then the workflow status is set to "Completed". However, in the email notification, the workflow status shows as "Scheduled". The recipient will need to log into Oracle CRM On Demand to see that the workflow is in "Completed" status.

Translation Error for Strings in the Schedule Details Section for Scheduled Workflows

The following strings on the workflow detail or edit page for scheduled workflows are not translated correctly for Traditional Chinese, Simplified Chinese, Japanese, Korean, Russian, and Polish as each word was translated individually instead of as a sentence:

☐ After Occurrences

Every* Hour(s) * also includes "Day(s)", "Week(s)", "Month(s)",
"Year(s)"

Workflow Instance Scheduled to Run During Daylight Saving Time Change is Not Run at the Right Time

For instances of scheduled workflows where the execute time falls on the daylight saving time change is not run at the right time. Oracle CRM On Demand runs them 1 hour before or 1 hour after the expected time. The execute time for a scheduled instance should be recalculated to the correct time during the daylight saving time change.

Customer Impact

Analytics

V2 Analytics Performance Metrics from Usage Tracking Subject Area

V2 Analytics Performance metrics are no longer available for reporting in Usage Tracking Subject Area with the upgrade to Release 37. Customers who find this information important should consider creating a V2 report based on the Usage Tracking subject area using the V2 Analytics performance metrics and download the results prior to their Oracle CRM On Demand instance being upgraded to Release 37.

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					✓																

* 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 37.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
27743805	Analytics	A book deleted through UI is still reported in V3 Analytics analyses.
10646699	Analytics	Account's Primary Contact is still reported in Account History and Accounts subject areas even if it was deleted through the UI.
10646246	Analytics	Custom fields Integer 8 and Integer 9 are missing from all the historical subject areas containing the Campaign folder.
26944582	Analytics	Embedding dashboards with multiple pages, subpages, dashboard prompts and reports having drill downs to other dashboards in Web applets and tabs, affects the drill down and the server responds with an exception.
27901418	Analytics	In analysis with trellis view, when user edits the trellis view in Layout pane and hovers the columns with the mouse, the page jumps down to the bottom and the user cannot edit the columns properties.
27743572	Analytics	In analysis with trellis view, when user hovers the records with the mouse, the page jumps down to the bottom.
10645931	Analytics	In Opportunity History subject area the Default Look In Setting and the Default Analytics Look In Setting fields are truncated.
27413511	Analytics	In Opportunity Team subject area, the Opportunity's Expected Revenue displayed in reports does not match UI.
13870706	Analytics	In Partners real-time subject area, the Owned By User fields display the information related to the user who created the Partner record instead of the actual owner.
28373948	Analytics	In V3 Analytics, "ORA-00937: not a single-group group function" error is displayed when analyses contain aggregation columns and additional non-aggregation columns having CASE statements with subqueries.
28291584	Analytics	In V3 Analytics, the Opportunity."Opportunity Revenue" field is displayed empty instead of showing the correct value when the Account associated with Opportunity does not have a Parent Account and the Parent Account field is added to the analysis.
28339004	Analytics	In V3 Analytics, the "Opportunity Lists"."- Opportunity Custom Metrics"."S_NUM_0" field is displayed empty instead of showing the correct value when the field "Opportunity Lists"."- Opportunity Custom Metrics"."S_INDEXED_NUM_0" contains null values and is used in a formula of another field in the analysis where the null value is not converted to 0.
27995016	Analytics	Logo custom image defined in Title Views is not rendered in V3 Analytics.
28505504	Analytics	Parameters P0 to P18 are ignored for weblinks of type Dashboard.
27785346	Analytics	Records are dropped when users report on Forecasts subject area and select fields from the Book folder along with hierarchy fields. Also in Business Plans subject area when users report on books and metrics like # of Accounts, # of Contacts, # of Leads, # of Activities or # of Custom Objects 01..03, the metrics do not show correct values.
10646212	Analytics	Short text fields are truncated to 30 characters (instead of displaying up to 40 characters) in Campaign History and Service Request History subject area.
26500520	Analytics	Some browsers (Chrome) become unresponsive if the name of the analysis contains '\$&' characters.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
28109374	Analytics	The Activity Type field from Activity folder in Activity History subject area returns incorrect value.
27495714	Analytics	The associated visibility roles are displayed in ENU for non-ENU users.
21434343	Analytics	The changes on the Opportunity Contact Role of Primary Contact are not reflecting the modified values in reporting on the Opportunity Contact History.
22237381	Analytics	The exchange rate is not considered when reporting on Primary Contact Total Income in Account History subject area.
28276150	Analytics	The "Indexed Number" field from the Opportunity Metrics > Opportunity Custom Metrics folder from the Opportunities real-time subject area returns incorrect value if both Product Interest and another non-indexed Opportunity Custom Metrics columns exist in the report.
27568113	Analytics	The maximum number of downloadable records in CSV or Tab Delimited format is limited to 65,000 in V3 Analytics.
21388421	Analytics	The number of solutions "# of Solutions" metric shows blank instead of the actual number in Solution History subject area
21450956	Analytics	The Opportunity Team Role value is not reported in Company Language (Non ENU) in Opportunity Team History and Opportunity Team Lists.
26387934	Analytics	The ReportList method available in Report Services API, misplaces the double quotes characters when reporting the list of reports containing double quotes in their name.
28221257	Analytics	The Service Request Count field under Solution folder in both Solution History and Solutions subject area has decimal instead of integer format.
28109374	Analytics	The Team Role field under Opportunity Team folder in Opportunity Team subject area is displayed in ENU for non-ENU users.
28303838	Analytics	When a report times out in V3 Analytics, the application displays a non-user-friendly timeout message.
27898995	Analytics	When users embed a dashboard in a custom web tab and the dashboard contains a report that is set to render as a link (instead of fetching results directly) by setting the 'Display Results to Link - In a Separate Window', the report results are displayed in the same browser tab and not in a new one as expected.
27799602	Analytics	If users rename the Book Object, the new name is not reflected in Book Hierarchy Folder and Fields in Book folder in Business Plans and Forecasts subject area.
27964295	BPM	Emails configured by the Send Email Workflow Action are not being sent.
27471027	CRM	The Row ID field in user profile page has been renamed to "Analytics User Sign-in ID/Row Id".
27400897	CRM	When downloading an attachment from any record, any hyphen ('-') in the file name is automatically changed to an underscore ('_').
27198195	Customization	When a field is configured to be conditionally required, the field is not displayed as required and in red as expected.
26729090	Customization	When a multi-select picklist field is configured to be conditionally required, the field is not displayed as required and in red as expected.
28171757	Customization	When picklist fields are part of cascading picklists and dynamic layout is involved causing one of the picklist to be not editable in some cases, then inline edit does not work as expected.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
28414936	Integration	Geocoder fails to populate the longitude and latitude fields on Account Addresses.
20237097	Integration	Export log file contains some error logs that are not really errors.
27855145	Layout	Only 100 available homepage sections can be displayed in the Available Homepage Section list of the Homepage Layout Wizard. NOTE: This is enhanced to support 200 available homepage sections.
25763317	Layout	The order of the address fields for the country "Venezuela" is incorrect.
28198393	Single Sign-On	When trying to access CRMOD from a Single Sign-On portal and then clicking a CRMOD tab an error is presented to the user.
27457013	UI/Usability	Email addresses entered in upper case are not converted to lower case automatically. Note – We introduced an opt-in to configure the behavior.
27503545	UI/Usability	Sorting in Contact Lists is lost when user navigates to the second page of the list of records.
27568060	UI/Usability	In Japanese language, the welcome screen shows the user's last name instead of full name.
27047523	UI/Usability	The option to enable or disable record indicators in the Account Related Information of Custom Object 04 is missing.
26834346	UI/Usability	Users are getting an error while accessing homepage, due to a missing custom icon for Activity.
28344199	UI/Usability	Users lose visibility to their Custom Object 06 private lists if their role is associated to a Custom Object 06 List Order Layout.

Documentation

Online Help

The following documentation errors or omissions exist in Release 37 and will be corrected in a subsequent update.

Topic: About Scheduled Events

The following information is missing from this topic:

The maximum number of active scheduled events that is supported for an instance of Oracle CRM On Demand is 100. The following are some best practice tips for managing your scheduled events:

- » **Keep the number of active scheduled events to as few as possible.** Having too many active scheduled events can affect the performance of the workflow actions on the events.
- » **Keep the number of records in the list for a scheduled event to as few as possible.** Although a scheduled event can process up to a maximum of 1000 records in a list, the performance of the workflow actions on the events is better if the list is filtered to contain fewer records.
- » **Set up your scheduled events so that they execute at different times.** Performance can be affected if you schedule multiple events to execute at the same time.

The following information is also missing from this topic:

Even if workflow is not enabled (that is, the Enable Workflow check box on the company profile is not selected) at the time that a scheduled event is made active, a pending instance is generated for the first scheduled occurrence of the scheduled event. However, if workflow is not enabled when the resume date for the instance arrives, then the following happens:

- » None of the workflow actions configured on the event is performed.
- » If an error occurs that would cause the scheduled event instance to fail (for example, if the list of records exceeds the allowed limit), then the failure is report in the Workflow Error Monitor. Otherwise, the error monitor does not report a failure for the instance.
- » Another pending instance is created for the next scheduled occurrence of the event.
- » If the Enable Notification check box is selected on the scheduled event, then an email is sent to the user who made the scheduled event active. If an error was found that would cause the scheduled event instance to fail, then the email indicates that the instance completed with errors, otherwise, the email indicates that the instance completed successfully.

The same behavior applies for each instance of the scheduled event until workflow is enabled.

Topic: About Workflow Rules

In this topic, the Wait action is incorrectly included in the list of workflow actions that are supported for scheduled events (that is, workflow rules that have the Scheduled Event trigger event). However, the Wait action is not supported for scheduled events. Only the following workflow actions are supported for scheduled events:

- » Send Email
- » Create Task
- » Assign a Book
- » Update Values

In addition, this topic includes the following statement:

You can create multiple actions for a workflow rule or scheduled event, up to a maximum of 25 actions for each rule or scheduled event. If you try to create more than 25 actions on a rule or scheduled event, then you receive an error message.

However, for scheduled events, the maximum number of workflow actions that you can create for a scheduled event is five (5). The statement should instead read as follows:

You can create multiple actions for a workflow rule or scheduled event. You can create up to a maximum of 25 actions for a workflow rule. For a scheduled event, you can create up to a maximum of five workflow actions. If you try to create more actions than are allowed on a workflow rule or scheduled event, then you receive an error message.

Topic: Workflow Pending Instance Fields

The following field descriptions are missing from this topic:

Field	Description for Instances of Workflow Wait Actions	Description for Instances of Scheduled Events
Actual Start Time	Not applicable	If the instance has not yet started to execute, then this field is blank. If the instance is currently executing, then this field shows the

Field	Description for Instances of Workflow Wait Actions	Description for Instances of Scheduled Events
		date and time when the instance started executing.
Status	<p>The value in this field is always set to Queued.</p> <p>NOTE: After an instance of a Wait workflow action starts to execute, the instance is removed from the Workflow Wait Monitor.</p>	<p>If the instance has not yet started to execute, then this field is set to Queued.</p> <p>If the instance is currently executing, then this field is set to Running.</p> <p>NOTE: After an instance of a scheduled event completes, the instance is removed from the Workflow Wait Monitor.</p>

Topic: Workflow Wait Monitor

This topic contains the following information:

From the Workflow Wait Monitor, you can view the details of the following:

- » Pending instances of Wait actions and details of those workflow actions.
- » Pending instances of scheduled events, that is, workflow rules with the Scheduled Event trigger event.

The second bulleted point should instead read as follows:

- » Instances of scheduled events (that is, workflow rules with the Scheduled Event trigger event) that are pending or are currently executing.

In addition, this topic contains the following information and note:


A pending instance of a scheduled event remains in the Pending state until the date and time when the instance is scheduled to be executed (the resume date). The resume date is the earliest possible time that the instance will be executed. Depending on the load on the Oracle CRM On Demand database and on the Oracle CRM On Demand server at that time, the instance might not be executed immediately.

NOTE: After an instance of a scheduled event starts to execute, the instance is no longer shown in the Workflow Wait Monitor and you cannot delete the instance. If you want to terminate an instance that is currently being executed, then you must deactivate the scheduled event. For information about what happens when you deactivate a scheduled event, see [About Scheduled Events](#).

This information and note should be replaced by the following:

A pending instance of a scheduled event remains in the Queued state until the date and time when the instance is scheduled to be executed (the resume date). The resume date is the earliest possible time that the instance will be executed. Depending on the load on the Oracle CRM On Demand database and on the Oracle CRM On Demand server at that time, and on the number of Wait action instances and scheduled event instances that are pending, the instance might not be executed immediately. After the instance starts to execute, the status of the instance changes to Running and the Actual Start Time field is populated. You might need to refresh your browser page to see the updated fields. The instance continues to appear in the Workflow Wait Monitor while it is executing.

If necessary, you can delete an instance of a scheduled event while it is executing. If you do so, then the instance is



removed from the Workflow Wait Monitor. In addition, the status of the scheduled event is set to Terminated, the scheduled event is deactivated, and no further instances are generated for the remaining occurrences of the scheduled event. The instance continues to execute until the next time that Oracle CRM On Demand checks to determine if the scheduled event is still active. This check is performed at five-minute intervals during the time that an instance is executing. When Oracle CRM On Demand determines that the scheduled event has been deactivated, the instance that was executing terminates, and any workflow action that has not already been performed for the instance is not performed.

You can also delete an instance of a scheduled event while it is pending (that is, while the status is set to Queued), as described in [Deleting Pending Instances from the Workflow Monitor](#).

Topic: Custom Objects and Opportunity Historical Analytics Subject Area

The ability to report on the many-to-many relationship between Custom Objects 01, 02 and Opportunity History has been deferred to a later release. This topic is not applicable for Release 37.

Oracle CRM On Demand REST API Guide

The following documentation errors exist in Release 37 and will be corrected in a subsequent update.

Topic: Error Response Format

In the example, the following line:

```
problemType": https://support.oracle.com/epmos/faces/DocumentDisplay?id=1663390.1,
```

should be:

```
problemType": https://support.oracle.com/epmos/faces/DocumentDisplay?id=1802485.1,
```

Topic: REST API Connection Attributes Example

In the connection attributes response example, the following line:

```
"clientHelpURL": "https://support.oracle.com/epmos/faces/DocumentDisplay?id=1663390.1",
```

should be:

```
"clientHelpURL": "https://support.oracle.com/epmos/faces/DocumentDisplay?id=1802485.1",
```



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CONNECT WITH US



Integrated Cloud Applications & Platform Services

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