ORACLE®

CRM ON DEMAND

Product Release Notes

Release 38

May 2019
VERSION 20190529

ORACLE®

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Document Versioning

Date	Version	Change Reference
March 15, 2019	20190315	Final Version Published.
March 27, 2019	20190327	Updated a known issue of Shared Picklist functionality.
May 29, 2019	20190529	Updated a known issue of Workflow Scheduler with Analytics content and HTML Markup.

Overview

The Oracle CRM On Demand Release 38 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 38, as well as the Transfer of Information (TOI) recording.

Known Issues

Usability

Changing a Picklist Field to Shared Picklist May Result in Losing Display Value in Records

If there are translations of picklist values or if the Language Independent Code (LIC) does not match the display value and the customer already has records referencing the value, then when Administrator converts a picklist field to a shared picklist, it will lose the customized display values and show the LIC on those records. Records will display <No Values>. If customers expect the existing record values to remain valid, we recommend fixing any data referencing invalid values and ensure that existing record values are on the new source picklist with the same LIC.

Configure Default Search Values for Appointments and Tasks

For Appointments and Tasks, the default search values configured in the Appointment Search Layout and Task Search Layout respectively, will not apply when user creates a new list by clicking Create New List from the Activity list menu drop down. This is because CRM on Demand cannot distinguish if the user is creating an appointment list or task list. However, the default search values will apply in Action Bar search.

Issuing Country Field Values are Not Translated in Currency Definition Page

In Currency Definition page, the Issuing Country field values are in ENU language and the application does not translate the country names in other supported languages.

Analytics

Workflow Scheduled Events with Analytics Content that Has HTML Markup

The execution of a workflow scheduler with Analytics content will fail if the scheduled Analytics content has HTML markup code. The ability to schedule Analytics content with HTML Markup will be available in a Release 39.

Customer Impact

Administration

Existing Custom Fields Can be Configured as Related Information Fields

Company Administrators can edit existing custom fields and select the Enable Related Information checkbox on field definition page, thereby configuring the field as a Related Information field. When the field definition is changed, the

application clears any existing values on the field from all records and populate the field value from the source record type and field.

Existing Related Information Custom Fields Can be Configured as non-Related Information Fields

Company Administrators can edit existing Related Information custom fields and unselect the Enable Related Information checkbox on field definition page, thereby configuring the field as a non-Related Information field. When the field definition is changed, the application retains any existing values on the field on all records and users can update the field value.

Related Information in Field Definition Page is Renamed

In the field definition pages, the Related Information checkbox is renamed to Enable Related Information.

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 38.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
28216557	Analytics	A report on Activities subject area using Account optimized picklist fields times out.
27684991	Analytics	A report on Advanced Custom Objects subject area using fields from Custom Object 05 and Product folders times out.
28763238	Analytics	A report on Events subject area that filters on a valid value for the Event Id column, returns No Data.
28504901	Analytics	A report with Date prompt and Date format DD/MM/YYYY throws an error.
27725013	Analytics	Drill down in a report embedded in a web applet throws "The request could not be processed by the server. The request URI is longer than the permissible limit." error.
27899054	Analytics	In a report using Custom Objects 01 subject area, the formatting on a custom Date field from Custom Object 01 folder is lost and the formatting is reverted to the original setting.
26817243	Analytics	Leading spaces of a field are removed, when the analysis is printed in PDF format.
28942001	Analytics	Report Service API "ReportExecute" is failing when a report is saved inside any folder underneath Company Wide Shared Folder or Migrated Company Wide Shared Folder.
29055927	Analytics	USER_REFRESH_COMPLETE_DT session variable does not exist.
28559142	Analytics	When editing the formula for a column, clicking on the Column (Insert Criteria Column) drop-down in the Edit Column Formula window, does not display all the columns that are included in the Criteria tab if the report contains more than approximately 26 columns.
26877629	CRM	Inline editing of activities in Completed Activities Related Information applet results in an error.
29164475	Customization	An error occurs when editing a cascading picklist.
26430342	Customization	Issue with layout when there is a cascading picklist on the layout and the cascading picklist field is configured with a conditionally required expression.
27406675	Integration	List export of Accounts results in error when the list is huge, with about 2 million records.
28566749	Integration	When customer exports Custom Objects, the header record in exported file appears in English and French languages and is not consistent when exported again.
29021883	Integration	When users export Policy attachments, the exported file does not have policy id field of the parent policy record.
28459399	UI/ Usability	When users create a related appointment for an Account, the contact lookup does not display the context sensitive lists of Contacts related to the Account.

Documentation

The following documentation errors or omissions exist in Release 38 and will be corrected in a subsequent update.

Online Help

Topic: About Visibility to Records in Analytics

The following entry is missing from the table that details the visibility of record types in the real-time reporting subject areas:

Record Type	Subject Area	Manager Visibility	Team Visibility
Partner	All	Secured	Secured

Topic: Account Team Historical Analytics Subject Area

The information in this topic states that no metrics are available for this subject area. This information is incorrect. The following metrics are available for this subject area:

Account Team

- » Account Team Optimized Custom Fields
- » Account Team Optimized Custom Metrics

Topic: Record Types That Are Tracked

The following note for the Contact Address record type is incorrect:

NOTE: If a user removes an address from a Contact Detail page when the company is not enabled for shared addresses, then the modification tracking functionality only tracks Dissociate, Contact Update, and Address Predelete events. The functionality does not track the Address Delete event. To identify the address removed, refer to the Predelete event.

The note should instead read as follows:

NOTE: If a user removes an address from a Contact Detail page when the company is not enabled for shared addresses, then the modification tracking functionality only tracks the Dissociate event, the WriteRecordUpdated event for the contact record, and the PreDeleteRecord event for the address record. The functionality does not track the DeleteRecord event for the address record. To identify the address removed, refer to the PreDeleteRecord event.

Topic: Adding Action Links to Analyses

In this topic, an absolute URL is used in each of the examples of the code for an action link. However, it is recommended that you use a relative URL instead of an absolute URL in the code for a link. For example, the following shows the code to use for a link on an asset record, using a relative URL:

http://"@[html]"<a target=_top
href=/OnDemand/user/AssetDetail?OMTHD=AssetDetailNav&OMTGT=AssetDetailForm&AssetDetailForm.Id="@">
"@""

In addition, three of the examples in this topic incorrectly include a space before the final @ symbol in the link code. Note that in the corrected examples below, there is no space before the final @ symbol and a relative URL is used

instead of an absolute URL.

Incorrect example:

http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/AccountDetail?OMTGT=AccountDetailForm&OMTHD=AccountDetailNav
&AccountDetailForm.Id="@">" @""

Corrected example:

http://"@[html]"<a target=_top
href=/OnDemand/user/AccountDetail?OMTGT=AccountDetailForm&OMTHD=AccountDetailNav&AccountDetailFor
m.Id="@">"@""

Incorrect example:

http://"@[html]"<a target=_top href=https://server_name
/OnDemand/user/OpportunityDetail?OMTGT=OpptyDetailForm&OMTHD=OpportunityDetailNav&OpptyDetailForm.I
d="@">" @""

Corrected example:

http://"@[html]"<a target=_top
href=/OnDemand/user/OpportunityDetail?OMTGT=OpptyDetailForm&OMTHD=OpportunityDetailNav&OpptyDetailF
orm.Id="@">"@""

Incorrect example:

http://"@[html]"<a target=_top
href=https://server_name/OnDemand/user/OpportunityDetail?OMTHD=OpportunityDetailNav&OMTGT=OpptyDetail
Form&OpptyDetailForm.Id="@">" @"

Corrected example:

http://"@[html]"<a target=_top
href=/OnDemand/user/OpportunityDetail?OMTHD=OpportunityDetailNav&OMTGT=OpptyDetailForm&OpptyDetailF
orm.Id="@">"@"

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