ORACLE

CRM ON DEMAND

Administrator Preview Guide

Release 39

August 2019
VERSION 20190830

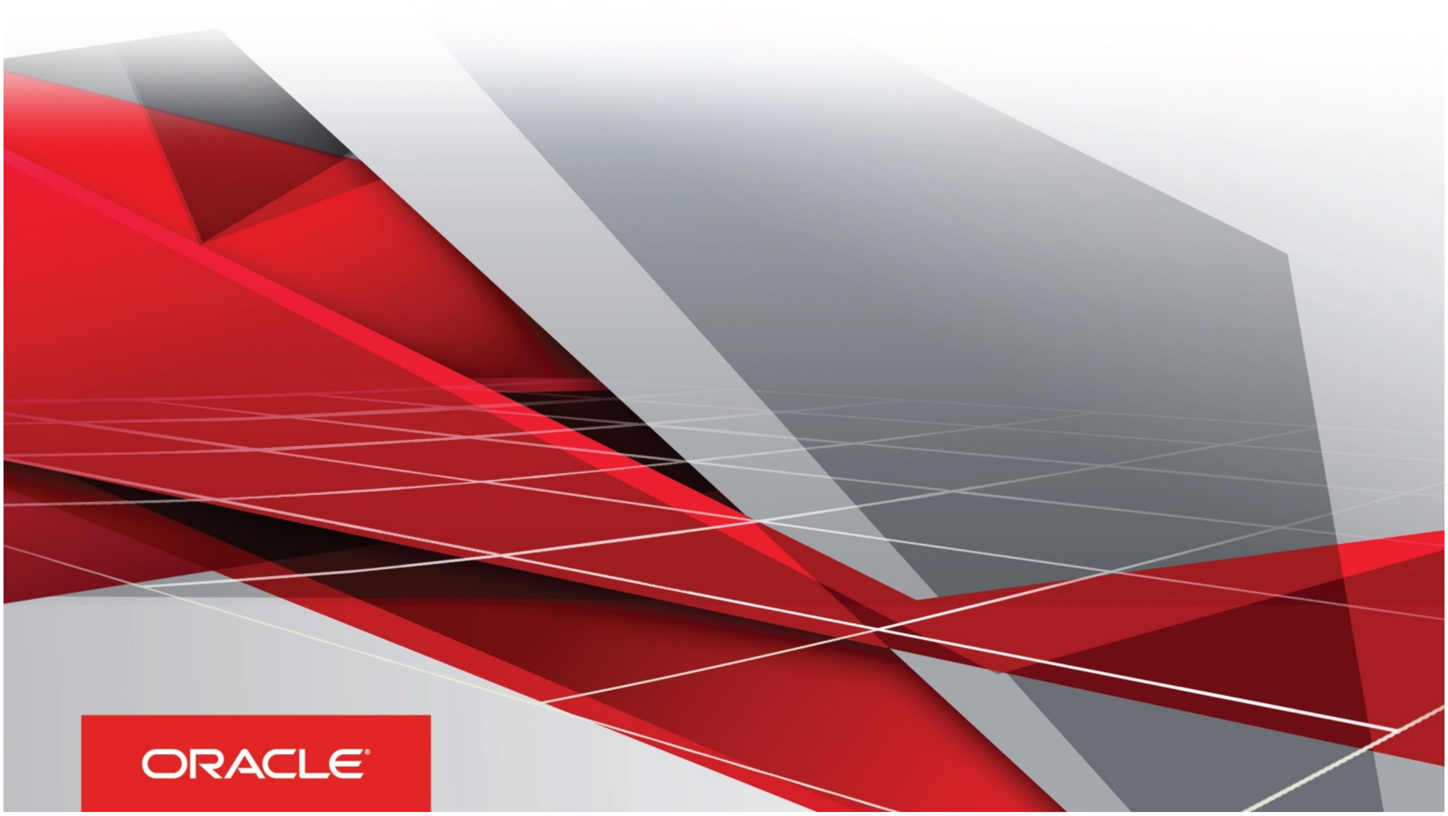


Table of Contents

Document Versioning 3

Summary of Release Features 4

Administration 5

- Global Picklist for Team Objects 5

Analytics 6

- Ability to Open Analytics in New Browser Window 6
- Ability to Provide Values for Analyses Prompts in Embedded Analyses 7
- Ability to Report on Assets Short Text Fields 46 to 70 in Analytics 7
- Ability to Select and Display Option Links when Embedding V3 Reports and Dashboards 8
- Add CO04..05 Dimensions to Advanced Custom Object Historical Subject Area 9
- Add Lead, Activity and Partner Dimensions in Advanced Custom Objects Historical Subject Area 10
- Add Missing Metrics to All Analytics Subject Areas 10
- Add Personalized Content Delivery Subject Area for Historical Reporting 11
- Add User Friendly Error Message for Bulk Copy, Move and Delete Operations in Analytics Catalog 11
- Expose CO01..02 Multi-select Picklists in Real-time Analytics 12
- Expose Missing Text Fields from Campaign Object in Analytics 12
- Expose Optimized Picklists Code Values in Real-Time Reporting Subject Areas 14
- Map Custom Fields in Account Partner and Opportunity Partner History and Reporting Subject Area 14
- Map Missing Field "Serial #" in Opportunity Product Revenue 15

Application Customization 16

- Ability for the System Administrator to Make Lists Visible to All Roles 16
- Ability to Create Custom Fields for Opportunity Partner and Account Partner 16
- Add Addresses to Opportunity and Make It Available on Maps 17
- Make Advanced Search Default Sort Optional 17

Connected Mobile Sales 18

Mark Tasks as Completed Directly from the Task List Page 18

Provide Edit Option for a Record via Sliding on List Pages 18

Synchronize Recently Viewed Records Between CMS and CRM On Demand 18

Usability 19

Ability to Assign Team User to List of Records 19

Ability to Edit Multiple List Records at a Time 20

Ability to Keep a Disabled Picklist Value on Record During Update 21

Display Account, Contact Phone, Activity Status Information in Group Calendar 21

Managing Favorite Records from List of Records 21

Feature Name in Title Case 22

Web Services 22

Expose Audit Trail as a Child Object in Web Services v2.0 22

Support Sorting for Field Management Administrative Area 22

Web Services Support for Custom Web Applets, Web Tabs, Web Links with V3 Analytics Content 22

Training and Support Center 24

Quick Links 24

Search 25

Access 25

Additional Resources 25

Online Help 25

On Demand Documentation on OTN 25

Contact Customer Care 25

Important Dialing Instructions 26

Document Versioning

Date	Version	Change Reference
July 12, 2019	20190712	First 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				
Global Picklist for Team Objects		✓		
Analytics				
Ability to Open Analytics in New Browser Window				✓
Ability to Provide Values for Analyses Prompts in Embedded Analyses				✓
Ability to Report on Assets Short Text Fields 46 to 70 in Analytics				✓
Ability to Select and Display Option Links when Embedding V3 Reports and Dashboards				✓
Add CO04..05 Dimensions to Advanced Custom Object Historical Subject Area				✓
Add Lead, Activity and Partner Dimensions in Advanced Custom Objects Historical Subject Area				✓
Add Missing Metrics to All Analytics Subject Areas				✓
Add Personalized Content Delivery Subject Area for Historical Reporting				✓
Add User Friendly Error Message for Bulk Copy, Move and Delete Operations in Analytics Catalog				✓
Expose CO01..02 Multi-select Picklists in Real-time Analytics				✓
Expose Missing Text Fields from Campaign Object in Analytics				✓
Expose Optimized Picklists Code Values in Real-Time Reporting Subject Areas				✓
Map Custom Fields in Account Partner and Opportunity Partner History and Reporting Subject Area				✓
Map Missing Field "Serial #" in Opportunity Product Revenue				✓
Application Customization				
Ability for the System Administrator to Make Lists Visible to All Roles		✓		
Ability to Create Custom Fields for Opportunity Partner and Account Partner		✓		
Add Addresses to Opportunity and Make It Available on Maps		✓		

Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
Make Advanced Search Default Sort Optional		✓		
Connected Mobile Sales				
Mark Tasks as Completed Directly from the Task List Page				✓
Provide Edit Option for a Record via Sliding on List Pages			✓	
Synchronize Recently Viewed Records from CRM On Demand				✓
Usability				
Ability to Assign Team User to List of Records		✓		
Ability to Edit Multiple List Records at a Time		✓		
Ability to Keep a Disabled Picklist Value on Record During Update		✓		
Display Account, Contact Phone, Activity Status Information in Group Calendar			✓	
Managing Favorite Records from List of Records				✓
Web Services				
Expose Audit Trail as a Child Object in Web Services v2.0				✓
Support Sorting for Field Management Administrative Area				✓
Web Services Support for Custom Web Applets, Web Tabs, Web Links with V3 Analytics Content				✓

Administration

Global Picklist for Team Objects

In Release 38, we introduced Global Picklist feature that allows users to share values of a picklist field on certain record types with another picklist field on the same or different record type. Release 38 functionality introduced support to custom picklists on Account, Contact, Opportunity, Opportunity Product Revenue, Lead, Service Request, Partner, Campaign, Activity, Solution, User, Custom Objects, Account Contact, Household Contact and Portfolio Contact. In this release, we have extended the support to custom picklists on all Object Teams.

In the field management page of Object Teams, a new checkbox field ‘Enable Shared Picklist Values’ is introduced, which becomes editable only for fields of type ‘picklist’. On enabling the functionality by selecting the checkbox Enable Shared Picklist Values, the Company Administrators can select a Source record type and a Source picklist field on the selected record type that can share its values with the custom picklist field created on Object Teams.

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, select any supported record type.
4. In the Field Management section, select the Record Type Team Field Setup link.
5. Click New Field button to create a new custom picklist or click Edit button of an existing custom picklist to edit the field definition of an existing custom picklist field.
6. Select the checkbox ‘Enable Shared Picklist Values’.
7. Select the source record type in ‘Shared Record Type’ field and select the source picklist field in ‘Shared Field’.

8. Click Save to save the field definition

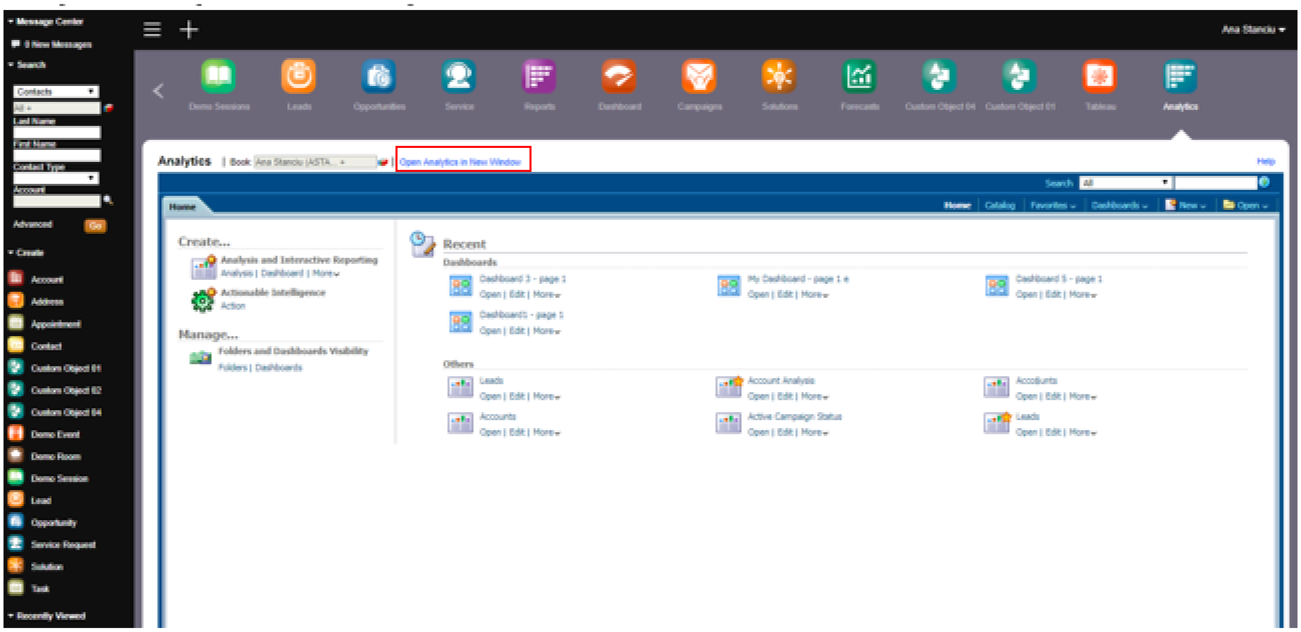
TIPS AND CONSIDERATIONS

None.

Analytics

Ability to Open Analytics in New Browser Window

Starting with Release 39, users with the Manage Custom Reports privilege, can work with Analytics in a new browser tab, that is separate from the main Oracle CRM On Demand browser tab. Users designing large analyses with many columns, can now navigate more easily using the horizontal scroll bar that always shows at the bottom of the page. In addition, the Catalog and the View panes are always visible on the page, without the need to scroll vertically to access them. To work with Analytics in a separate browser tab, users click on the Open Analytics in New Window link as shown in the illustration below.



STEPS TO ENABLE

There are no steps required to enable the feature.

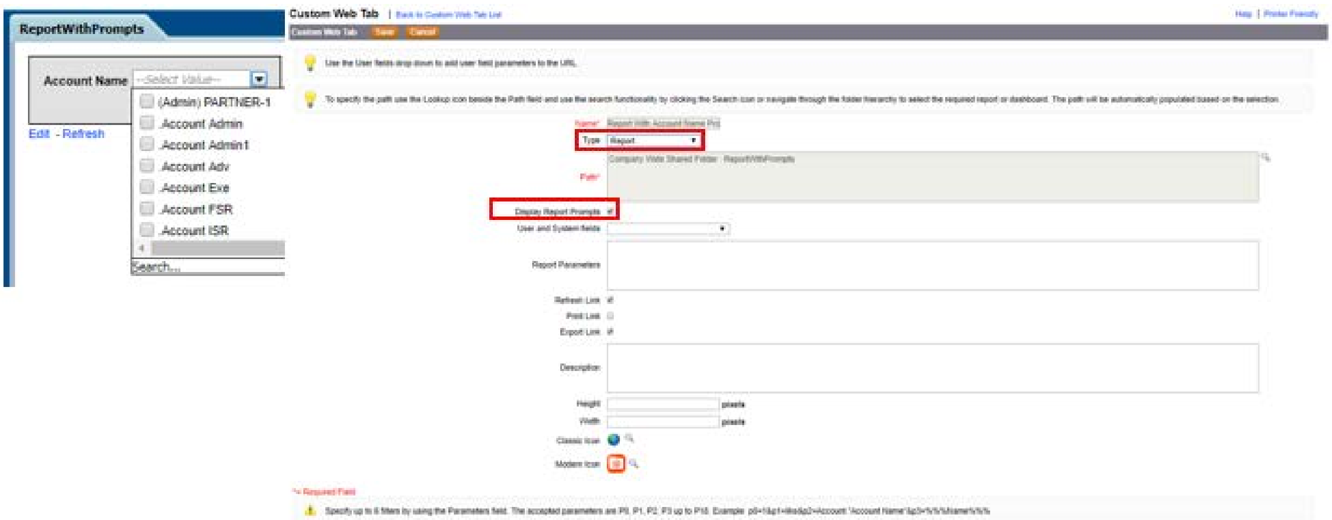
TIPS AND CONSIDERATIONS

- » If an analysis is open in both main Oracle CRM On Demand browser tab and in a separate browser tab, and users edit and save the analysis in the separate browser tab, then the analysis is not refreshed automatically in the main tab. Users have to refresh the analysis in the main browser tab to see the changes
- » The book selector is not available in the separate browser tab. Users can only select a book in the main Oracle CRM On Demand browser tab
- » If users drill down on an action link in an analysis in a separate browser tab, then the record opens in the main Oracle CRM On Demand tab
- » If the main Oracle CRM On Demand tab was closed and users drill down on an action link in an analysis in a separate browser tab, the error message “Action Links are disabled in this mode.” is displayed
- » If the Oracle CRM On Demand session times out in in the main Oracle CRM On Demand tab, then the session also times out in the Analytics separate browser tab

Ability to Provide Values for Analyses Prompts in Embedded Analyses

Starting with Release 39, a new option called Display Report Prompts is available in homepage reports and custom web tabs, web applets, report widgets or web links of Type=Report. When users select this checkbox, they specify that any prompts that are defined for the embedded analysis are to be displayed at runtime. Displaying prompts at runtime allows users to filter the embedded analysis.

In the illustration below, the analysis ReportWithPrompts displays the Account Name inline prompt at runtime. The custom web tab configuration page displays the new checkbox Display Report Prompts for the Type=Report. At runtime, when the custom web tab is displayed, the user is prompted first to select the value(s) for the Account Name prompt and then the analysis is filtered using the prompt's values.



STEPS TO ENABLE

There are no steps required to enable the feature.

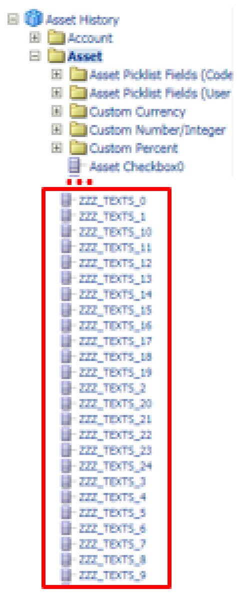
TIPS AND CONSIDERATIONS

- » The setting in the Display Report Prompts check box takes precedence over any filters that are defined in the Parameters field. Therefore, if the Display Report Prompts checkbox is selected then any filters that are defined in the Parameters field are ignored, even if no prompts are defined for the embedded analysis

Ability to Report on Assets Short Text Fields 46 to 70 in Analytics

Starting with Release 39, the following subject areas expose the short text fields 46 to 70, in the Asset dimension:

- Asset History
- Assets
- Service Request History



The Assets short text fields 46 to 70 are exposed in the following subject areas:

- Asset History
- Assets
- Service Request History

STEPS TO ENABLE

There are no steps required to enable the feature.

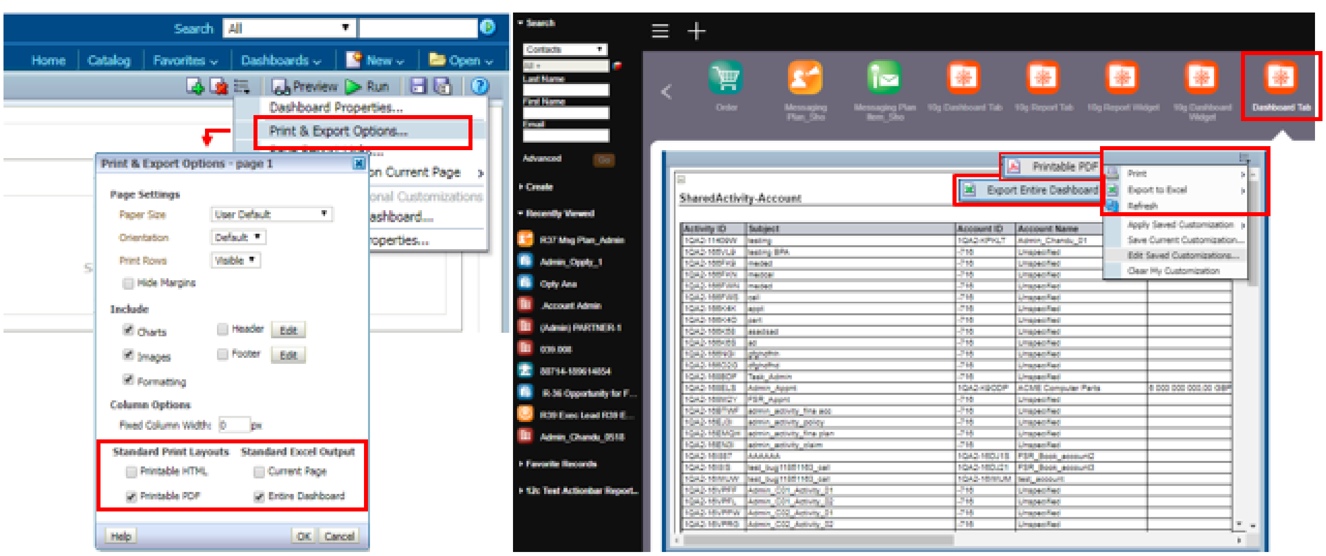
TIPS AND CONSIDERATIONS

None

Ability to Select and Display Option Links when Embedding V3 Reports and Dashboards

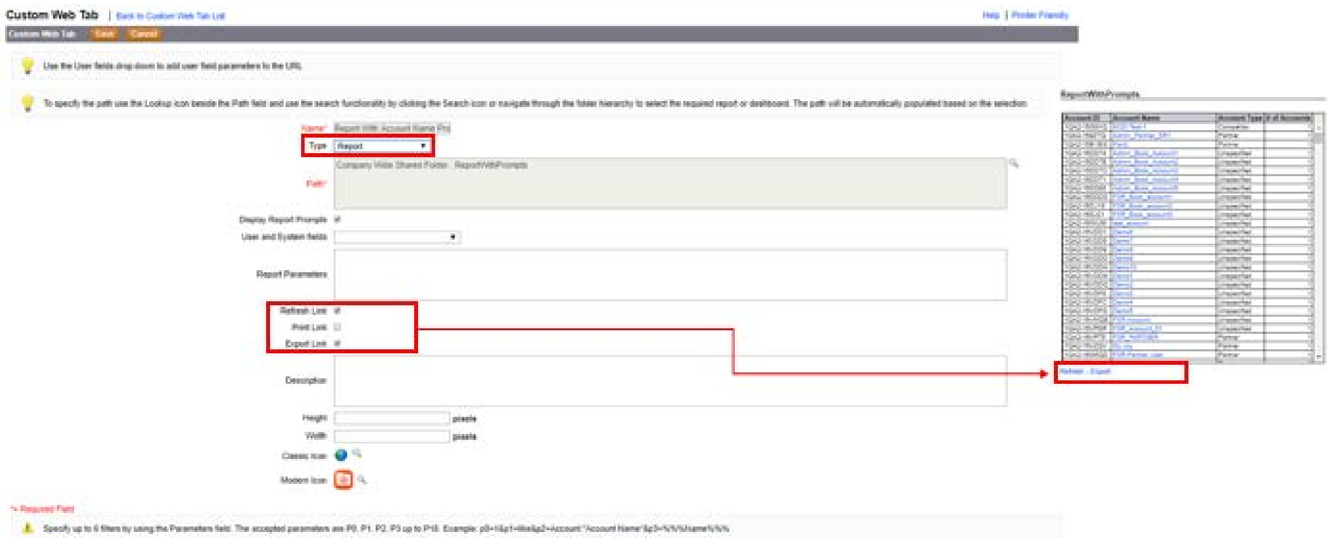
Starting with Release 39, the Page Options icon is shown at the top of the embedded dashboards. Using the Refresh option of the Page Options menu, users can now refresh all the analyses contained in the dashboard. The dashboard authors enable the Print and Export options of the Page Options menu in the Dashboard Builder. If the Print or Export options are enabled, users can print or export the entire dashboard or a dashboard page from an embedded dashboard.

In the illustration below, the Shared Activity dashboard is embedded in a custom web tab. The options available in the Page Options menu are Refresh (not configurable), Printable PDF and Export Entire Dashboard. The options Printable HTML and Export Current Page are not available because they are not selected in the Print & Export Options dialog by the dashboard author.



In addition, the Administrators can specify in homepage reports and custom web tabs, applets, report widgets or web links of Type=Report, which links should be displayed underneath the embedded analysis by selecting the appropriate checkboxes Refresh, Print or Export Link. By default, the checkboxes are displayed as selected.

In the illustration below, the ReportWithPrompts analysis is embedded in a custom web tab. The Refresh and Export links are available for the embedded analysis because the Administrator selected them in the custom web tab page. The Print Link is not selected in the custom web tab page therefore the Print link is not displayed underneath the embedded analysis.



STEPS TO ENABLE

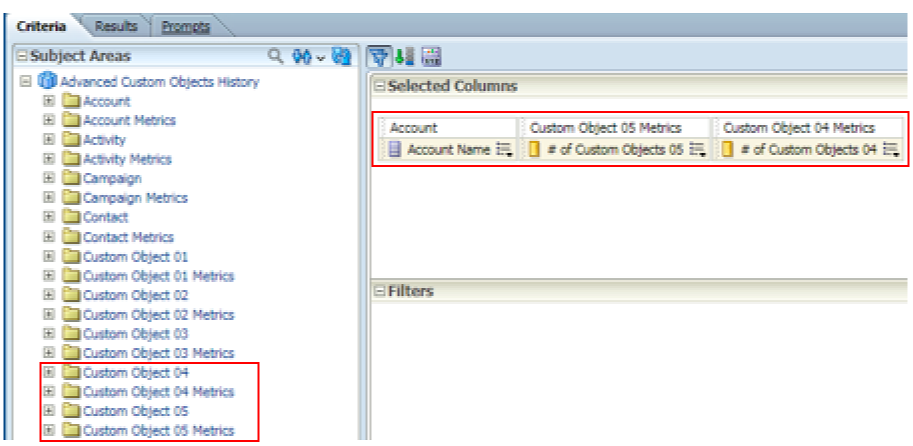
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

Add CO04..05 Dimensions to Advanced Custom Object Historical Subject Area

In Release 39, the Custom Objects 04 and 05 dimensions and their corresponding metrics are exposed in the Advanced Custom Objects History subject area in addition to Account, Campaign, Contact, Custom Object 01 to 03, Opportunity and Service Request dimensions and their metrics that were exposed in Release 38.



STEPS TO ENABLE

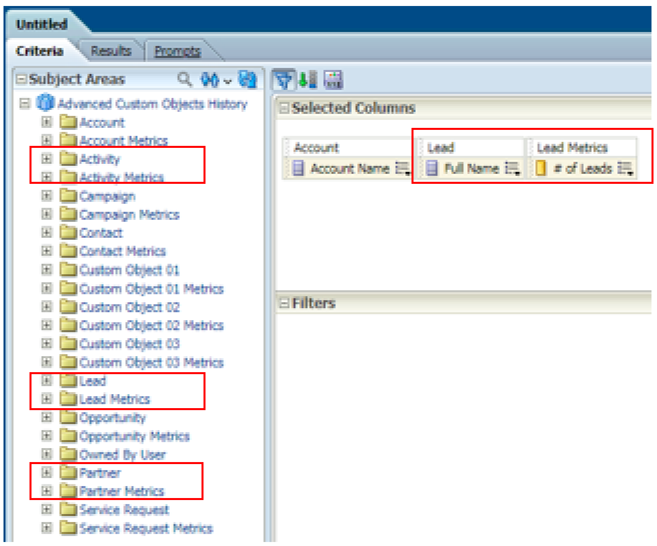
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

Add Lead, Activity and Partner Dimensions in Advanced Custom Objects Historical Subject Area

In Release 39, the Lead, Activity and Partner dimensions and the associated metrics are exposed in the Advanced Custom Objects History subject area as well.



STEPS TO ENABLE

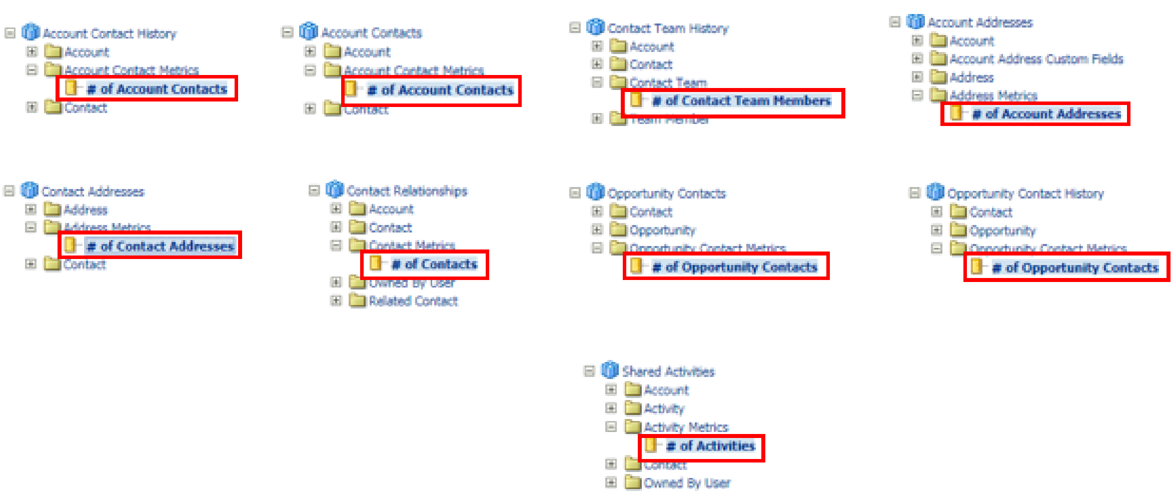
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

Add Missing Metrics to All Analytics Subject Areas

Before Release 39, the subject areas shown in the illustration below did not have any metrics. Starting with Release 39, the metrics below are added so that all the Analytics subject areas have at least one metric available.



STEPS TO ENABLE

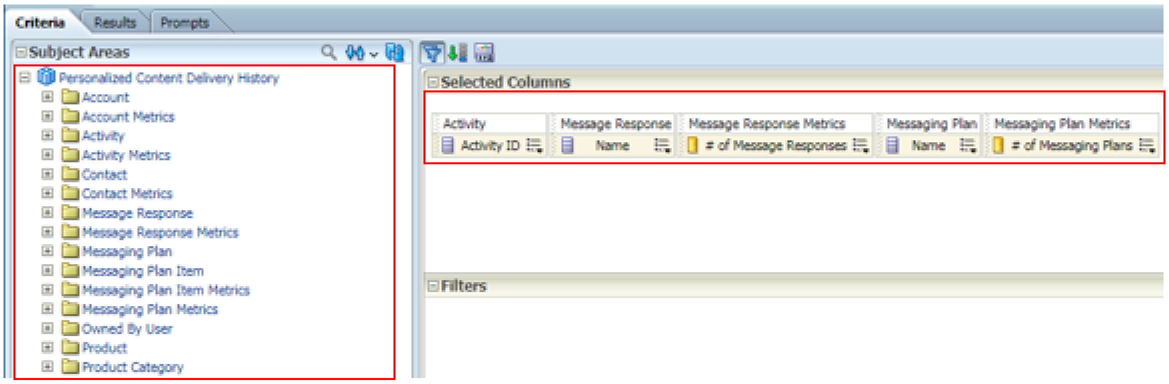
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

Add Personalized Content Delivery Subject Area for Historical Reporting

In Release 39, the new Personalized Content Delivery History subject area is added in Analytics Historical, so users can report on Personalized Content Delivery with better and improved performance. The illustration below shows a report built on Personalized Content Delivery History subject area using Activity, Messaging Plan and Message Response dimensions and the associated metrics.



STEPS TO ENABLE

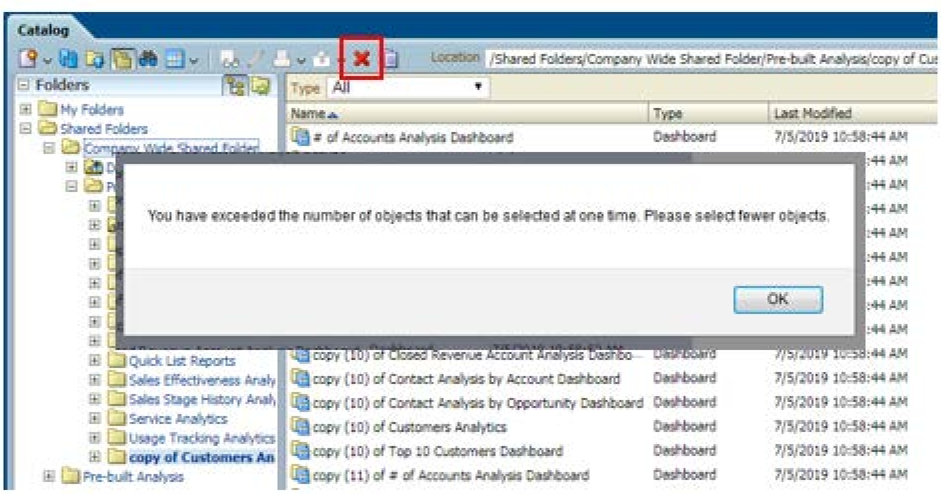
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

Add User Friendly Error Message for Bulk Copy, Move and Delete Operations in Analytics Catalog

Starting with Release 39, the error message “You have exceeded the number of objects that can be selected at one time. Please select fewer objects.” is displayed when users select multiple objects to be deleted/copied or moved in bulk and the combined length of the object names (including path) exceeds Oracle CRM On Demand limit. Before Release 39, the error message was “The requested operation has encountered an error”.



STEPS TO ENABLE

1. There are no steps required to enable the feature.

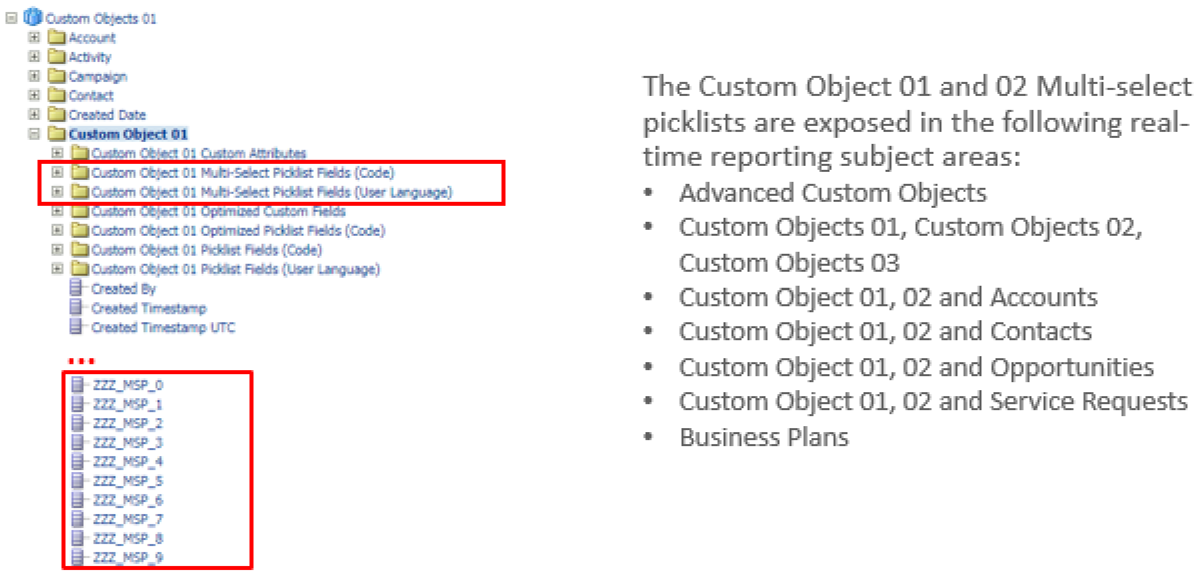
TIPS AND CONSIDERATIONS

None

Expose CO01..02 Multi-select Picklists in Real-time Analytics

Starting with Release 39, Analytics supports real-time reporting of the Multi-select picklists values of Custom Object 01 and 02 objects. Analytics supports reporting of the Multi-select picklists values in the company's default language, displayed as the language independent codes (LIC) when adding fields from the Language Independent Code (LIC) folder and in the user's language when adding fields from the User Language folder. The Custom Object 01 and 02 Multi-select picklists are exposed in the following real-time reporting subject areas:

- Advanced Custom Objects
- Custom Objects 01
- Custom Objects 02
- Custom Objects 03
- Custom Object 01, 02 and Accounts
- Custom Object 01, 02 and Contacts
- Custom Object 01, 02 and Opportunities
- Custom Object 01, 02 and Service Requests
- Business Plans



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

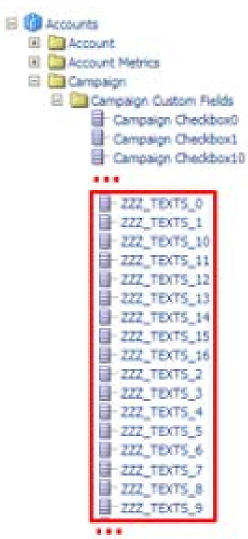
» For optimum performance, when defining filters use the Language Independent Code (LIC) Multi-select picklist values

Expose Missing Text Fields from Campaign Object in Analytics

Starting with Release 39, the following subject areas expose the short text fields 46 to 70, in the Campaign dimension:

- Account History
- Account and Competitor History
- Account and Partner History
- Account and Related Account History
- Activity History
- Advanced Custom Objects History

- Call Activity History
- Campaign History
- Campaign Response History
- Contact History
- Lead History
- MDF Request History
- Opportunity Product Revenue History
- Opportunity and Competitor History
- Opportunity and Partner History
- Opportunity History
- Accounts
- Accounts and Competitors
- Accounts and Partners
- Accounts and Related Accounts
- Account Revenues
- Activities
- Advanced Custom Objects
- Campaigns
- Contacts
- Custom Object 01,02,03 and Accounts
- Custom Object 01,02,03 and Contacts
- Custom Object 01,02,03 and Opportunities
- Custom Objects 01,02,03
- Leads
- Opportunities
- Opportunities and Competitors
- Opportunities and Partners
- Opportunity Product Revenues



The Campaign short text fields 46 to 70 are exposed in the following subject areas:

- Account History
- Account and Competitor History
- Account and Partner History
- Account and Related Account History
- Activity History
- Advanced Custom Objects History
- Call Activity History
- Campaign History
- Campaign Response History
- Contact History
- Lead History
- MDF Request History
- Opportunity Product Revenue History
- Opportunity and Competitor History
- Opportunity and Partner History
- Opportunity History
- Accounts
- Accounts and Competitors
- Accounts and Partners
- Accounts and Related Accounts
- Account Revenues
- Activities
- Advanced Custom Objects
- Campaigns
- Contacts
- Custom Object 01,02,03 and Accounts
- Custom Object 01,02,03 and Contacts
- Custom Object 01,02,03 and Opportunities
- Custom Objects 01,02,03
- Leads
- Opportunities
- Opportunities and Competitors
- Opportunities and Partners
- Opportunity Product Revenues

STEPS TO ENABLE

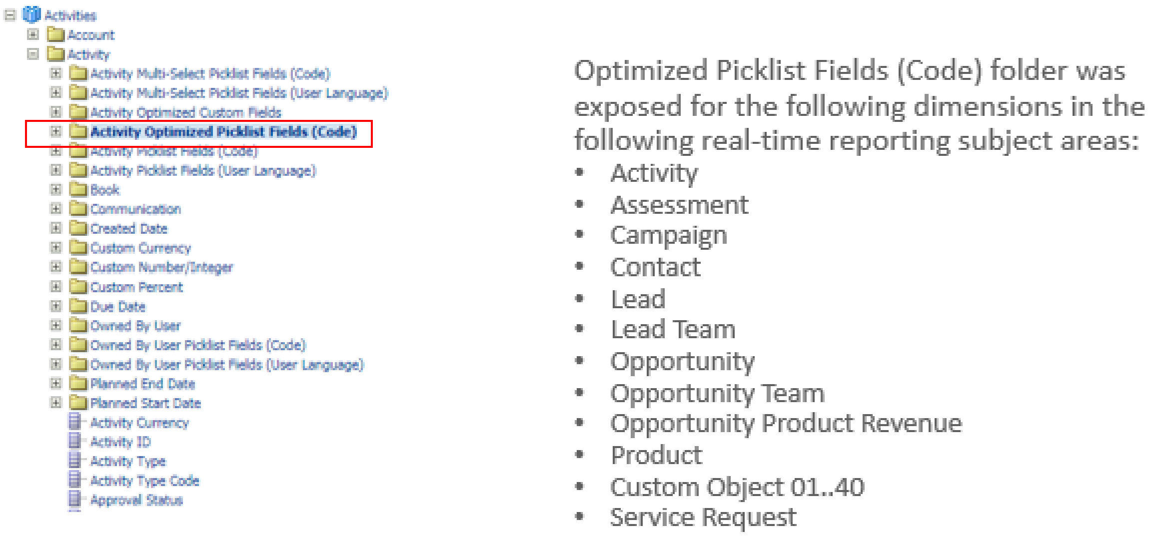
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

Expose Optimized Picklists Code Values in Real-Time Reporting Subject Areas

In Oracle CRM On Demand, the optimized picklists are available on a number of objects like: Account, Account Team, Activity, Assessment, Campaign, Contact, Custom Objects 1-40, Lead, Lead Team, Opportunity, Opportunity Team, Product, Revenue, Service Request and Service Request Team. The real-time reporting subject areas expose only the optimized picklist labels in company language but not the optimized picklist code fields, except for the Account object where the Account Optimized Picklist Fields (Code) folder was exposed in Release 38. The optimized picklist code fields can be used in reports filters to improve performance. In Release 39, all real-time reporting subject areas for the remaining of the objects that support optimized custom picklist fields expose the Optimized Picklist Fields (Code) folders. NOTE: The Service Request Team subject area does not exist therefore no optimized picklist code fields were exposed.



STEPS TO ENABLE

There are no steps required to enable the feature.

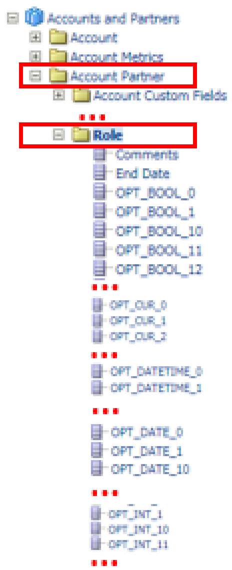
TIPS AND CONSIDERATIONS

None

Map Custom Fields in Account Partner and Opportunity Partner History and Reporting Subject Area

With Release 39, Oracle CRM On Demand enables Administrators to create optimized custom fields for Opportunity Partner and Account Partner objects. The following optimized custom fields can be created: 20 Checkbox, 10 Currency, 20 Date, 20 Date / Time, 20 Integer, 20 Number, 10 Percent, 10 Phone, 50 Picklist, 20 Text (Long) and 50 Text (Short). The new fields are exposed in Analytics, in the Role folder in the following subject areas:

- Account and Partner History
- Opportunity and Partner History
- Accounts and Partners
- Opportunities and Partners



The Account Partner and Opportunity Partner optimized custom fields are exposed in the (existing) Role folder of the following subject areas:

- Account and Partner History
- Opportunity and Partner History
- Accounts and Partners
- Opportunities and Partners

The subject areas above expose the following optimized custom fields:

- 20 Checkbox
- 10 Currency
- 20 Date
- 20 Date / Time
- 20 Integer
- 20 Number
- 10 Percent
- 10 Phone
- 50 Picklist
- 20 Text (Long)
- 50 Text (Short)

STEPS TO ENABLE

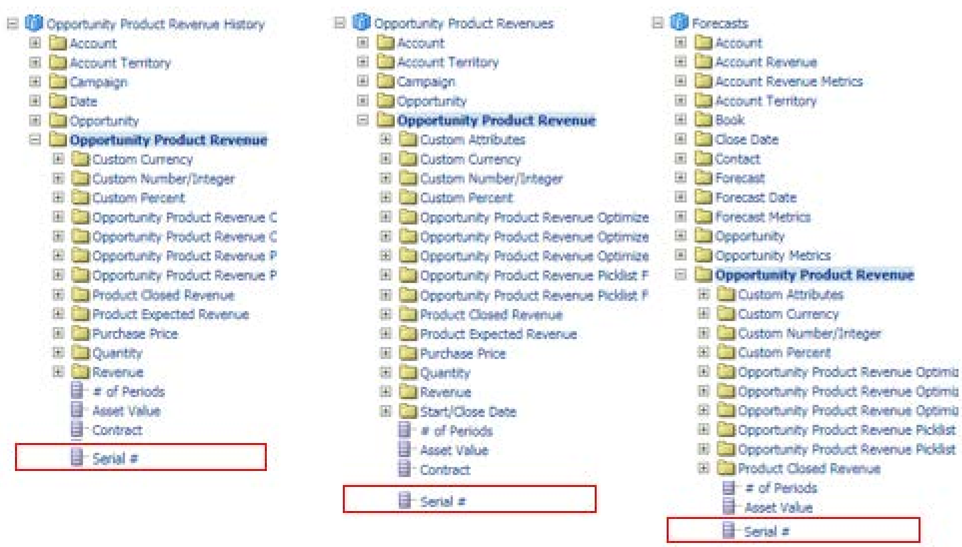
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

Map Missing Field "Serial #" in Opportunity Product Revenue

Starting with Release 39, the Opportunity Product Revenue History, Forecasts and Opportunity Product Revenue subject areas expose the Serial # field in the Opportunity Product Revenue dimension.



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

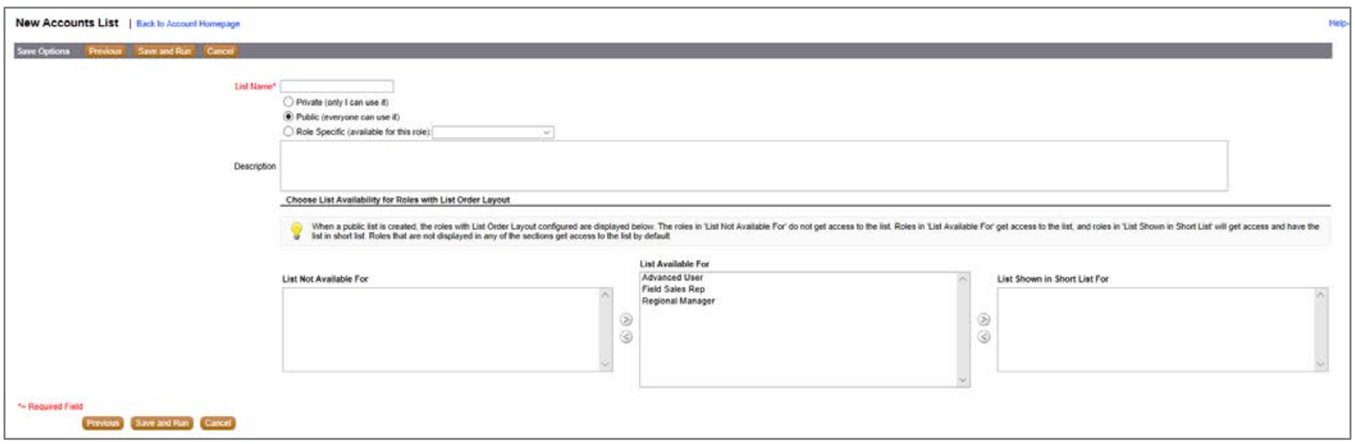
None

Application Customization

Ability for the System Administrator to Make Lists Visible to All Roles

Prior to Release 39, when a user creates a public list of a record type, the list will not be available by default to roles having List Access and Order layout configured. After creating the public list, the user has to navigate to the List Access and Order layout for each role and make the list available to those roles. This feature introduces a new section Choose List Availability for Roles with List Order Layout in the list save page, where the user who creates a public list can select one or more roles to which the list is made available. It should be noted that if the record type does not have list order layouts configured for any roles, then the new list would be immediately available to all roles, and hence the list save page will not have the new section to assign the list to roles.

The user can keep the roles in the shuttle window ‘List Available For’ and save the list, to make the list available for the roles. It should be noted that other roles for which a list order layout is not configured, would get access to the list by default. Before saving the list, user can move one or more roles to the shuttle window ‘List Shown in Short List For’ to make the list available for the role and make it available in the short list for that role. Similarly, user can move a role to the shuttle window ‘List Not Available For’ to make the list unavailable for the role.



STEPS TO ENABLE

1. In the upper-right corner of any page, click Admin.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. In the Role Management section, click Role Management.
4. Click Edit link on any role.
5. In Step 4 of Role Management wizard, select the privilege Manage Role Lists Order.
6. Click Finish to save the role.

TIPS AND CONSIDERATIONS

- » The section Choose List Availability for Roles with List Order Layout will be rendered in the list save page only if the user is creating a public list and if List Access and Order layout is available for any roles and if the user has the following privileges.
  - Manage Public Lists and (Customize Application or Manage Role Lists Order).
- » While refining the public list, the new section will be available only if the user is saving the list with a different name.

Ability to Create Custom Fields for Opportunity Partner and Account Partner

Prior to Release 39, the record types Account Partner and Opportunity Partner did not support new field creation. With this feature, the company administrator can create new fields for Account Partner and Opportunity Partner record types, via the field management page. The Company Administrator can add the newly created custom fields on page layouts. Users can also create cascading picklists for Account Partner and Opportunity Partner record types, using custom picklist fields created.

STEPS TO ENABLE

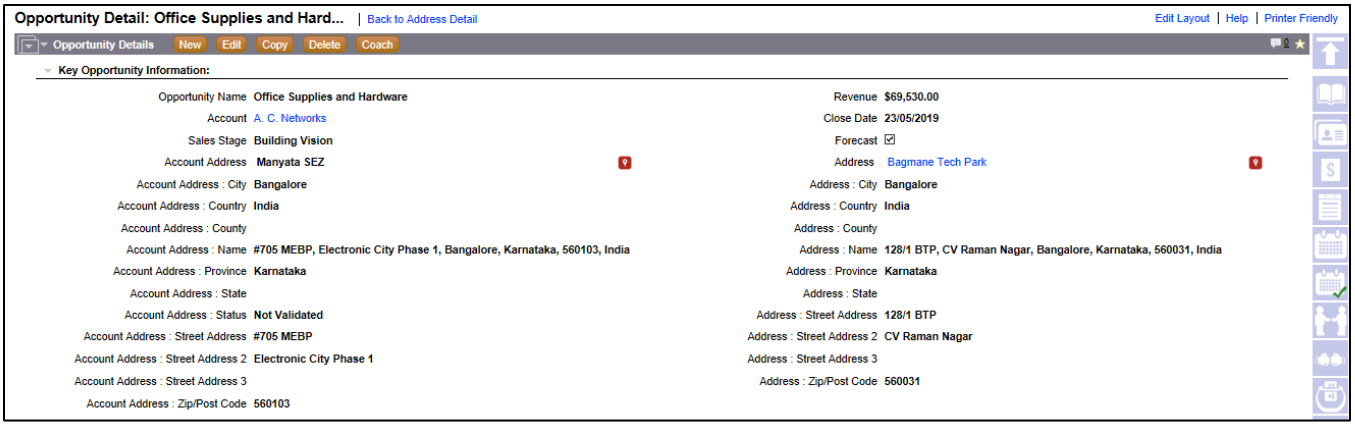
1. In the upper-right corner of any page, click Admin.
2. In the Application Customization section, click Application Customization.
3. In the Record Type Setup section, click Account /Opportunity.
4. In the Field Management section, click Account Partner Field Setup / Opportunity Partner Field Setup.
5. Click New Field button to create custom fields.

TIPS AND CONSIDERATIONS

None

Add Addresses to Opportunity and Make It Available on Maps

This feature introduces two new sets of address fields in Opportunity record type – namely the Account address and Address (Opportunity address). Account address allows users to select one of the addresses associated with the Opportunity Account. The Opportunity address allows users to select any address from the address records. This helps to capture the address of the opportunity if the address is not same as the Account's address. The newly exposed address fields are not available on Opportunity page layouts by default. However, company administrators can add the address fields on opportunity pages and save the layout. Users can also view the addresses on map by clicking the map icon adjacent to the address picker field.



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 Opportunity.
4. In the Page Layout Management section, click Opportunity Page Layout.
5. Click Edit on any of the page layout.
6. In Step 3 of Page Layout Wizard, move the Account Address field and Address field from Available Opportunity Fields to any of the sections on the right.
7. Click Finish to save the layout.

TIPS AND CONSIDERATIONS

None

Make Advanced Search Default Sort Optional

Prior to Release 39, the application automatically selects a sort field when a user creates a new list or performs an advanced search for a single record type. Users can optionally clear the sort field and select up to three sort fields for the new list or the search.

This feature introduces a new setting Auto-Populate Sort Field in New List and Advanced Search in Search Layouts, which will be selected by default. If users do not want the default sort field to be automatically selected in the New List and Advanced Search pages for a record type for a given role, then users can deselect the Auto-Populate Sort Field in New List and Advanced Search check box in the search layout that you assign to that role for the record type.

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 any record type.
4. In the Search and List Layout Management section, click the Record Type Search Layout.
5. Click Edit on any of the search layout.
6. In Step 2 of the Search Layout wizard, deselect the checkbox Auto-Populate Sort Field in New List and Advanced Search.

TIPS AND CONSIDERATIONS

None

Connected Mobile Sales

Mark Tasks as Completed Directly from the Task List Page

When a user performs a touch and hold gesture from a Task List page in Connected Mobile Sales, the user will be presented with a Mark as Completed option if the Task status does not have a value of Completed. When selecting this option, the task status value is updated immediately from the Task List page.

STEPS TO ENABLE

1. User needs to be running the latest Connected Mobile Sales client.

TIPS AND CONSIDERATIONS

None.

Provide Edit Option for a Record via Sliding on List Pages

From a List Page, users can now perform a slide gesture from right to left to display an Edit option. When selected, the user is taken directly to the record's Edit Detail page.

STEPS TO ENABLE

None. This is automatically available when upgraded to CMS Server 1.4.27.

TIPS AND CONSIDERATIONS

None

Synchronize Recently Viewed Records Between CMS and CRM On Demand

The Recently Viewed List between CMS and CRM On Demand are now synchronized so that they display the same records.

STEPS TO ENABLE

None. This is automatically available when upgraded to CMS Server 1.4.27.

TIPS AND CONSIDERATIONS

When a user is using CRM On Demand, the user needs to terminate the session by logging out of the application, or wait for the session to time out.

Once the user's CRM On Demand session has ended, when the user logs into CMS, the client will automatically synchronize the Recently Viewed Items from CRM On Demand.

If the user's CRM On Demand session has not ended before signing into CMS, the Recently Viewed Items from CRM On Demand will NOT synchronize to CMS until the CRM On Demand session has ended and either:

a) CMS performs an auto sync which occurs every 10 minutes

OR

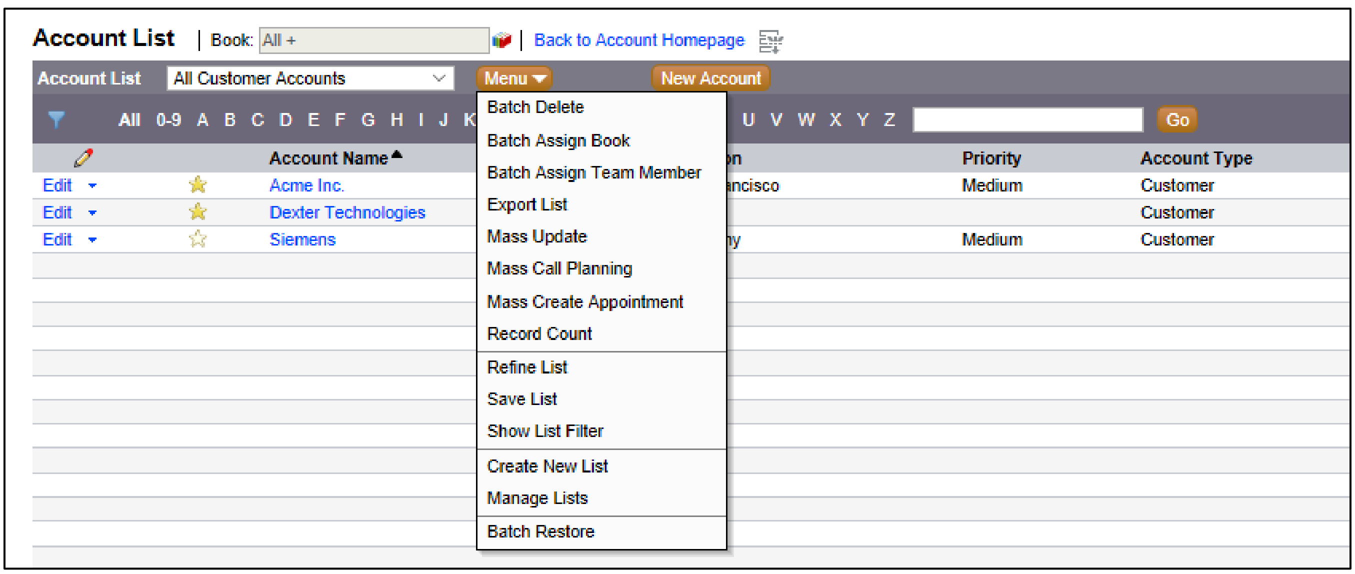
b) The user manually performs a sync by pressing the sync icon, which can be performed every 5 minutes

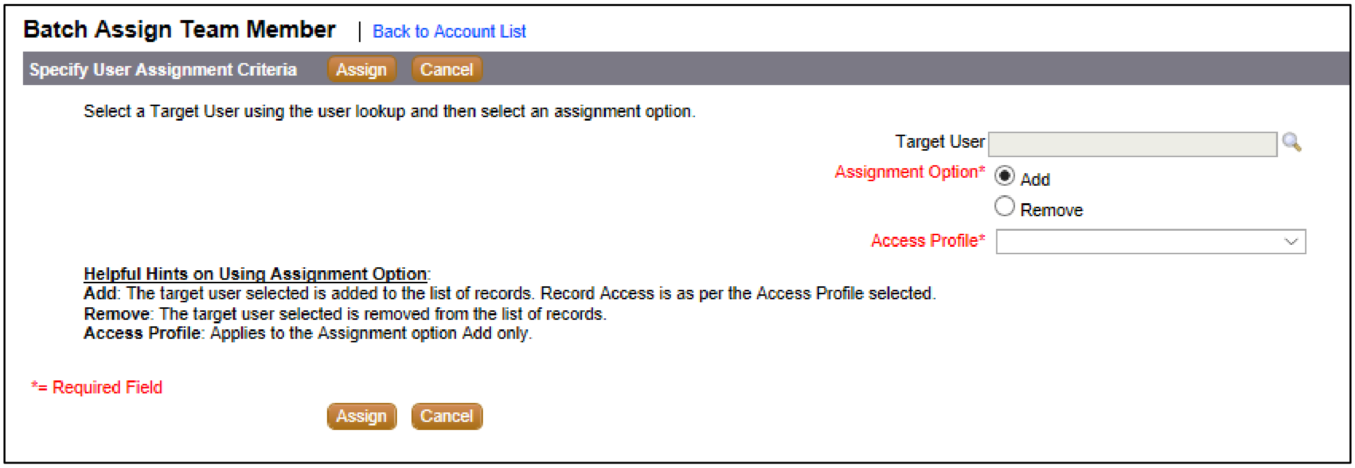
Usability

Ability to Assign Team User to List of Records

This feature allows users to add a selected user to a list of records and to remove users from a list of records via a newly introduced list menu option Batch Assign Team Member. Users can navigate to a list and select the Batch Assign Team Member option in Menu. In the Batch Assign Team Member page, users can select the target user and then select the Add or Remove option. If the user is adding the target user to the list of records, then user has to select the Access Profile of the target user before proceeding with the batch request.

The batch request can be tracked via the Batch Assign Request Queue page, which will now display both 'Batch Book assign requests' and 'Batch Team Member assign' requests depending on user privilege. The application sends an automated email to the user, on completion of the batch assign request.





STEPS TO ENABLE

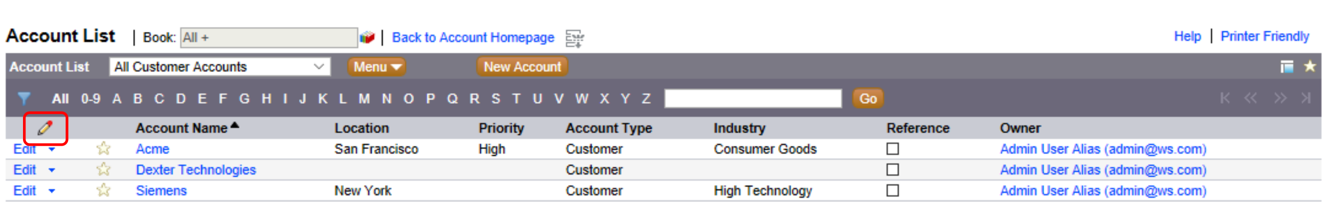
1. In the upper-right corner of any page, click Admin.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. In the Role Management section, click Role Management.
4. Click Edit link on any role.
5. In Step 4 of Role Management wizard, select the privilege, Batch Assign Team Member.
6. Click Finish to save the role.

TIPS AND CONSIDERATIONS

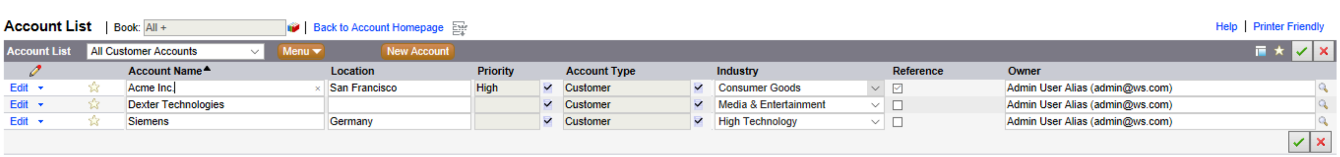
None

Ability to Edit Multiple List Records at a Time

This feature allows users to edit multiple list records on the screen, just as you update the cells in a Microsoft excel sheet. Most of the editable fields on the record can be edited in this fashion and the changes can be saved at a time. If the Administrator has selected the existing company profile setting Inline Edit Enabled, then the application displays a pencil icon on the header row of lists, as shown below.



On clicking the pencil icon, most of the editable field types on all the list records visible in the page open in editable mode. Users can change the values on the screen and click the green tick mark to save the records.



STEPS TO ENABLE

1. In the upper-right corner of any page, click Admin.
2. In the Company Administration section, click Company Administration.
3. In the Company Profile section, click Company Profile.
4. In the Company Settings section, select the checkbox, Inline Edit Enabled.

5. Click Save.

TIPS AND CONSIDERATIONS

None

Ability to Keep a Disabled Picklist Value on Record During Update

This feature allows users to update a record with the already selected disabled picklist value maintained and not deleted from the record.

STEPS TO ENABLE

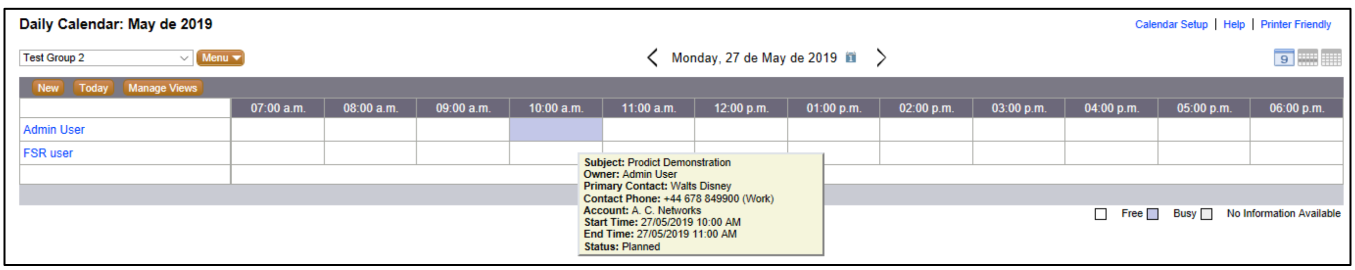
1. In the upper-right corner of any page, click Admin.
2. In the Company Administration section, click Company Administration.
3. In the Company Profile section, click Company Profile.
4. In the Company Settings section, select the checkbox, Keep Disabled Picklist Value on Update.
5. Click Save.

TIPS AND CONSIDERATIONS

- The Keep Disabled Picklist Value on Update option applies only to editing any picklists or multi-select picklists via user interface and to editing any multi-select picklist via Import Assistant. For all other channels, such as Web Services, disabled values are always maintained on the record until a new active value is selected.

Display Account, Contact Phone, Activity Status Information in Group Calendar

In Group Calendar, the tooltip on appointments displays the appointment details. In this release, we have enhanced the tooltip on Group Calendar appointment to display Account associated with the appointment, primary contact's phone number and the status of appointment.



STEPS TO ENABLE

1. In the upper-right corner of any page, click My Setup.
2. In the Calendar Setup section, click Calendar Settings.
3. Click Default Calendar View.
4. In the Appointment Information Preferences section, select the checkboxes Account Name, Status and Contact Phone.
5. Click Save.

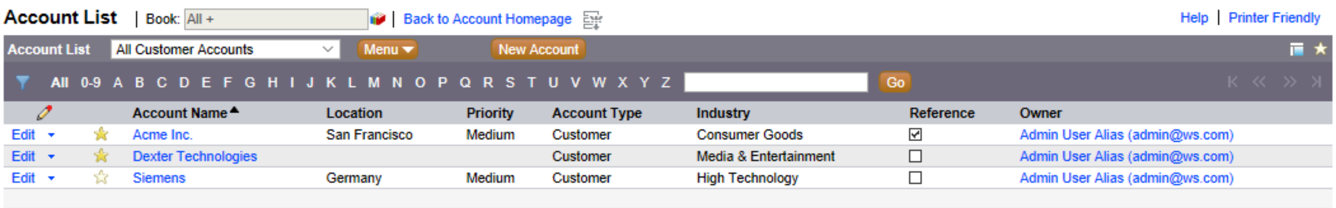
TIPS AND CONSIDERATIONS

None

Managing Favorite Records from List of Records

Prior to Release 38, users could mark a record as favorite from the record detail page only. This feature allows users to mark and unmark records as favorites from a list of records. The functionality is supported in top lists, child full lists and search results.

In lists, there will be a star icon against each record on the left of the first column displayed. The icon will be grey if the record is not marked as a favorite. Users can click on the grey star icon to add the record to favorites. The icon will then be highlighted, indicating that the record is now a favorite record. If users click on the highlighted star icon again, the record will be removed from the favorites list and the icon changes to grey. This allows users to quickly mark and unmark multiple records as favorites, and eliminates the need to navigate to the detail page of each record to mark records as favorites.



STEPS TO ENABLE

The feature is readily available to users.

TIPS AND CONSIDERATIONS

None

Feature Name in Title Case

Enter the description here.

STEPS TO ENABLE

1. In the upper-right corner of any page, click My Setup.
2. In the Calendar Setup section, click Calendar Settings.

TIPS AND CONSIDERATIONS

None

Web Services

Expose Audit Trail as a Child Object in Web Services v2.0

Audit Trail is now exposed as a child object for all objects with audit trail support and Web Services v2.0 support.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Support Sorting for Field Management Administrative Area

Field Management Administrative Web Service API as well as Field Management area in the migration tool has been enhanced to support sorting by field name, modified date and created date.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Web Services Support for Custom Web Applets, Web Tabs, Web Links with V3 Analytics Content

Starting with Release 39, Administrators can now configure Web Applets, Web Tabs or Web Links with V3 Analytics Content using administrative Web Services and the Migration Tool. The new types Report and Dashboard have now support via Web Services and with the Migration Tool. In addition there is support also for the checkboxes Display Report Prompts, Refresh Link, Print Link and Export

Link which are introduced in UI as part of the features “Ability to Provide Values for Analyses Prompts in Embedded Analyses” and “Ability to Select and Display Option Links when Embedding V3 Reports and Dashboards”.

The following administrative Web Services are now updated to support V3 Analytics Content:

- Custom Web Link
- Custom Web Tab
- Action Bar Custom Web Applet (NOTE: There is no support for the Display Report Prompts checkbox with this Web Service)
- Detail Page Custom Web Applet
- Home Tab Custom Web Applet
- Homepage Custom Web Applet

STEPS TO ENABLE

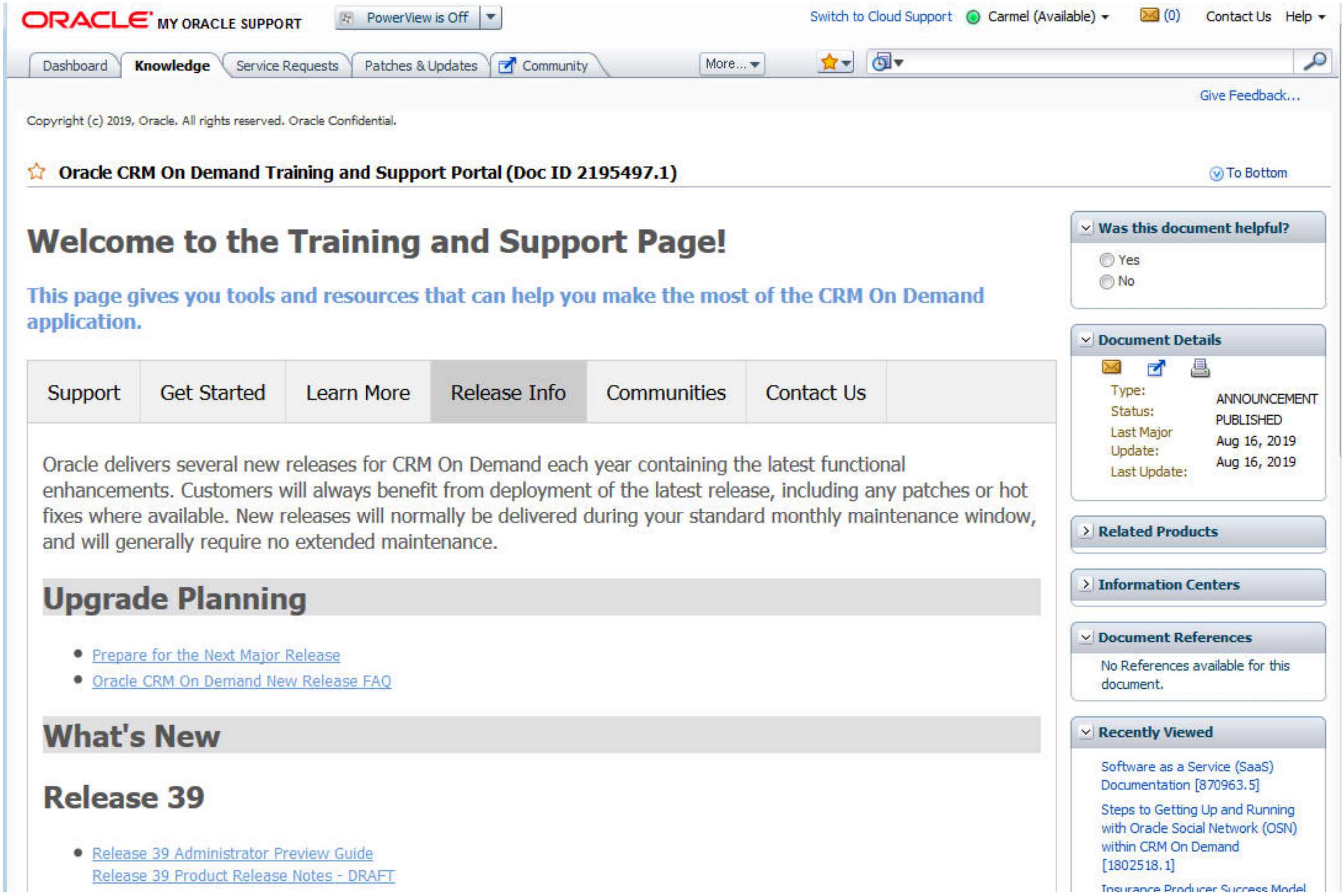
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

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.



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 39 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 39 questions or issues.

Call the toll-free number for your location to contact CRM On Demand Customer Care:

- **United States:** 1-800-223-1711
- **China:** 86-800-810-0366
- **India:** 1-800-4258-448 (BSNL Toll Free), or 000117 (AT&T Toll Free, then enter 8007111005 after voice prompt)
- **Japan:** 120-099638
- **United Kingdom:** 44-870-4000-900

Other Countries
If your country is not listed above, please refer to the Oracle Support Contacts Global Directory. Click the 'Submit a Service Request' link.

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.

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

Worldwide Inquiries
Phone: +1.650.506.7000
Fax: +1.650.506.7200

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