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**CRM ON DEMAND**

# Administrator Preview Guide

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**Release 40**

March 2020  
VERSION 20200305

An abstract graphic composed of overlapping, semi-transparent geometric shapes in shades of red and grey. The shapes create a sense of depth and movement, with some areas appearing to be in the foreground and others receding into the background. A faint grid pattern is visible in the background.

**ORACLE**

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## Document Versioning

Date	Version	Change Reference
January 31, 2020	20200131	First draft published.
March 5, 2020	20200305	Final version 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
<b>Administration</b>				
Ability to Format Fields in Audit Trail to Respect User Locale		✓		
Allow Only Active Currencies on Records		✓		
Increase User Password Minimum Length		✓		
<b>Analytics</b>				
Ability to Report on the Amount of Time a User Was Logged In				✓
Add "Change List View Type" Drop-Down to Open, Save and Select BI Content for Analytics Dialogs				✓
Add Action Object to the Type Drop-down in the Catalog Search and Homepage Search				✓
Add Lead, Opportunity and Account Dimensions in Events Historical Subject Area				✓
Add Validation for Parameters Field on Analytics Web Related Integrations				✓
Create Account Team Subject Area in Real-time Analytics				✓
Create Contact Team Subject Area in Real-time Analytics				✓
Create Lead Team Subject Area in Historical Analytics				✓
Create Service Request Team Subject Areas in Analytics				✓
Cross-Subject Area Reporting in Analytics		✓		
Default Data Viewing Property to Content Paging in Views				✓
Expose Distributor Field and Other Missing Fields in Opportunity Related Subject Areas				✓
Expose Missing Fields in Personalized Content Delivery Real-time Subject Area				✓
Keep Dashboard Prompt Values when Navigating Back to the Dashboard from Oracle CRM On Demand Detail Page				✓
Remove Join with Exchange Rate when Reporting using Multiple Dimensions and Rate Info is not needed				✓
Updates on Team History and Real Time Subject Areas to Make Them Consistent				✓

Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
<b>Application Customization</b>				
Ability to Configure Default Sort on Account's Asset Related Information				✓
Enable the Ability to Alpha-Order Picklists				✓
Global Cascading Picklist				✓
<b>Connected Mobile Sales</b>				
Provide Additional Options for a Record via Sliding on List Pages			✓	✓
<b>Usability</b>				
Ability to Add New Values & Set Blank Values to Multi-Select Picklists via Import			✓	✓
Ability to Export Attachments on Dealer Object				✓
Ability to Merge up to 5 Records				✓
Allow for Commenting in Expression Builder				✓
Multi-Row Inline Edit Support for Dynamic Layout and Special Field Types				✓
<b>Web Services</b>				
Expose ListOfAssignedBooks in User Web Service v2.0				✓
Graphical User Interface Based Migration Tool				✓

## Administration

### Ability to Format Fields in Audit Trail to Respect User Locale

Currently, when a field, such as of type date, is audited, the value of the field is not displayed in the audit trail in the format of the user's locale. A new company profile setting, Enable Audit Trail Fields to Respect User Locale, is introduced. When enabled, any audit trail fields will be displayed in the audit trail with the values formatted as per the user's locale.

#### 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

» This setting applies to the following field types: numbers, currencies, phone numbers, times, and dates.

### Allow Only Active Currencies on Records

For all the record types, any inadvertent update of currency code to an inactive currency can be prevented.

#### STEPS TO ENABLE

1. Select the Company Profile setting 'Prevent Web Service Updates of Inactive Currencies' checkbox.

#### TIPS AND CONSIDERATIONS

None.

### Increase User Password Minimum Length

Administrators can now specify minimum password length for all users to be between 6 and 30.

#### STEPS TO ENABLE

1. Navigate to Company Administrator -> Sign In and Password Control.
2. Change the Minimum Password Length to any value between 6 through 30.

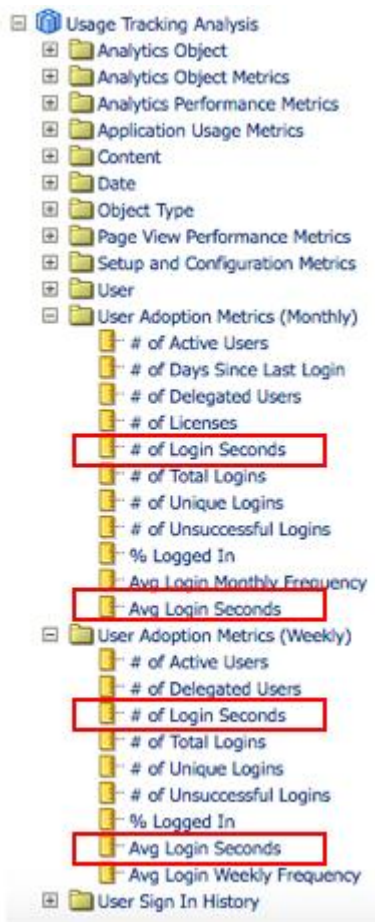
#### TIPS AND CONSIDERATIONS

Changing Minimum Password Length may force users to reset the passwords.

## Analytics

### Ability to Report on the Amount of Time a User Was Logged In

With Release 40, the # of Login Seconds and Average Login Seconds metrics are added to the Usage Adoption Metrics both Monthly and Weekly of the Usage Tracking Analysis subject area. Users can report on the number of seconds a user was logged in during a given month or week as well as on the average number of seconds. The newly added metrics can be combined with any column from the Date and/or User dimension.



#### STEPS TO ENABLE

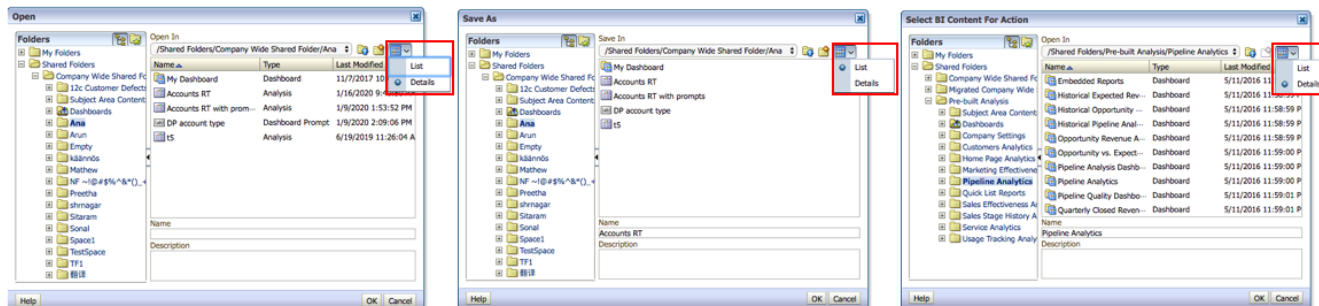
There are no steps required to enable the feature.

## TIPS AND CONSIDERATIONS

- » In Oracle CRM On Demand, there are instances when the session records do not have a value in the Sign Out Time field. These records are excluded from the calculation, because the duration of these sessions cannot be calculated

### Add “Change List View Type” Drop-Down to Open, Save and Select BI Content for Analytics Dialogs

Starting with Release 40, users can switch from List to Details view in some of the Analytics dialogs like Open, Save As, Select BI Content For Action, Select Action, Save Action and Save Action As, by using the “Change List View Type” drop-down. Before Release 40, the “Change List View Type” drop-down was available only from the Catalog menu icons. Also, before Release 40, the objects in these dialogs were displayed using only the List view option. By using the Details view option, the users can now to sort by Name, Type and/or Last Modified Date attributes of the Analytics objects.



## STEPS TO ENABLE

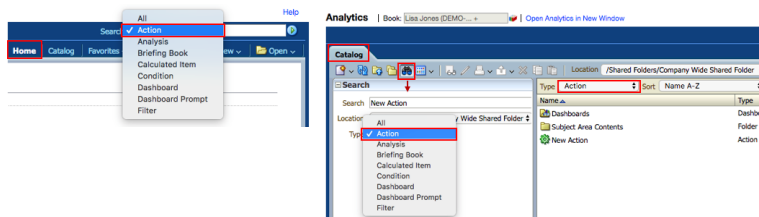
There are no steps required to enable the feature.

## TIPS AND CONSIDERATIONS

None.

### Add Action Object to the Type Drop-down in the Catalog Search and Homepage Search

Starting with Release 40, the Action object type has been added for search in the Analytics Homepage Search and Catalog Search dropdowns, so users can now search for actions objects that are saved in the Catalog.



## STEPS TO ENABLE

There are no steps required to enable the feature.

## TIPS AND CONSIDERATIONS

None.

### Add Lead, Opportunity and Account Dimensions in Events Historical Subject Area

In Release 36, the Account, Lead and Opportunity dimensions were added to the Events Real-time subject area. In Release 40, this feature adds the Account, Lead and Opportunity dimensions in Event History subject area. In addition, the # of Accounts for Event, # of Leads for Event and # of Opportunities metrics were added to the Event metrics.





## STEPS TO ENABLE

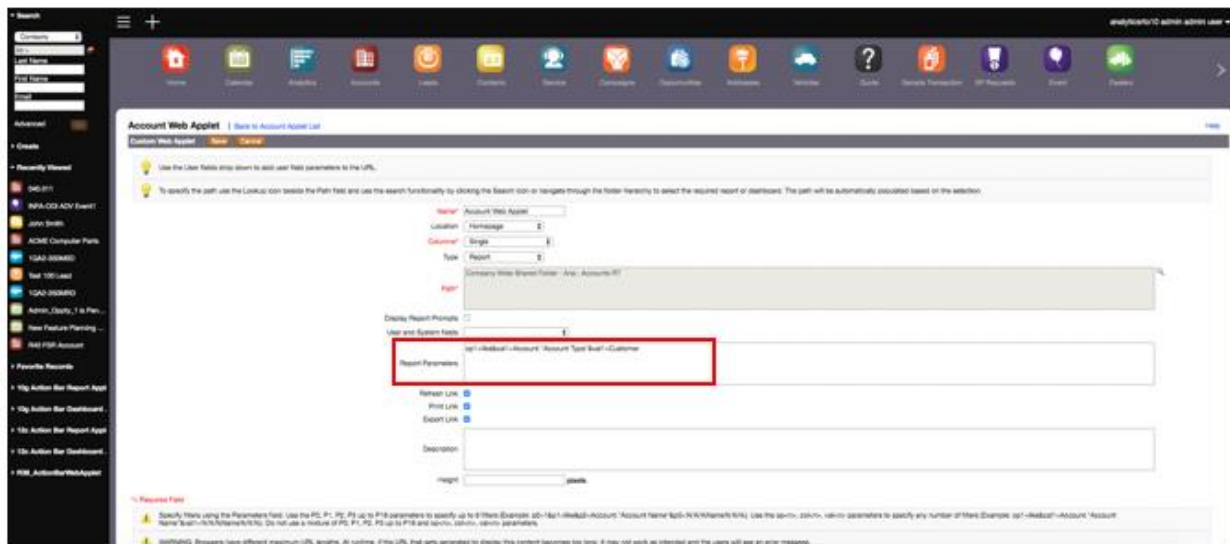
There are no steps required to enable this feature.

## TIPS AND CONSIDERATIONS

None.

## Add Validation for Parameters Field on Analytics Web Related Integrations

Starting with Release 40, the Parameters field from the setup pages for custom Web applets, Web tabs, Web links of type Report or Dashboard, or Send Email actions of the workflow scheduler with Analytics content is now validated, and users will receive error messages if the Parameters field is incorrectly specified. In addition, the Parameters field is now validated also when the custom Web applets, Web tabs, Web links of type Report or Dashboard are rendered in UI, and when the Send Email actions of the workflow schedulers with Analytics content are executed, at runtime. The Parameters field accepts the pre-existing P<n> syntax which includes P0 to P18 parameters allowing a maximum of 6 filters. The Parameters field also accepts a newer syntax: op<n>=operator& col<n>=Table Name.Column&val<n>=Value that no longer limits the number of filters to 6. In addition, for dashboards, the Page parameter can be added to specify the dashboard page to navigate to, when the embedded dashboard is displayed.



## STEPS TO ENABLE

There are no steps required to enable this feature.

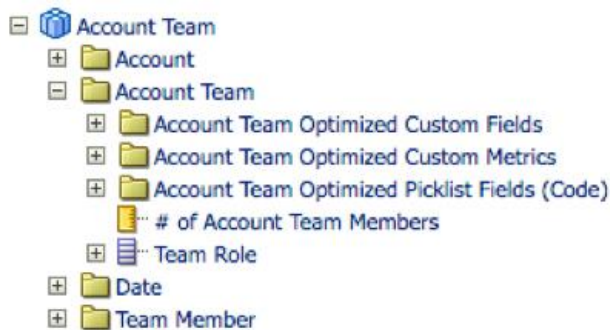
## TIPS AND CONSIDERATIONS

- » If a table name, column name, value, or dashboard page name that is specified in the Parameter field includes any of the following characters, then the character must be encoded, as follows:
  - » % (percent sign). Encode as %25
  - » & (ampersand). Encode as %26
  - » [ (left bracket). Encode as %5B
  - » ] (right bracket). Encode as %5D
  - » + (plus sign). Encode as %2B
- » If these characters are not encoded, then an error might be returned when users try to save the parameters, or the results might not be correct at run time.

### Create Account Team Subject Area in Real-time Analytics

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Starting with Release 40, the new Account Team subject area has been added, to allow users to report in real-time on accounts and the team members involved in an account. This is a many-to-many subject area and is available in all editions of Oracle CRM On Demand. This subject area always uses the Team Visibility mode regardless of which settings are defined in the user's profile or in the company profile. For that reason, a user can always report on all the accounts where a user is either the owner or a team member.



## STEPS TO ENABLE

There are no steps required to enable this feature.

## TIPS AND CONSIDERATIONS

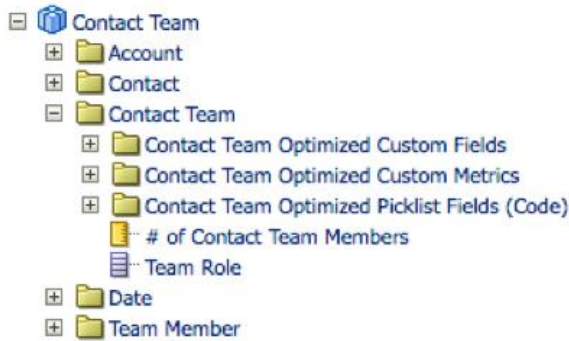
None.

### Create Contact Team Subject Area in Real-time Analytics

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Starting with Release 40, the new Contact Team subject area has been added, to allow users to report in real-time on contacts and the team members involved in a contact. This is a many-to-many subject area and is available in all editions of Oracle CRM On Demand. This subject area always uses the Team Visibility mode regardless of which settings are defined in the user's profile or in the company profile. For that reason, a user can always report on all the

contacts where a user is either the owner or a team member.



#### STEPS TO ENABLE

There are no steps required to enable this feature.

#### TIPS AND CONSIDERATIONS

None.

### Create Lead Team Subject Area in Historical Analytics

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Starting with Release 40, the new Lead Team History subject area has been added, to allow users to report in Historical Analytics, on leads and the team members involved in a lead. This is a many-to-many subject area and is available in all editions of Oracle CRM On Demand. This subject area always uses the Team Visibility mode regardless of which settings are defined in the user's profile or in the company profile. For that reason, a user can always report on all the leads where a user is either the owner or a team member.



#### STEPS TO ENABLE

There are no steps required to enable this feature.

#### TIPS AND CONSIDERATIONS

None.

### Create Service Request Team Subject Areas in Analytics

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Starting with Release 40, the new Service Request Team History and Service Request Team subject areas have been added, to allow users to report on service requests and the team members involved in a service request. These are many-to-many subject areas and are available in all editions of Oracle CRM On Demand. These subject areas always use the Team Visibility mode regardless of which settings are defined in the user's profile or in the company profile. For that reason, a user can always report on all the service requests where a user is either the owner or a

team member.



## STEPS TO ENABLE

There are no steps required to enable this feature.

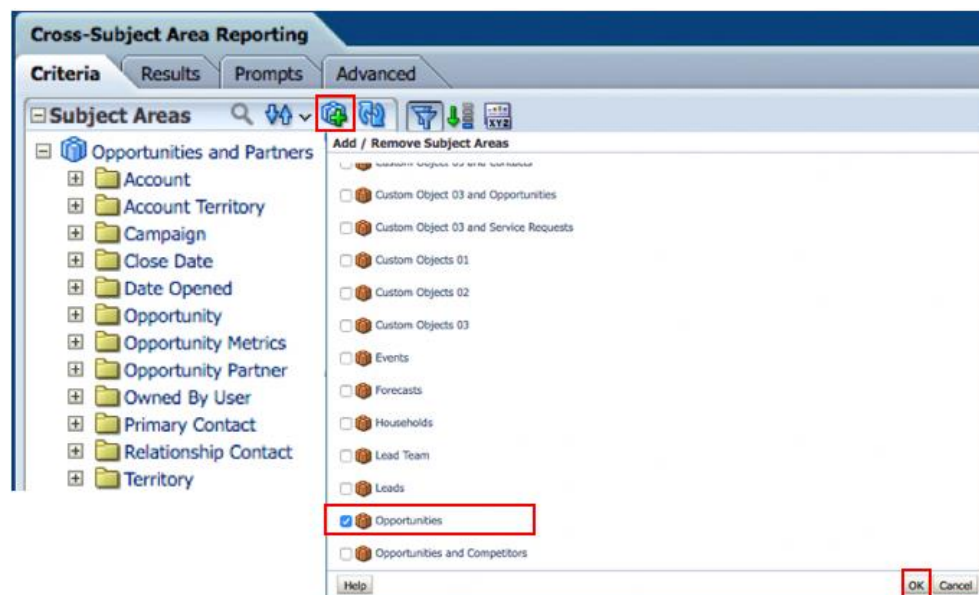
## TIPS AND CONSIDERATIONS

None.

## Cross-Subject Area Reporting in Analytics

If the analysis requirements cannot be met by any single subject area, users can create an analysis that combines information from two or more subject areas. Before Release 40, users could create combined analyses using the Set operations.

With Release 40, users can now join two or more subject areas using this feature. The Cross-Subject Area Reporting feature is enabled by a new privilege in Analytics, named Cross-Subject Areas Analytics privilege. At the time of the upgrade the privilege is not enabled, but Admins can enable it for experienced users that can take advantage of this powerful feature. When this feature is enabled, a new icon “Add / Remove Subject Areas” is displayed in the Criteria and Results tabs of an analysis. When clicking the icon, the Add / Remove Subject Areas pop-up gets displayed, and users can select additional **related** subject areas and click OK to add them to the analysis. The first subject area selected when an analysis is first created is referred to as the **primary** subject area.



When an analysis that combines multiple subject areas is generated, separate queries are executed for each subject area in the analysis and the results are merged to generate the final analysis. The data that is returned from the

different subject areas is merged using the **common** dimensions. A **common** dimension is a dimension that is available in all of the subject areas that are to be combined. A **local** dimension is a dimension that is available in one or more of the subject areas but is not available in all of them. Users can include columns from local dimensions as well as columns from common dimensions in a combined analysis. In addition, users must include a metric from the primary subject area and a metric from each of the related subject areas in the combined analysis.

If users selected columns from both local dimensions as well as columns from common dimensions, after adding the columns and metrics to the analysis, users click on Advanced tab and select the Dimensionality check box and click Apply SQL. Then users click on Results tab to see the results of the combined analysis.

**Cross-Subject Area Reporting**

Criteria Results Prompts **Advanced**

**SQL Issued**

The following box contains the SQL code that will be sent to the Oracle BI Server when this analysis is executed.

```
SET VARIABLE PREFERRED_CURRENCY='USD',ENABLE_DIMENSIONALITY=1;SELECT
0 s_0,
"Opty-Product Lists (RT05)". "Opportunity - Product". "EFFECTIVE_DT" s_1,
"Opty-Product Lists (RT05)". "Opportunity - Product". "Probability %" s_2,
"Opty-Product Lists (RT05)". "Product". "Name" s_3,
"Partner - Opportunity Lists". "Account". "Account ID" s_4,
"Partner - Opportunity Lists". "Account". "Account Name" s_5,
"Partner - Opportunity Lists". "Opportunity". "Name" s_6,
"Partner - Opportunity Lists". "Opportunity". "Opportunity ID" s_7,
"Partner - Opportunity Lists". "Partner Account". "Account ID" s_8,
"Partner - Opportunity Lists". "Partner Account". "Account Name" s_9,
"Opty-Product Lists (RT05)". "Opportunity-Product Metrics". "# of Products" s_10,

```

**Advanced SQL Clauses**

DIMENSIONALITY ☒ Show Total value for all measures on unrelated dimensions.

**Apply SQL**

If users selected columns from common dimensions only, then users do not need to navigate to Advanced tab and to enable the dimensionality variable.

If users did not enable the dimensionality value and applied the SQL when using local dimensions, or if users did not add metrics from all the subject areas involved in the analysis, users might experience ODBC errors or get incorrect results. Users can also get incorrect results when they combine subject areas for which there are no relationships defined at the subject area level. In such cases, users can create combined analyses using Set operators instead.

For step-by-step instructions on how to combine multiple subject areas in a single analysis, users can refer to Online Help topic: Example of Combining Multiple Subject Areas in a Single Analysis.

## 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 Cross-Subject Areas Analytics privilege.
6. Click Finish to save the role.

## TIPS AND CONSIDERATIONS

- » Users can combine a real-time subject area with other real-time subject areas, and users can combine an historical subject area with other historical subject areas. Users cannot combine a real-time subject area with an historical subject area
- » Users must include a metric from the primary subject area and a metric from each of the related subject areas in the combined analysis. Users do not have to display the metrics or use them, but they must include them. Users can hide a metric if the metric is not needed in the analysis



- » To make sure that the results for all of the subject areas are at the same granular level, users must include at least one column from at least one common dimension in the combined analysis. When users select columns from a common dimension, users must select only columns that are available in the same dimension in all of the subject areas. In some cases, a dimension that is common to two or more subject areas might not contain the same set of columns in each of the subject areas. In such cases, it is recommended that users select only columns that are available in the common dimension in all of the subject areas
- » When selecting columns from a common dimension, users must select all of the columns from a single subject area
- » If users select columns from one or more local dimensions as well as columns from one or more common dimensions, then users must enable the dimensionality variable for the query, so that the query will return the total value for the selected measures. If users select columns from common dimensions only, then users do not need to enable the dimensionality variable

## Default Data Viewing Property to Content Paging in Views

Before Release 40, the default Data Viewing setting on Table Views, Pivot Table Views and Trellis Views was Fixed headers with scrolling content. Starting with Release 40, the default setting is the Content Paging setting, which is equivalent with the default Data Viewing setting in V2 Analytics.

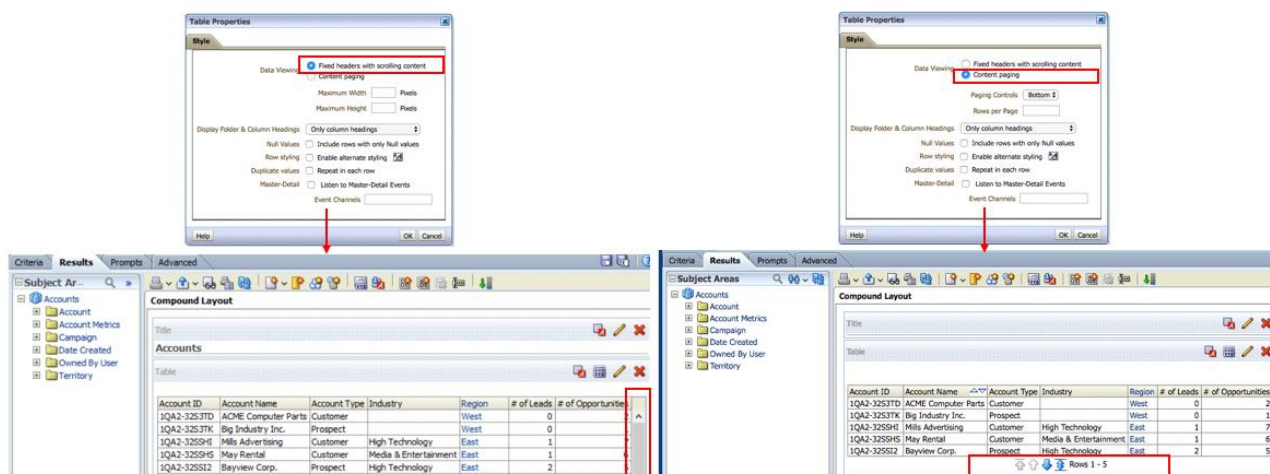


Image: Default Option before Release 40

Image: Default Option in

Release 40

## STEPS TO ENABLE

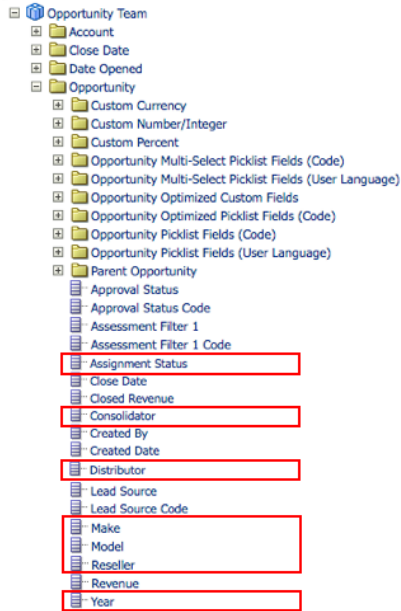
There are no steps required to enable this feature.

## TIPS AND CONSIDERATIONS

None.

## Expose Distributor Field and Other Missing Fields in Opportunity Related Subject Areas

In Release 40, the Assignment Status, Consolidator, Distributor, Make, Model, Reseller and Year (Model Year) fields are exposed in all subject areas having the Opportunity dimension, under the Opportunity folder. In the left-side illustration, the Opportunity Team subject area having the Opportunity dimension has the fields exposed under the Opportunity folder. The historical and real-time subject areas having the Opportunity dimension are listed on the right.



### Historical Analytics Subject Areas

- Activity History
- Advanced Custom Objects History
- Call Activity History
- Deal Registration History > Associated Opportunity
- Deal Registration Product Revenue History > Associated Opportunity
- Lead History
- Opportunity and Competitor History
- Opportunity and Partner History
- Opportunity Contact History
- Opportunity History
- Opportunity Product Revenue History
- Opportunity Team History
- Pipeline History
- Product History
- Quote History
- Sales Stage History
- Service Request History
- Special Pricing Product History

### Real-time Reporting Subject Areas

- Activities
- Advanced Custom Objects
- Assessments
- Business Plans
- Custom Objects 01..03 and Opportunities
- Custom Objects 01..03
- Events
- Forecasts
- Leads
- Opportunities
- Opportunities and Competitors
- Opportunities and Partners
- Opportunity Contacts
- Opportunities Product Revenues
- Opportunities Team
- Orders
- Quotes
- Service Requests
- Special Pricing Products

### STEPS TO ENABLE

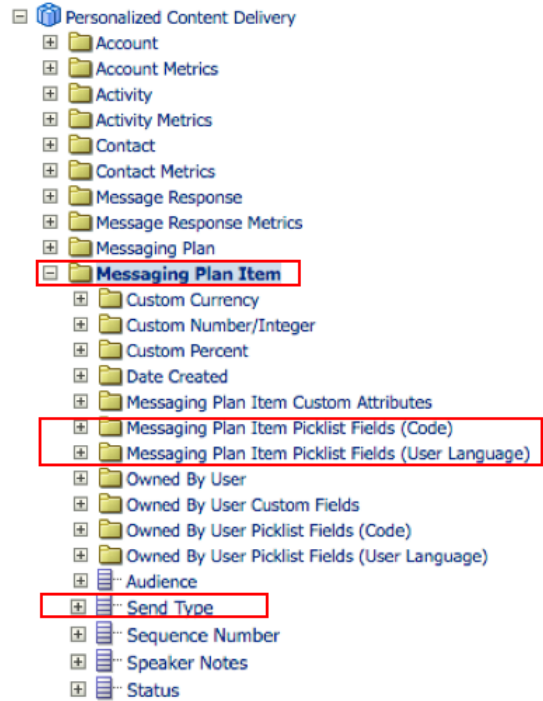
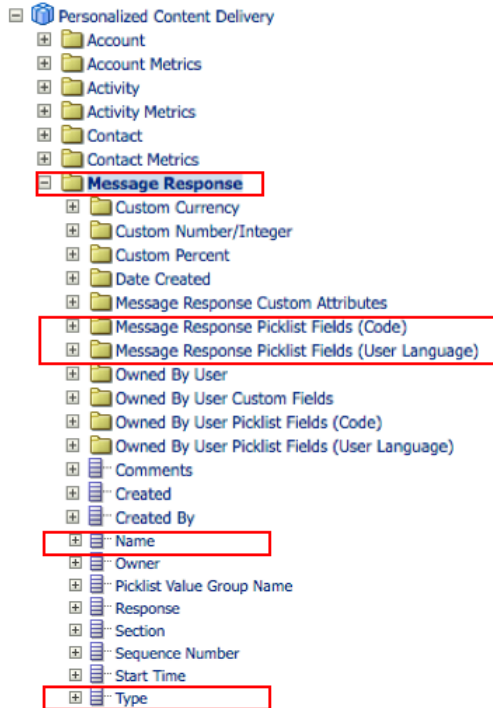
There are no steps required to enable this feature.

### TIPS AND CONSIDERATIONS

None.

### Expose Missing Fields in Personalized Content Delivery Real-time Subject Area

In Release 40, the Personalized Content Delivery Real-time subject area was added with the missing fields. The Message Response Picklist Fields (Code) and Message Response Picklist Fields (User Language) folders along with Name and Type fields were added to Message Response folder. The Messaging Plan Item Picklist Fields (Code) and Messaging Plan Item Picklist Fields (User Language) folders along with Send Type field were added to Messaging Plan Item folder.



## STEPS TO ENABLE

There are no steps required to enable this feature.

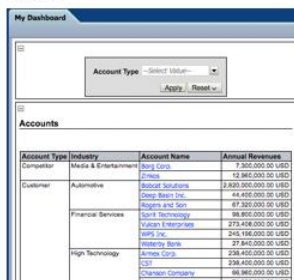
## TIPS AND CONSIDERATIONS

None.

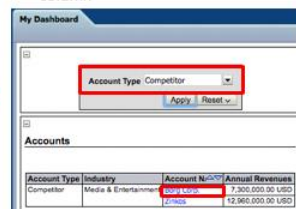
## Keep Dashboard Prompt Values when Navigating Back to the Dashboard from Oracle CRM On Demand Detail Page

Before Release 40, the dashboard prompt values were lost and the analyses results were not filtered, when a user returned to the dashboard from the Oracle CRM On Demand Detail page to which user navigated using the analyses action links. Before Release 40, the user had to re-enter the dashboard prompt values and filter again the analyses results, to be able to click on another record's action link to navigate to another Oracle CRM On Demand Detail page. Starting with Release 40, the dashboard prompts are kept when returning from the Oracle CRM On Demand Detail page, the analyses results are filtered, and users can easily choose other records on the analyses to navigate to other Oracle CRM On Demand Detail pages.

User navigates to a dashboard with dashboard prompts and embedded analysis



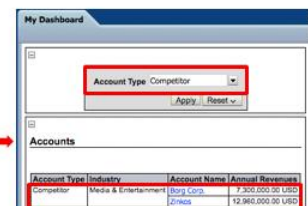
1. User enters dashboard prompt value and clicks Apply
2. In Accounts analysis, user clicks the Action Link on Account Name column



1. User navigates to Account Detail page
2. User clicks Back to Analytics



With Release 40, the dashboard prompt value is kept, and the analysis is filtered



## STEPS TO ENABLE

There are no steps required to enable this feature.



## TIPS AND CONSIDERATIONS

None.

### Remove Join with Exchange Rate when Reporting using Multiple Dimensions and Rate Info is not needed

Before Release 40, when an analysis is using multiple dimensions and non-currency fields from these dimensions, the analysis does not display the records for which there is no exchange rate defined for the month, due to an implicit join with the exchange rate table. Starting with Release 40, several subject areas were corrected therefore when an analysis is using multiple dimensions and non-currency fields from these dimensions, the analysis will no longer drop the records for which there is no exchange rate defined for the month. However, when an analysis is using multiple dimensions and fields of type currency, the analysis will still drop the records for which there is no exchange rate defined for the month.

## STEPS TO ENABLE

There are no steps required to enable this feature.

## TIPS AND CONSIDERATIONS

None.

### Updates on Team History and Real Time Subject Areas to Make Them Consistent

Starting with Release 40, the Account Team History was modified to make it consistent with the Account Team subject area:

- A new metric # of Account Team Members was added under Account Team
- The Team Role was field was relocated from Team Member folder to Account Team folder
- A new Date dimension was added, representing the Account Created Date
- Two folders Owned By User Picklist Fields (Code) and Owned By User Picklist Fields (User Language) were missing under Team Member and they were added

The Contact Team History was modified to make it consistent with the Contact Team subject area:

- The Team Role was field was relocated from Team Member folder to Contact Team folder
- A new Date dimension was added, representing the Contact Created Date
- Two folders Owned By User Picklist Fields (Code) and Owned By User Picklist Fields (User Language) were missing under Team Member and they were added

The Lead Team was modified to make it consistent with the Lead Team History subject area by adding the new metric # of Lead Team Members. The # of Opportunity Team Members metric was added under Opportunity Team folder in both Opportunity Team and Opportunity Team History subject areas.



## STEPS TO ENABLE

There are no steps required to enable this feature.

## TIPS AND CONSIDERATIONS

None.

## Application Customization

### Ability to Configure Default Sort on Account's Asset Related Information

Asset Related Information Layout for the Account record type can be defined with a default sort order. The sort order may be ascending or descending based on one of the following attributes:

- Product Name
- Serial #
- Status

#### Available Fields:

Account  
Account External ID  
Account Integration Id  
Account Location  
Asset Type  
Contract  
Created  
Created By

#### Selected Fields:

Product Name  
Serial #  
Quantity  
Type  
Status  
Purchase Date  
Purchase Price  
Notify Date

Sort by:  ☒ Ascending ☐ Descending

#### STEPS TO ENABLE

1. While modifying the Asset Related Information Layout for Account record type, specify an attribute in the 'Sort by' field.
2. Choose whether the sort order should be ascending or descending.
3. Save the Related Information Layout.

#### TIPS AND CONSIDERATIONS

- » Make sure the attribute used for sorting is also among the selected fields for the Related Information Layout.

### Enable the Ability to Alpha-Order Picklists

Picklist values may be translated to multiple languages. After translation of the picklist values, they may be arranged in alphabetically sorted order. Prior to Release 40, an administrator needed to perform the sorting for each language individually. With Release 40, this task can be performed with click of a single button.

Color	Save & Close	Save & Order Alphabetically	Save & Order Alphabetically For All Languages	Save & New	Show Disabled	Cancel
Order*	Id	Default Value	Picklist Values*	Mark for Translation		
1	<No Values>	<No Values>	Red	<input checked="" type="checkbox"/>		
2	Blue	<Custom Value>	Blue	<input checked="" type="checkbox"/>		
3	Green	<Custom Value>	Green	<input checked="" type="checkbox"/>		
4	Yellow	<Custom Value>	Yellow	<input checked="" type="checkbox"/>		
5				<input type="checkbox"/>		

#### STEPS TO ENABLE

1. The button 'Save & Order Alphabetically For All Languages' is available without any opt-in.

#### TIPS AND CONSIDERATIONS

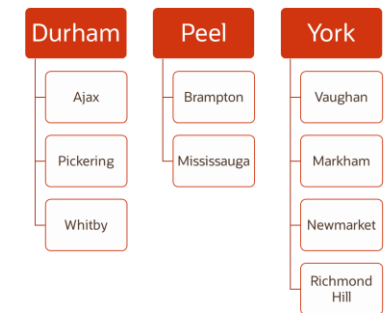
- » Before sorting alphabetically across all languages, make sure that the picklist labels are translated in all languages.

### Global Cascading Picklist

Cascading picklists can be applicable for multiple record types. The picklists can also have the same values and mappings between the parent-related picklist values. It is quite error-prone to maintain cascading picklists with same values and mappings for multiple record types.

This feature allows you to share the cascading picklists across record types, along with the mappings between the related picklists.

For instance, consider the following relationship between two picklists – Municipal Region and City.



The cascading picklist can be created for the Account record type. The mapping between the values in the parent and related picklist are specified.

Picklist Value Group	Parent Picklist Available Values	Related Picklist Available Values	Related Picklist Displayed Values
pvg2 pvg1	<No Values> Durham Peel York	<No Values> Ajax Pickering Whitby Mississauga Brampton	Vaughan Markham Richmond Hill Newmarket

The cascading picklist can be shared with Contact record type, using the 'Enable Shared Cascading Picklist' checkbox.

Picklist Value Group	Parent Picklist Available Values	Related Picklist Available Values	Related Picklist Displayed Values
pvg2 pvg1	<No Values> Durham Peel York	<No Values> Ajax Pickering Whitby Mississauga Brampton	Vaughan Markham Richmond Hill Newmarket

☒ Enable Shared Cascading Picklist

Source Record Type: Account

### STEPS TO ENABLE

1. Create the original cascading picklist on one record type.
2. For the remaining record types where the cascading picklist needs to be shared, create shared picklists that share the values from the original parent and related picklists.
3. For these record types, create the cascading picklists and select the 'Enable Shared Cascading Picklist' checkbox, so that the mappings from the original cascading picklist are replicated.

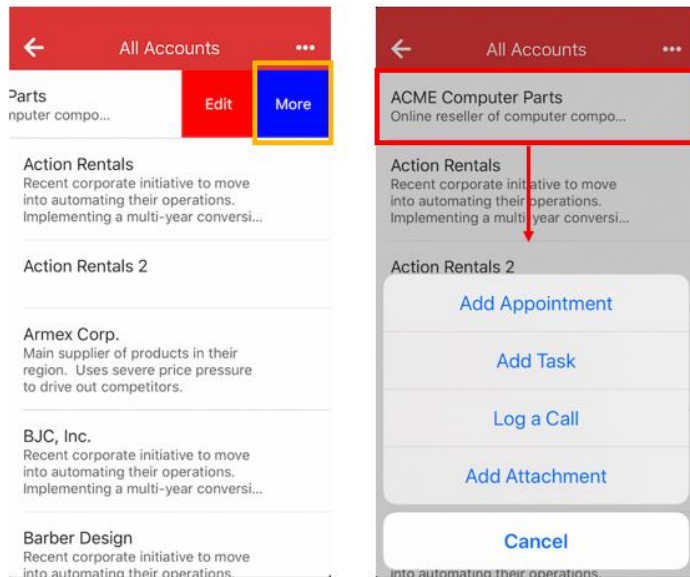
## TIPS AND CONSIDERATIONS

- » The mapping of values between parent and related picklist remain editable. If modified, they are reflected on the other cascading picklists that share these mappings.
- » The 'Enable Shared Cascading Picklist' checkbox may be unselected to modify the mappings. In this case, any change in the mappings with the original cascading picklist will not be reflected.

## Connected Mobile Sales

### Provide Additional Options for a Record via Sliding on List Pages

From any Accounts, Contacts and Opportunities list pages, users can now access the “More” option for a given record, by sliding from right to left for the record. The available options are: Add Appointment, Add Task, Log a Call and Add Attachment.



## STEPS TO ENABLE

User needs to run the latest Connected Mobile Sales client.

## TIPS AND CONSIDERATIONS

None.

## Usability

### Ability to Add New Values & Set Blank Values to Multi-Select Picklists via Import

When performing an import of values to Multi-Select picklists, users have the following options:

- add new values that haven't been defined
- setting the value to blank

## STEPS TO ENABLE

1. Navigate to Step 1 of the Import Data Wizard by selecting Admin → Import and Export Tools, selecting the object you want to import under the Import Data section, and clicking the Launch button
2. To add new values that haven't been defined, select the Add New Value To Picklist option

The import process may encounter field values that do not match the picklist values for fields in Oracle CRM On Demand. Please decide how to resolve these conflicts:

- ☒ Add New Value To Picklist  
☐ Don't Import Field Value

3. To set a value to blank, check the Import Blank Values in Multi Select Picklists option

Import Blank Values in Multi  
Select Picklists ☒

## TIPS AND CONSIDERATIONS

None.

## Ability to Export Attachments on Dealer Object

Users with the ability to export, can now choose to export attachments for the Dealer object.



☐ All Attachment Data

- ☐ Accounts  
☐ Campaigns  
☐ Custom Objects 05  
☐ Custom Objects 08  
☒ Dealers  
☐ Opportunities  
☐ Service Requests

- ☐ Activities  
☐ Contacts  
☐ Custom Objects 06  
☐ Custom Objects 09  
☐ Inventory Audit Reports  
☐ Sales Stage  
☐ Solutions

- ☐ Alerts  
☐ Custom Objects 04  
☐ Custom Objects 07  
☐ Custom Objects 10  
☐ Leads  
☐ Sample Transactions

## STEPS TO ENABLE

This feature is automatically available to those who can export records.

## TIPS AND CONSIDERATIONS

None.

## Ability to Merge up to 5 Records

Users now have the ability to merge up to 5 records. Users can choose up to 4 duplicate records to merge into the primary record by clicking the + icon beside the field to select the duplicate record. The duplicate records will be deleted on merge and will follow the same rules as if merging one duplicate record to the primary record. On step 2, users can choose from the values from any of the selected records to maintain in the primary record.

Merge Accounts | [Back to Account Detail](#)

[Help](#)

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

Step 1 of 3 : Find Accounts to Merge

Primary Account\*

Duplicate Account 1\*

Duplicate Account 2

## STEPS TO ENABLE

There are no steps required to enable this feature.

## TIPS AND CONSIDERATIONS

None

## Allow for Commenting in Expression Builder

Users now have the ability to add comments within the Expression Builder window. This can be achieved by using /\* to signify the start of a comment and \*/ to signify the end of a comment.

Check Syntax Save Cancel

Account Fields  [Show Acceptable Values](#)

Functions

```
/* Sets the default value to 999 */
999
```

[Syntax Guide](#) [Sample Expressions](#)

Check Syntax Save Cancel

This feature is automatically available for users who can access field setup pages.

None.

Users can now perform multi-row inline edit for Dynamic Layouts and the following field types:

- Address
- Concatenated fields

<b>Opportunity List</b>   <a href="#">Back to Opportunity Homepage</a> <span style="float: right;"><a href="#">Help</a>   <a href="#">Printer Friendly</a></span>									
<div> Opportunity List New List Menu New Opportunity </div>									
		<b>Opportunity Name</b>	<b>Opportunity Currency</b>	<b>Account</b>	<b>Close Date</b>	<b>Revenue</b>	<b>Sales Stage</b>		
<a href="#">Edit</a>		1000 M134 Graphics Accelerators	USD	ACME Computer Parts	24/02/2011		Short List		
<a href="#">Edit</a>		2500 Barebones with Graphics Upgrade	USD	Big Industry Inc.	17/06/2011		Qualified Lead		
<a href="#">Edit</a>		ABC Opportunity	USD	ACME Computer Parts	09/09/2015		Selected		
<a href="#">Edit</a>		CCC Opportunity	USD	ACME Computer Parts	09/09/2015		Negotiation		
<a href="#">Edit</a>		GGG Opportunity	USD	ACME Computer Parts	09/09/2015		Qualified Lead		

This feature is automatically available to those who can inline edit records.

None.

## Expose ListOfAssignedBooks in User Web Services v2.0

The ListOfAssignedBooks is now exposed in User Web Services v2.0 allowing the ability to query, update and remove the relationship with associated books assigned to a user.

There are no steps required to enable this feature.

## None

## Graphical User Interface Based Migration Tool

A new graphical user interface has been introduced for the Oracle Migration Tool On Demand. Customers can choose to use either the existing command-line or the new graphical user interface to migrate configuration data from one environment to another. The graphical user interface can be used to migrate all of the configuration areas or all of the configuration data of one or more configuration areas from one environment to another, without making any changes to the data.

The image displays two side-by-side screenshots of the Oracle Migration Tool On Demand graphical user interface. Both windows have a title bar that reads 'Oracle Migration Tool On Demand' and a navigation bar with 'Login', 'Services', 'Settings', and 'Progress' tabs. The left window is titled 'Enter information to run migration' and contains two sections: 'Source Environment Details' and 'Target Environment Details'. Each section has input fields for 'Server URL', 'UserName', and 'Password'. A checkbox labeled 'Copy login details to Target' is located between the two sections. At the bottom are 'Cancel', 'Previous', 'Next', and 'Finish' buttons. The right window shows a tree view of configuration areas to migrate, with all items checked. The tree structure is as follows: Administrative Services (checked) -> Company Administration (checked) -> Assessment Scripts (checked), Report Folders (checked), Sales Category (checked); User Management and Access Controls (checked) -> Access Profile (checked), Role Management (checked); Application Customization (checked) -> Action Bar Custom Web Applet (checked), Action Bar and Global Header Layouts (checked), Cascading Picklists (checked), Concatenated Field (checked), Custom HTML Head Tag (checked), Custom Web Link (checked), Custom Web Tab (checked), Customize Record Types (checked), Detail Page Custom Web Applet (checked), Dynamic Layout (checked), Field Audit SetUp (checked), Field Management (checked), Home Page Custom Web Applet (checked), Home Tab Custom Web Applet (checked), Homepage Layout (checked). The same navigation buttons are at the bottom.

### STEPS TO ENABLE

There are no steps required to enable this feature.

### TIPS AND CONSIDERATIONS

- » For the full functionality of the migration tool, such as upload a subset of the configuration area, use the command-line based client
- » The graphical user interface client is available as part of the same downloadable package as the command-line based client with versions for windows and other platform
- » See the Oracle Migration Tool On Demand guide for more information regarding installing and using the migration tool with either interfaces

## 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](#) [Managed Cloud](#)

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[Give Feedback...](#)

**Oracle CRM On Demand Training and Support Portal (Doc ID 2195497.1)** [To Bottom](#)

### Welcome to the Training and Support Page!

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
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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 40

- [Release 40 Administrator Preview Guide](#)
- [Release 40 Product Release Notes](#)

**Was this document helpful?**  
☐ Yes  
☐ No

**Document Details**  
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Last Update: 13-Feb-2020

**Related Products**

**Information Centers**

**Document References**  
No References available for this document.

**Recently Viewed**  
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Oracle CRM On Demand - Prepare for the Next Major Release [2196223.1]  
Information Center - Oracle Sales Cloud [1461295.2]

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

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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

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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

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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 40 features for your company, here are some excellent resources that can assist you.

## Online Help

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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

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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

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Our experienced Oracle CRM On Demand Customer Care team is ready to help you with any of your Oracle CRM On Demand Release 40 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**

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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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