ORACLE

CRM ON DEMAND

Administrator Preview Guide

Release 41

August 2020
VERSION 20200831

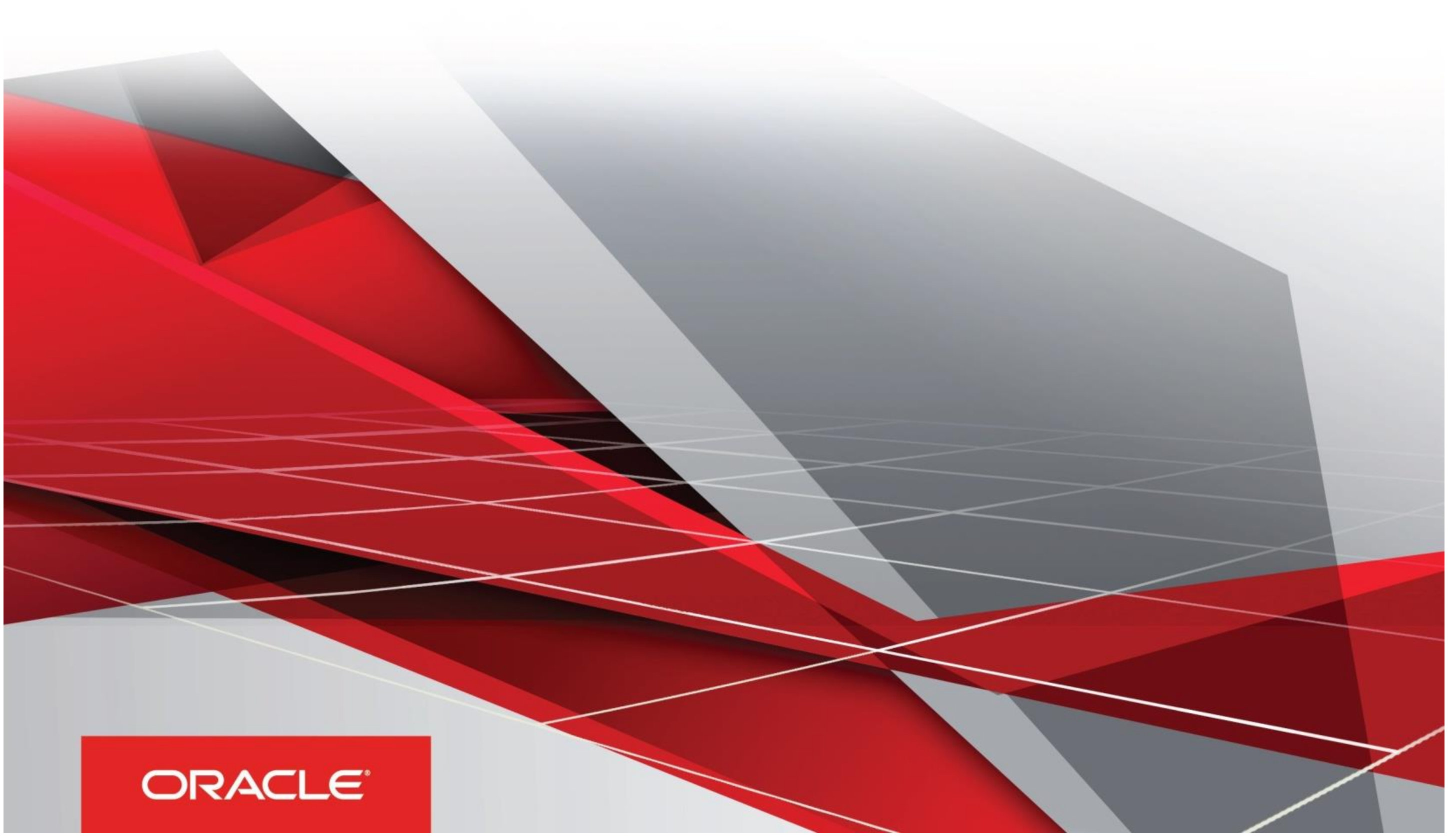


Table of Contents

Document Versioning

Date	Version	Change Reference
July 10, 2020	20200710	First draft published.
August 31, 2020	20200831	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](#).

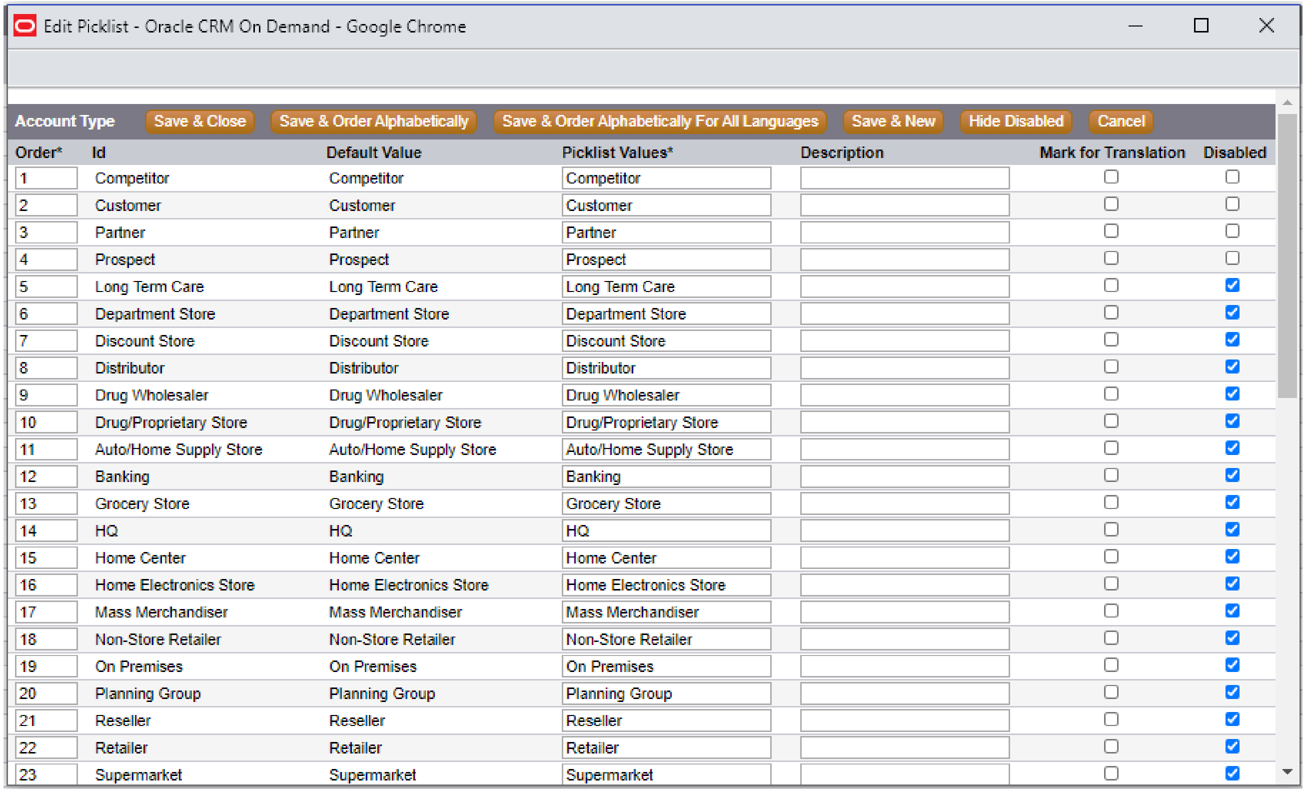
The following table summarizes the actions required by Oracle Customer Care, your company administrator, or the user, to set up or enable the features in this release. This list assumes that users have access to the referenced product area prior to the upgrade. For example, information about analytics 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
Administration				
Ability to Add Description for Each Picklist Value		✓		
Ability to Delete Private Lists for Other Users		✓		
Introduce Scrolling Text Alert Bar		✓		
Limit the Number of Emails for Integration Events				✓
Analytics				
Ability to Show the Account Hierarchy in Analytics				✓
Add Additional Custom Notes Fields to Custom Objects in Analytics				✓
Add Consistency between Events and Event History Subject Areas				✓
Expose Asset Dimension in Service Request Subject Areas				✓
Expose Household and Objective Fields in Opportunity Historical Subject Areas				✓
Expose Lead Event Custom Fields in Analytics				✓
Expose Opportunity Dimension in Assets Related Subject Areas				✓
Show Analysis Results when Navigating Back to the Analysis from the Detail Page				✓
Application Customization				
Ability to Customize and Audit Lead Event Record		✓		
Add Additional Custom Notes Fields to Custom Objects				✓
Enhance Additional Record Types to Support Custom Related Information Fields		✓		
Enhance Default Filter Criteria List and Edit Page		✓		
Expose Assets in Related Information Section of Opportunity		✓		
Expose Custom Objects as Children of Assets		✓		
Expose List of Service Requests Child Records for Assets		✓		
Support Activity Background Color Customization for Classic User Calendar Theme and Group Calendar		✓		

Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
Support Additional Field Types for Concatenated Fields - Visual Indicators, Checkboxes, Phones				✓
Connected Mobile Sales				
Check Client Version and Enforce Update in Connected Mobile Sales			✓	
Increase Radius for Around Me to Include 50, 100, and 500 Unit Options in Connected Mobile Sales			✓	
Usability				
Ability to Display Map for Addresses in Concatenated Field				✓
Add Province Field under Address for Portugal Country				✓
Allow Proximity Search on Radius Values of 50, 100, 500 Units				✓
Change City to Be Case Insensitive				✓
Enable the Record Preview Functionality on Pins Shown on Maps				✓
Enhance All Existing Tooltip Box to Use a Consistent Style				
Extend Description Fields to Support HTML Formatting				✓
Freeze List Column Header Extends to Administrative Pages			✓	
Record Pane for Child List Pages				✓
Restrict Update of Unavailable or Read Only Fields through Mass Update and Merge Operations				✓
Select a Custom Activity List to Display with Calendar			✓	
Update Country Name Swaziland in Oracle CRM On Demand				✓
Update Timezones & DST Mappings				✓
Web Services				
Add Invitee to Contact WS v2.0				✓
Enable the Ability to Alpha-order Picklists via Web Services				✓
Graphical User Interface Based Migration Tool Version Check				✓
Support W3C Format for Date and Boolean Fields in Integration Events		✓		

Ability to Add Description for Each Picklist Value

Description field is added to each picklist value, administrators can add or update the description for each picklist value in a picklist field.



Order*	Id	Default Value	Picklist Values*	Description	Mark for Translation	Disabled
1	Competitor	Competitor	Competitor		☐	☐
2	Customer	Customer	Customer		☐	☐
3	Partner	Partner	Partner		☐	☐
4	Prospect	Prospect	Prospect		☐	☐
5	Long Term Care	Long Term Care	Long Term Care		☐	☑
6	Department Store	Department Store	Department Store		☐	☑
7	Discount Store	Discount Store	Discount Store		☐	☑
8	Distributor	Distributor	Distributor		☐	☑
9	Drug Wholesaler	Drug Wholesaler	Drug Wholesaler		☐	☑
10	Drug/Proprietary Store	Drug/Proprietary Store	Drug/Proprietary Store		☐	☑
11	Auto/Home Supply Store	Auto/Home Supply Store	Auto/Home Supply Store		☐	☑
12	Banking	Banking	Banking		☐	☑
13	Grocery Store	Grocery Store	Grocery Store		☐	☑
14	HQ	HQ	HQ		☐	☑
15	Home Center	Home Center	Home Center		☐	☑
16	Home Electronics Store	Home Electronics Store	Home Electronics Store		☐	☑
17	Mass Merchandiser	Mass Merchandiser	Mass Merchandiser		☐	☑
18	Non-Store Retailer	Non-Store Retailer	Non-Store Retailer		☐	☑
19	On Premises	On Premises	On Premises		☐	☑
20	Planning Group	Planning Group	Planning Group		☐	☑
21	Reseller	Reseller	Reseller		☐	☑
22	Retailer	Retailer	Retailer		☐	☑
23	Supermarket	Supermarket	Supermarket		☐	☑

STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

» Translations of Description can be added if 'Mark for Translation' is checked.

Ability to Delete Private Lists for Other Users

Prior to Release 41, a user can only manage other user's private lists if they have the "Manage Private Lists" privilege. In Release 41, with the new "Delete Private Lists" privilege, the user can delete any of other users' private lists.

STEPS TO ENABLE

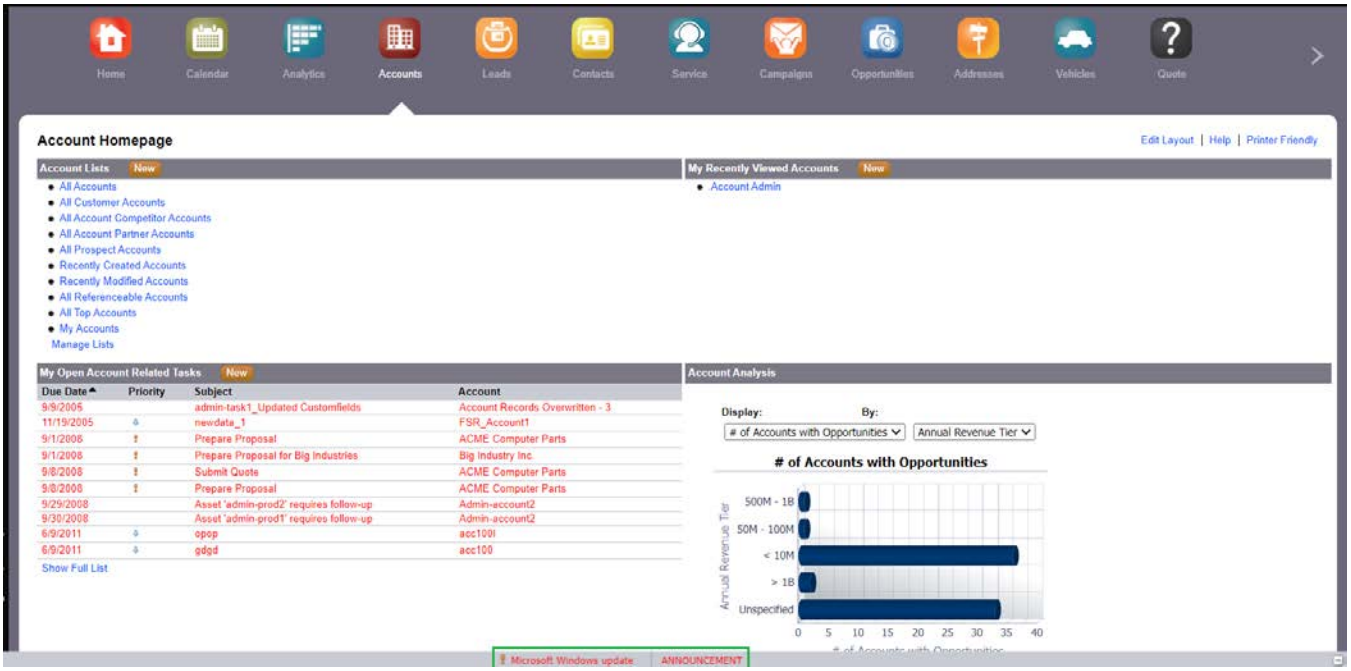
1. In the upper-right corner of any page, click Admin.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. In the Role Management section, click Role Management.
4. Click Edit link on any role.
5. In Step 4 of Role Management wizard, select the Delete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

TIPS AND CONSIDERATIONS

None

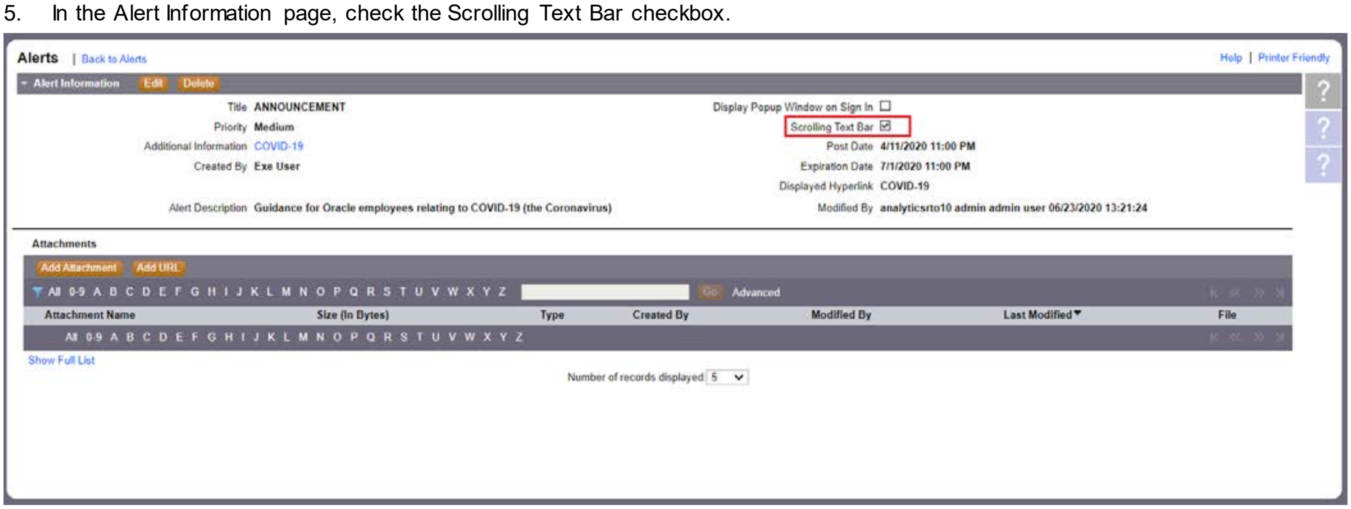
Introduce Scrolling Text Alert Bar

Prior Release 41, up to 5 most recent alerts are listed on Homepage. Alerts can be made to display in a popup w indow on signin w indow . In this release, Company alerts can be set to be displayed in the global scrolling text bar at the bottom of the screen.



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 Alert Management section, select Company Alerts.
4. In the Alerts page, select an alert from the list or click New button to create a new list.
5. In the Alert Information page, check the Scrolling Text Bar checkbox.



TIPS AND CONSIDERATIONS

» Users need to navigate aw ay from or reload the current page to receive new alerts.

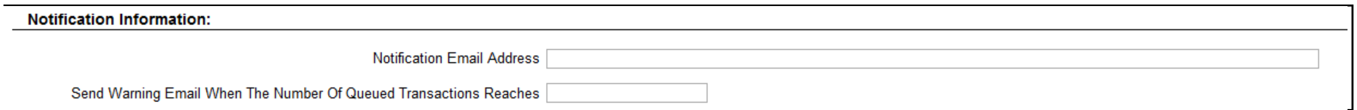
» Users can move the mouse over the alert to pause the text from scrolling.

» The description of the pointed alert is displayed in tooltip.

- The user can dismiss an alert from showing again by click it from the scrolling bar and checking 'I have read this, never show again' in the pop-up window.
- Alerts which have been acknowledged by a user will not be displayed again for that user in the scrolling text bar.
- User can click the '-'icon to minimize the scrolling text bar, and click the '+' icon to expand the scrolling text bar.

Limit the Number of Emails for Integration Events

Prior to Release 41, customers can set up the integration events queue to send a warning email when the queue has reached the threshold.



The notification settings in the Integration event queue management page for an integration event

Once the threshold is reached, every additional integration event added to the queue will generate another warning email.

In Release 41, a warning email is sent when the threshold is reached, however, any additional integration events to the queue will not generate additional warning emails.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

- After the warning email is sent when the queue reaches threshold, a final email will be sent, when the queue reaches its full capacity.
- If the queue falls below the threshold and reaches the threshold again, a warning email will be sent.

Analytics

Ability to Show the Account Hierarchy in Analytics

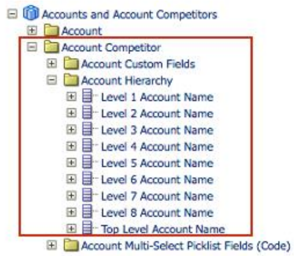
With Release 41, the account hierarchy is exposed in Analytics. The following subject areas are added with the account related hierarchy folders:

Historical Analytics Subject Areas

- Account and Competitor History
- Account and Partner History
- Account and Related Account History
- Account History
- Advanced Custom Objects History
- Lead History
- Opportunity and Competitor History
- Opportunity and Partner History
- Opportunity History
- Opportunity Product Revenue History
- Partner History

Real-time Reporting Subject Areas

- Account Revenues
- Accounts
- Account and Competitors
- Accounts and Partners
- Accounts and Related Accounts
- Advanced Custom Objects
- Business Plans
- CO01..03 and Accounts
- CO01..03 and Opportunities
- Forecasts
- Leads
- Opportunities
- Opportunities and Competitors
- Opportunities and Partners
- Opportunity Product Revenues
- Partners



In the illustration above, in the Accounts and Account Competitor subject area, the Account Hierarchy folder is added to the Account and Account Competitor folders.

STEPS TO ENABLE

There are no steps to enable this feature.

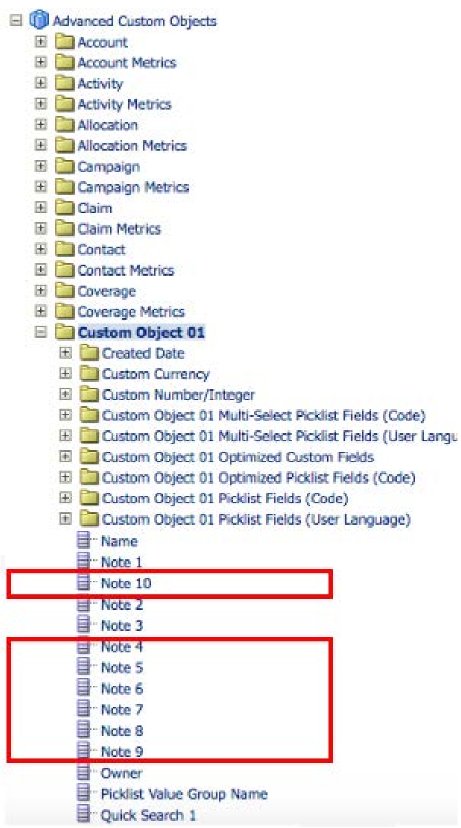
TIPS AND CONSIDERATIONS

None

Add Additional Custom Notes Fields to Custom Objects in Analytics

Seven custom fields of type Note are added to Custom Objects 01 to 40 in Release 41 and they are also exposed in Analytics in the following subject areas:

- Advanced Custom Objects History
- Advanced Custom Objects
- Custom Objects 01..03
- Custom Object 01..03 and Accounts
- Custom Object 01..03 and Contacts
- Custom Object 01..03 and Opportunities
- Custom Object 01..03 and Service Requests
- Business Plans



In the illustration above, the Advanced Custom Objects subject area has the new Note fields exposed under the Custom Object 01 folder. From Custom Object 04 to 40, the new Note fields are exposed under the Custom Object 04..40 Custom Attributes folder.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

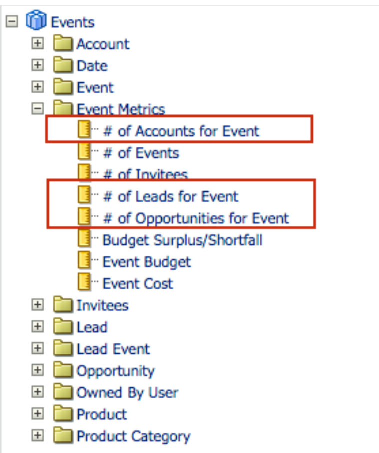
None

Add Consistency between Events and Event History Subject Areas

Starting with Release 41, some of the Event metrics in Events Real-time Reporting subject area have changed as following:

- The old metric # of Accounts is renamed to # of Accounts for Event and returns the number of accounts that are associated with events which have invitees
- The old metric # of Leads is renamed to # of Leads for Event and returns the number of leads that are associated with events which have invitees
- The old metric # of Opportunities is renamed to # of Opportunities for Event and returns the number of opportunities that are associated with events which have invitees

Before Release 41, these metrics returned the total number of accounts, leads and opportunities regardless of the association with events.



STEPS TO ENABLE

There are no steps to enable this feature.

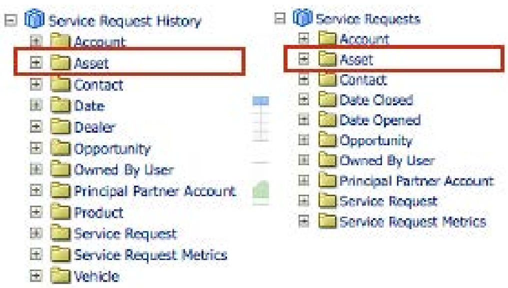
TIPS AND CONSIDERATIONS

None

Expose Asset Dimension in Service Request Subject Areas

With Release 41, the Service Requests are exposed as related information section for Asset and users can associate service requests to assets. In Analytics, the Asset dimension is exposed in the following subject areas, so users can now report on these associations:

- Service Request History
- Service Requests



In the illustration above, the Service Request History and Service Requests subject areas show the added Asset dimension.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Expose Household and Objective Fields in Opportunity Historical Subject Areas

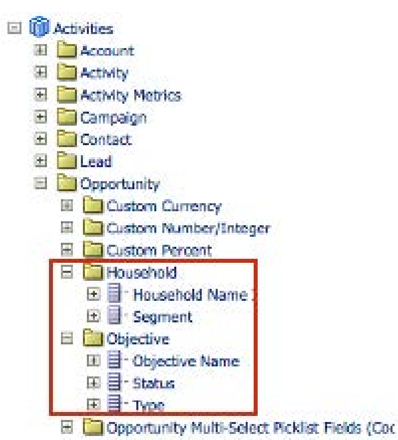
In Release 41, the Household and Objective folders and fields are exposed under the Opportunity dimension in the following subject areas:

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



In the illustration above, the Activities subject area has the new folders and fields exposed under the Opportunity folder.

STEPS TO ENABLE

There are no steps to enable this feature.

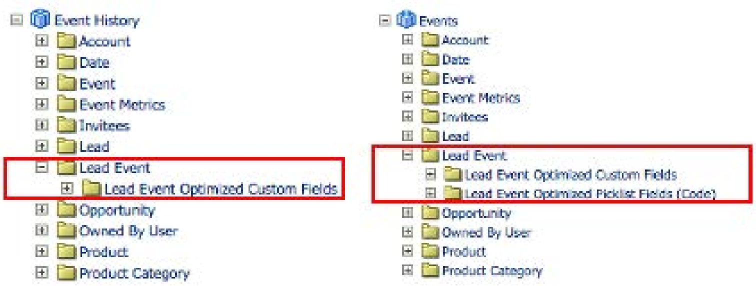
TIPS AND CONSIDERATIONS

None

Expose Lead Event Custom Fields in Analytics

The Lead Event Custom Fields are enabled in Release 41 and are also exposed in Analytics in the following subject areas:

- Event History
- Events



In the illustration above, the Event History and Events subject areas show the added Lead Event dimension.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

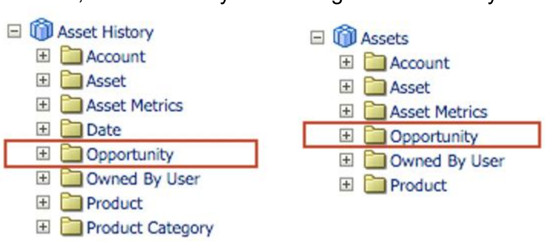
None

Expose Opportunity Dimension in Assets Related Subject Areas

With Release 41, the Assets are exposed as related information section for Opportunity and users can associate assets to opportunities. In Analytics, the Opportunity dimension is exposed in the following subject areas, so users can now report on these associations:

- Asset History
- Assets

In addition, Asset visibility has changed from visibility based on account to Owner visibility.



In the illustration above, the Asset History and Assets subject areas show the added Opportunity dimension.

STEPS TO ENABLE

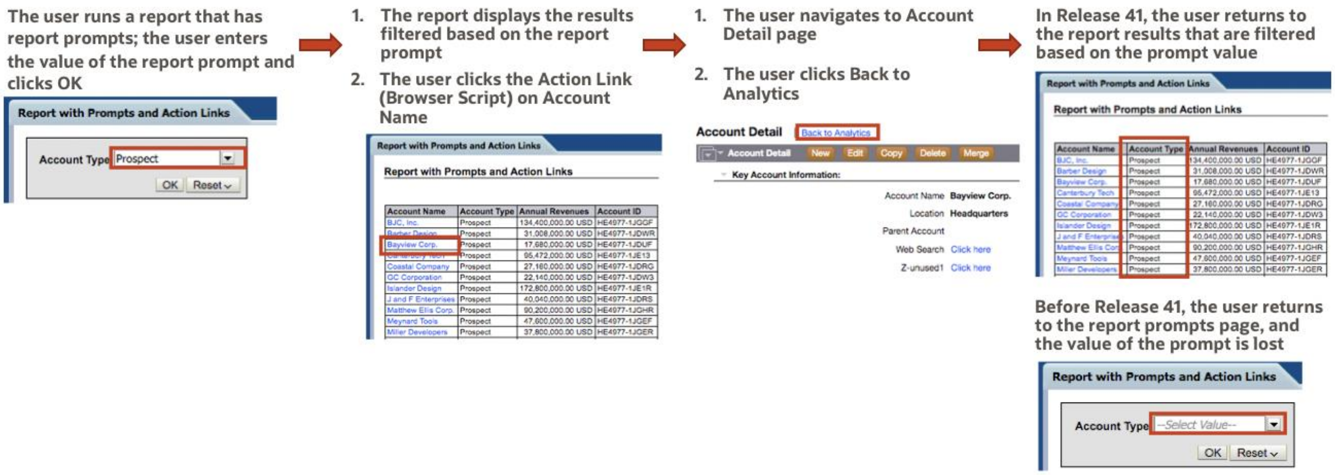
There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

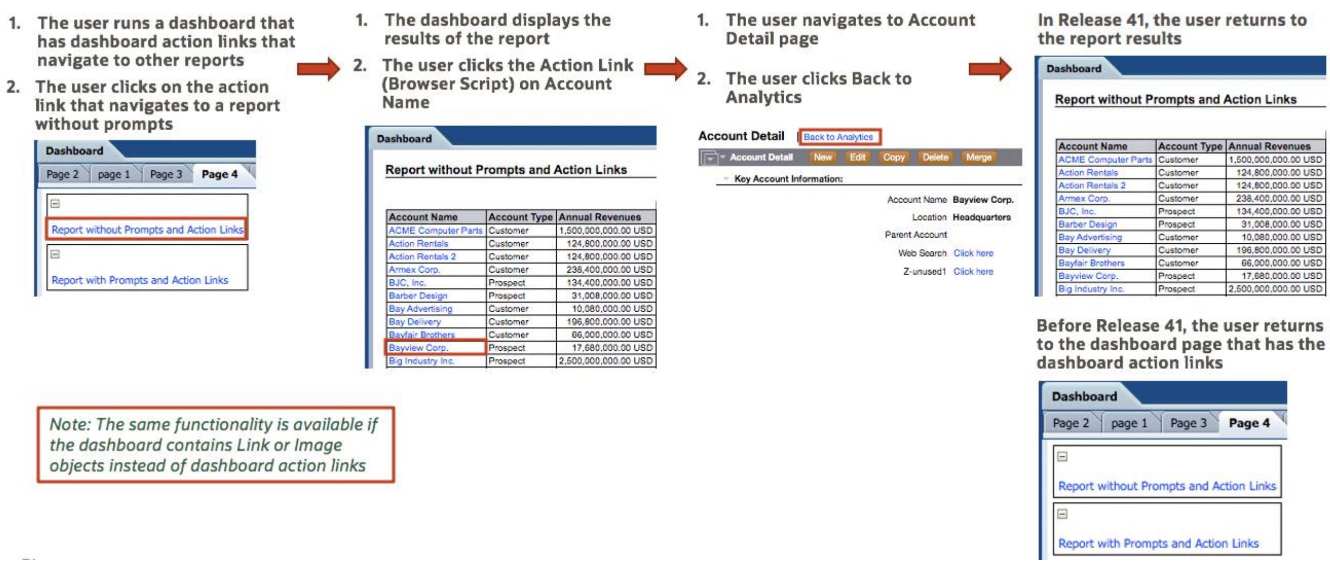
None

Show Analysis Results when Navigating Back to the Analysis from the Detail Page

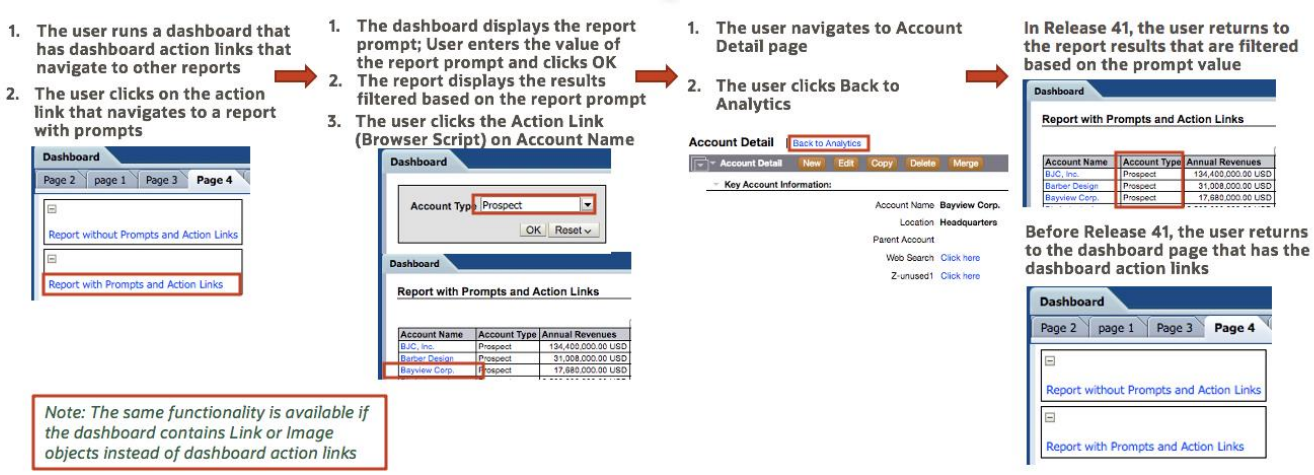
In Release 41, when a user filters the results of a report using report prompts, navigates via 'Browser Script' action links to a Detail page and then clicks on 'Back to Analytics' link, the user returns to the report page where the report results are still filtered based on the prompts values. The user can then click on another link to navigate to the Detail page of another record. Before Release 41, the user returned to the report prompts page, and the values of the prompts were lost. The user had to re-enter the report prompts to retrieve the filtered report results and navigate via action links to a Detail page of another record.



In Release 41, when a user displays the results of a report without prompts by clicking a dashboard action link, navigates via 'Browser Script' action links to a Detail page, and then clicks on 'Back to Analytics' link, the user returns to the report results page inside the dashboard. The user can then click on another link to navigate to the Detail page of another record. Before Release 41, the user returned to the dashboard page that had the dashboard action link and had to click again on the dashboard action link to navigate to the report results and navigate via action links to a Detail page of another record.



In Release 41, when a user displays the results of a report with prompts by clicking a dashboard action link, navigates via 'Browser Script' action links to a Detail page, and then clicks on 'Back to Analytics' link, the user returns to the report results page inside the dashboard and the report's results are still filtered based on the prompt values. The user can then click on another link to navigate to the Detail page of another record. Before Release 41, the user returned to the dashboard page that had the dashboard action link and had to click again on the dashboard action link to re-enter the report's prompts to retrieve the filtered report results and navigate via action links to a Detail page of another record.



STEPS TO ENABLE

There are no steps to enable this feature.

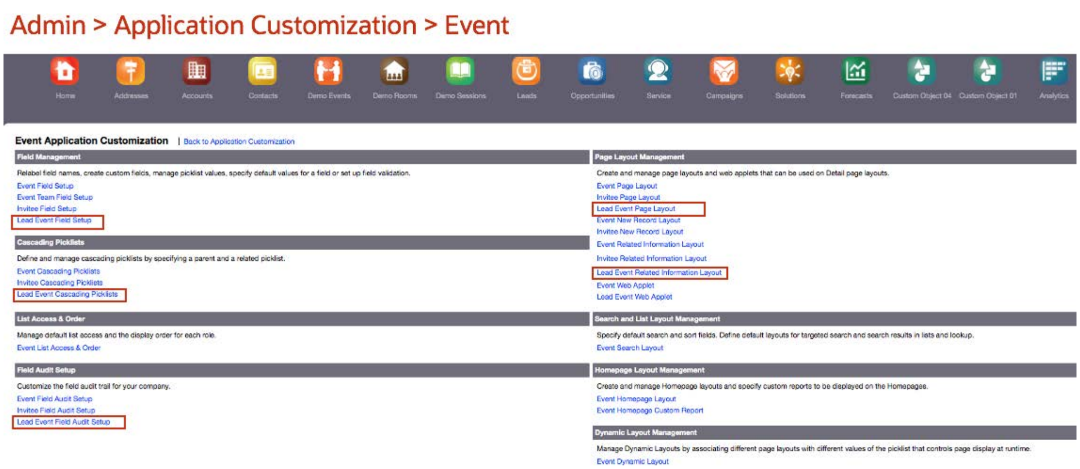
TIPS AND CONSIDERATIONS

None

Application Customization

Ability to Customize and Audit Lead Event Record

With Release 41, administrators can add custom fields and cascading picklist fields for the Lead Event record type. In addition, administrators can enable Audit Trail as Related Information section for the Lead Event record and review the changes made on the auditable fields.



Using the Admin > Application Customization > Event page, administrators can:

- Use Lead Event Field setup to create new custom fields for Lead Event record type
- Use Lead Event Cascading Picklists to create cascading picklists for Lead Event
- Use Lead Event Field Audit Setup to select the auditable custom fields
- Use Lead Event Page Layout to select which fields will be displayed on the Lead Event page when adding or updating Lead Event records

- Use Lead Event Related Information Layout to select the fields available in the Audit Trail related information section, if the Audit Trail related information section is enabled

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Add Additional Custom Notes Fields to Custom Objects

Prior to Release 41, administrators can only create 3 Custom Note fields for each custom object. In Release 41, administrators can now create up to 10 Custom Note fields for each custom object.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

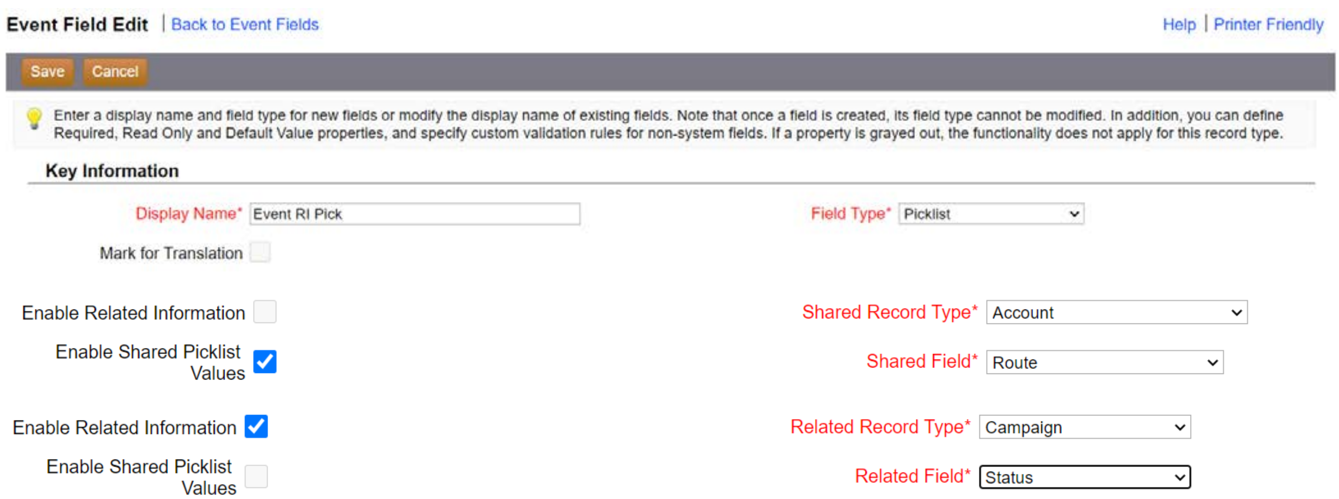
None

Enhance Additional Record Types to Support Custom Related Information Fields

A Custom Related Information field is a field on a given record type that can be used to display the values from a field in a related record type. For example, in Opportunity, a custom picklist field can be created and used to display the related Account Type value of an Account in the Opportunity record detail page.

Release 41 extends what have been done in Release 35 on the standard record types and adds the ability to create custom related information fields to the following record types: Event, Policy, Policy Holder, Insurance Property, Involved Party, Objective, Claim.

The following two illustrations show the setup of a custom related information field on the Event record:



STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

» Custom related information fields are read only fields

» If Enable Related Information is selected, then any pre-existing values in the field will be cleared for all records

» For custom picklist fields, user can check 'Enable Shared Picklist Values' check box and map the custom picklist field to a shared picklist field of available record type

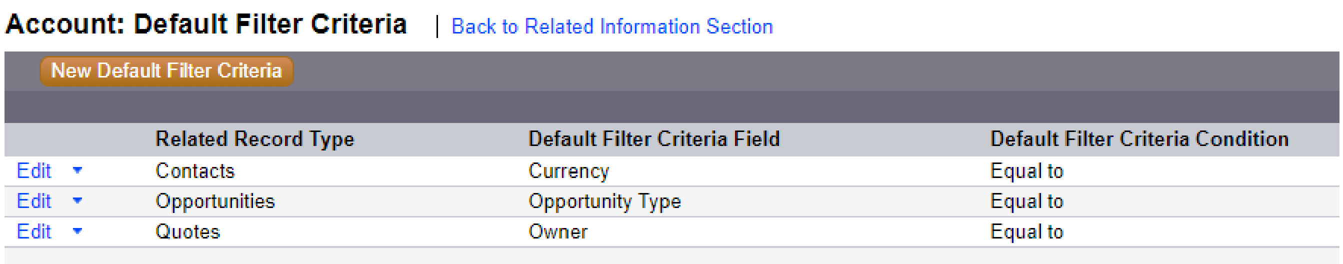
» If 'Enable Shared Picklist Values' is selected, then any pre-existing picklist values for this field will be disabled.

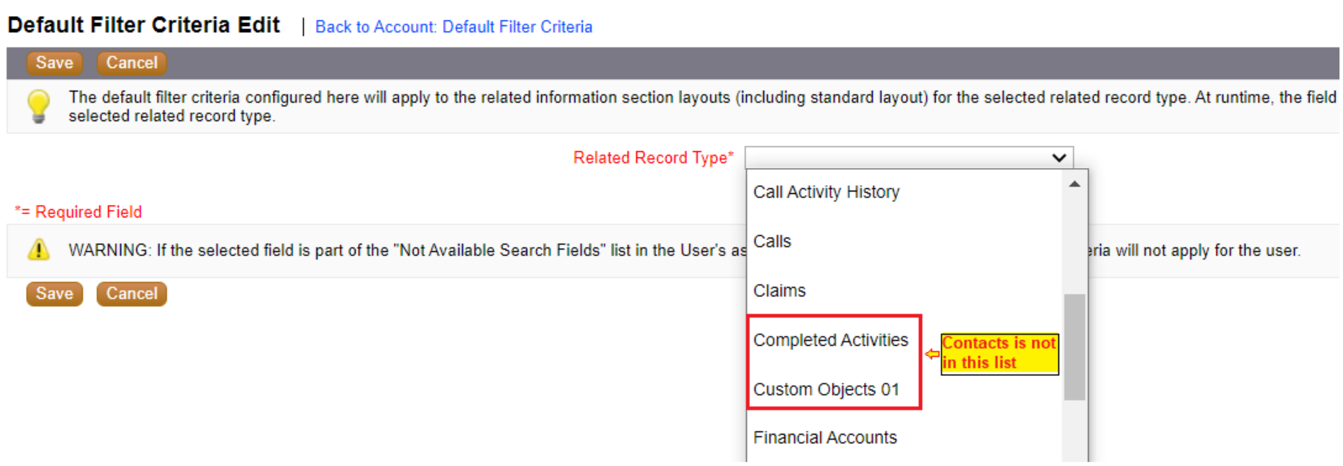
Enhance Default Filter Criteria List and Edit Page

Prior to Release 41, if a related record type already has default filter criteria created, users can still select it from the Related Record Type dropdown list on the Default Filter Criteria Edit but an error will return.

In Release 41, record types which have default filters defined already will not be displayed in the Related Record Type dropdown list for selection when users create new filters.

The following two illustrations show Contact is not available in the Related Record Type since Contact already has a default filter defined.





STEPS TO ENABLE

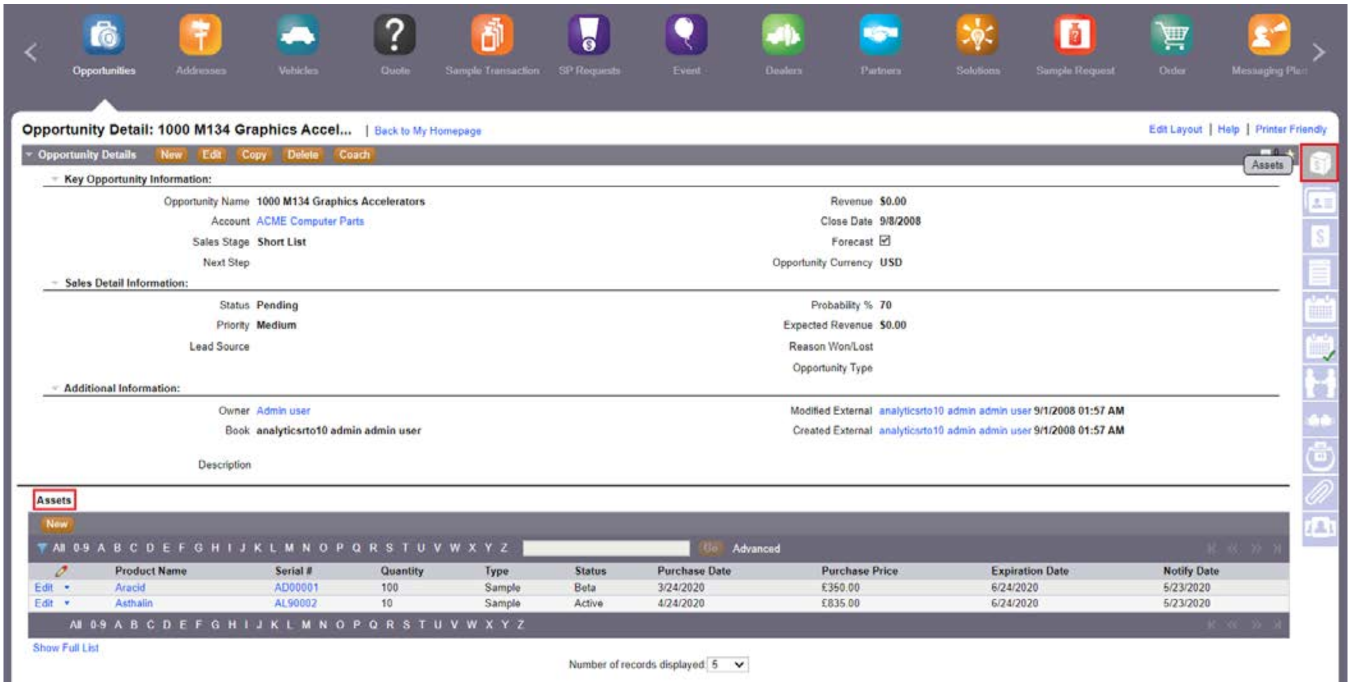
There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

None

Expose Assets in Related Information Section of Opportunity

Prior to Release 41, Assets are not available in the Related Information section on Opportunity detail page. Starting from Release 41, Assets can be associated with Opportunities, users can manage Assets directly from Opportunity Detail page.



STEPS TO ENABLE

There are no steps required to enable the feature.

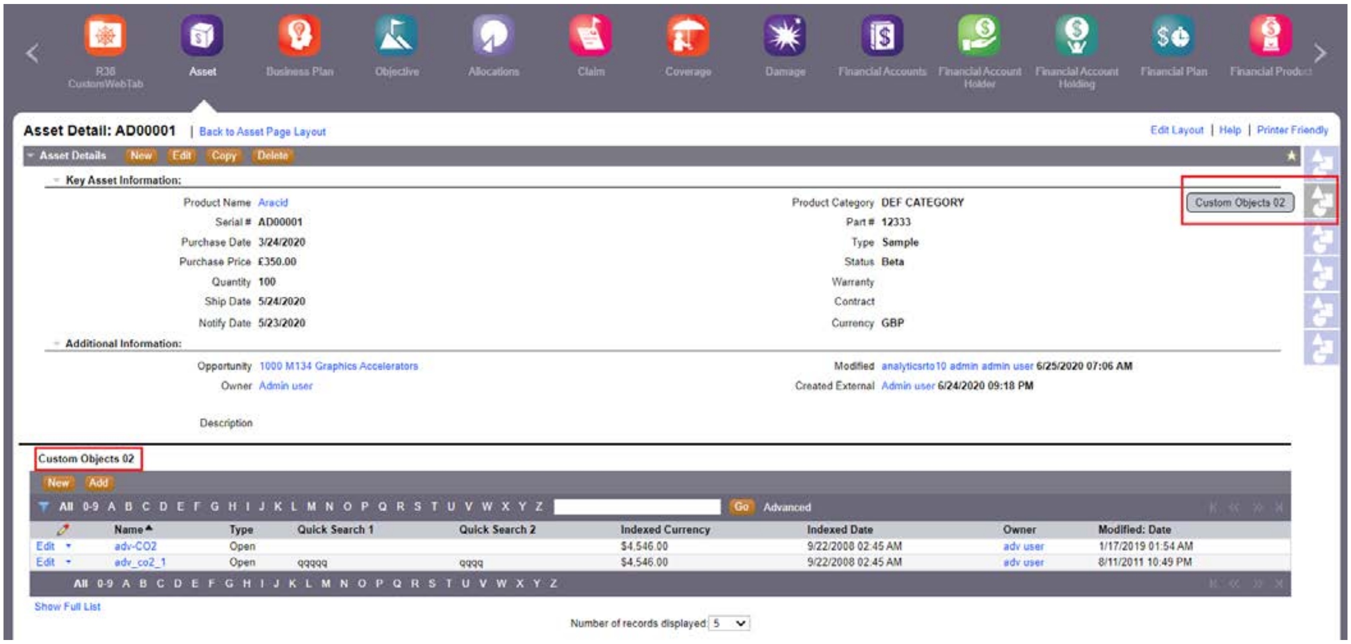
TIPS AND CONSIDERATIONS

To allow a user to add and update Assets from the Opportunity Detail page, administrators need to ensure the access level for Opportunity > Assets is set to View in the Access Profile and Assets is selected to be displayed in the Related Information list in Opportunity Page Layout for the user's role.

Expose Custom Objects as Children of Assets

Prior to Release 41, Custom Objects are not available in the Related Information section on Asset Detail page. Starting w ith Release 41, Custom Object 01-40 can be associated w ith Assets and users can manage Custom Objects directly from Asset Detail page.

The follow ing tw o illustrations show Custom Object 02 and other Custom Objects are displayed as children of Asset on Asset detail page



STEPS TO ENABLE

There are no steps required to enable the feature.

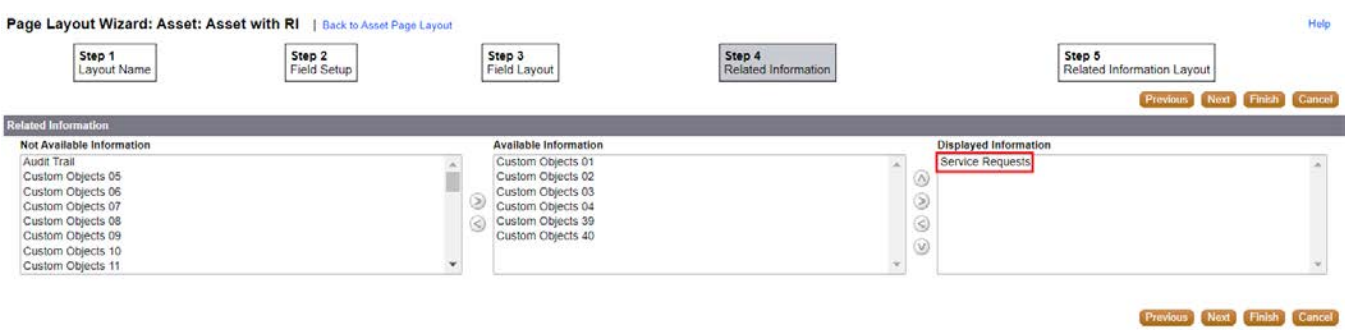
TIPS AND CONSIDERATIONS

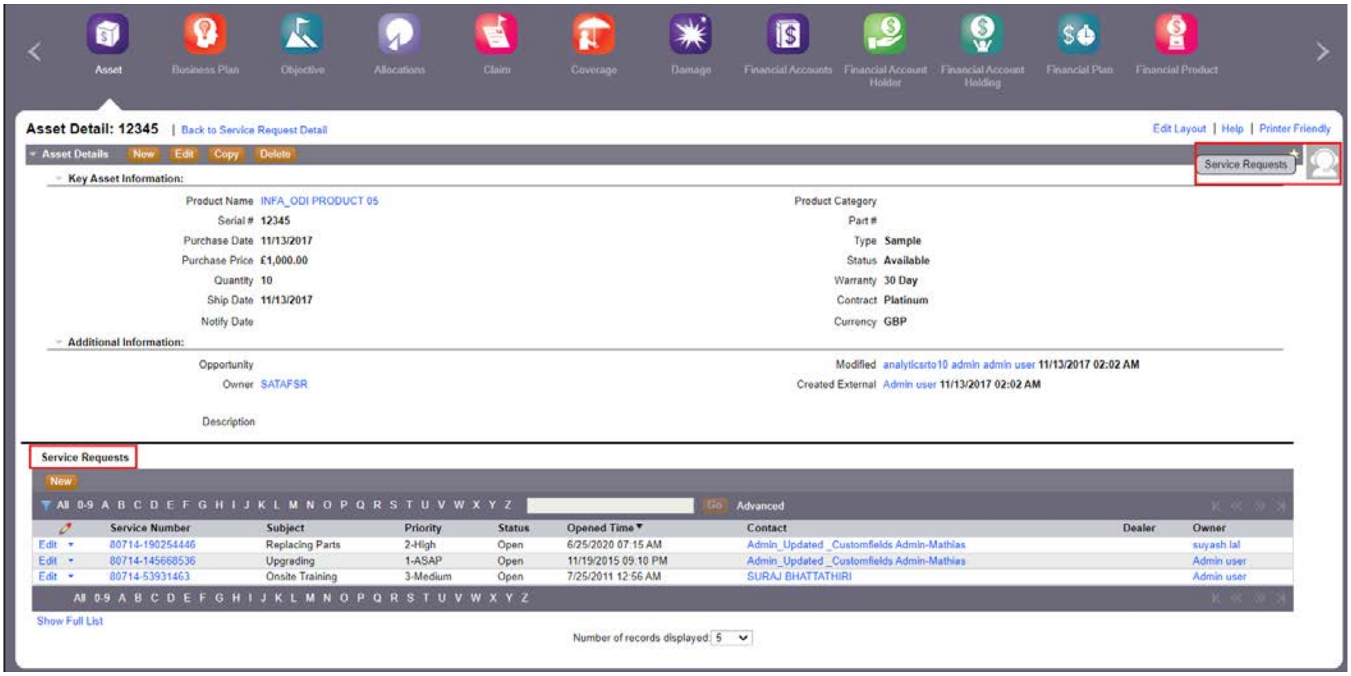
To allow a user to add and update Custom Object # from the Asset Detail page, administrators need to ensure the access level for Asset > Custom Object # is granted in the Access Profile and the Custom Object is selected to be displayed in the Related Information list in Asset Page Layout for the user's role.

Expose List of Service Requests Child Records for Assets

Prior to Release 41, Service Requests are not available in the Related Information section on Asset detail page. Starting from Release 41, Service Requests can be associated with Assets, users can manage Service Requests directly from Asset detail page.

The following two illustrations show Service Request List is displayed as related information of Asset on Asset detail page





STEPS TO ENABLE

There are no steps required to enable the feature.

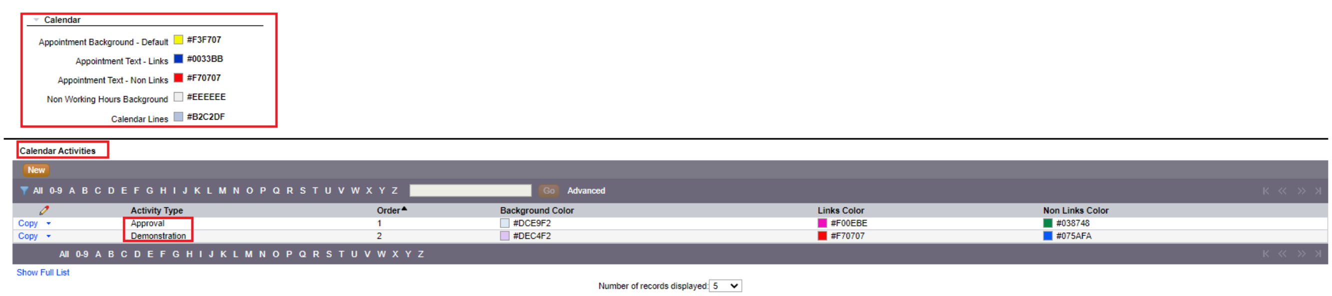
TIPS AND CONSIDERATIONS

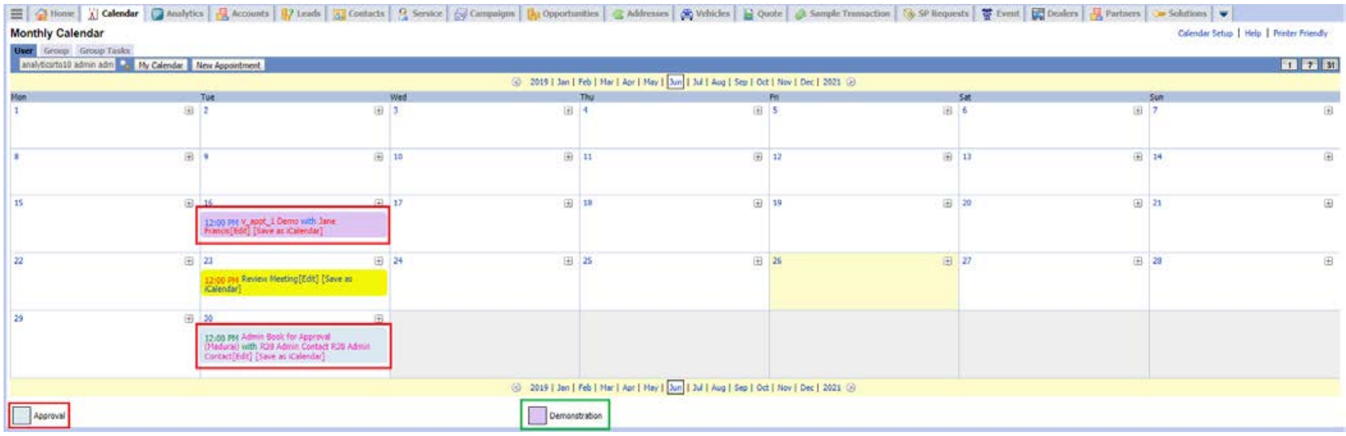
To allow a user to add and update Service Requests from the Asset Detail page, administrators need to ensure the access level for Asset > Service Requests is granted in the Access Profile and the Service Requests is selected to be displayed in the Related Information list in Asset Page Payout for the user's role.

Support Activity Background Color Customization for Classic User Calendar Theme and Group Calendar

Prior Release 41, Oracle CRM On Demand supports only Activity Background and Text theme colors customization for Calendar in Modern Themes. The functionality has been extended to User and Group Calendar in Classic Theme with this feature.

The following two illustrations show a customized Classic Theme page, and the effects on user's calendar view.





STEPS TO ENABLE

There are no steps required to enable the feature.

TIPS AND CONSIDERATIONS

Administrators create customized themes based on the out-of-the-box classic theme for company users.

Support Additional Field Types for Concatenated Fields - Visual Indicators, Checkboxes, Phones

In Release 41, star rating, stoplight, checkbox, as well phone fields can be added to concatenated fields.

A concatenated field with the phone and visual indicators fields

STEPS TO ENABLE

There are no steps to enable this feature.

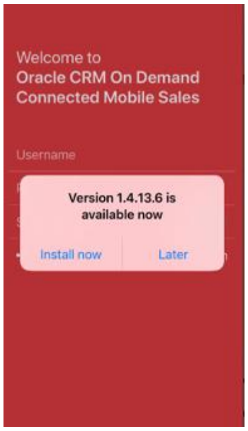
TIPS AND CONSIDERATIONS

None

Connected Mobile Sales

Check Client Version and Enforce Update in Connected Mobile Sales

Starting with Release 41, Connected Mobile Sales users are notified if a newer version for the Connected Mobile Sales client is available. Users can choose to install it immediately, or later.



STEPS TO ENABLE

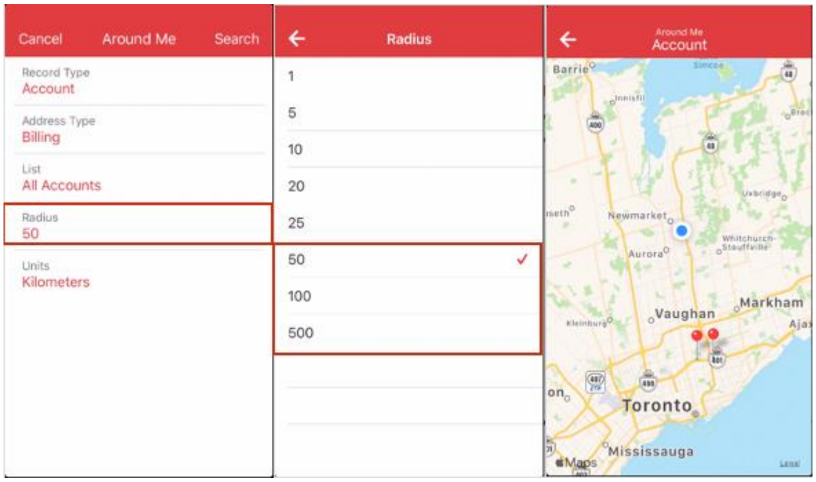
There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

The users need to install and run the latest Connected Mobile Sales client.

Increase Radius for Around Me to Include 50, 100, and 500 Unit Options in Connected Mobile Sales

Starting with Release 41, Connected Mobile Sales users can do proximity searches with a radius of 50, 100 and 500 Kilometers or Miles.



STEPS TO ENABLE

There are no steps to enable this feature.

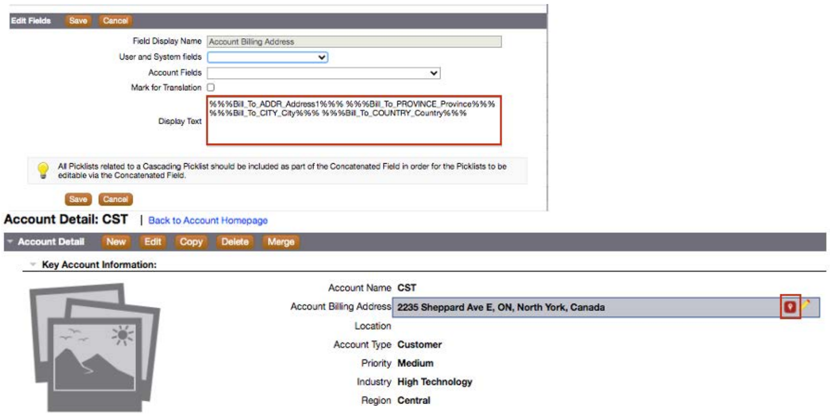
TIPS AND CONSIDERATIONS

The users need to install and run the latest Connected Mobile Sales client.

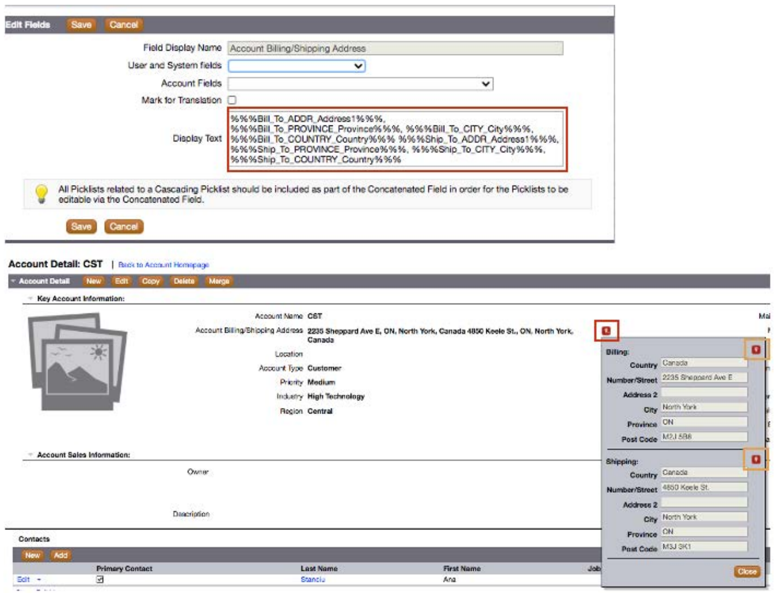
Usability

Ability to Display Map for Addresses in Concatenated Field

When administrators create a concatenated field that contains address fields and users have the Maps Integration privilege, the Map icon is now displayed beside the concatenated field and users can navigate to the Maps tab to see the address(es) location on the map. This functionality is available if the concatenated field is added to the Detail pages, List pages and Related Information sections. Prior to Release 41, the Map icon was not displayed, and users could not navigate to the Maps tab to see the address(es) location on the map.



In the illustration above, the Administrator created a concatenated field using address fields from the Account Billing Address and exposed the concatenated field on the Account Detail page. The Map icon is shown beside the concatenated field giving the user the ability to click it and navigate to the Maps tab to show the address on the map.



In the illustration above, the administrator created a concatenated field using address fields from both Account Billing and Shipping Addresses and exposed the concatenated field on the Account Detail page. The Map icon shown beside the concatenated field gives the user the ability to click it and display a popup showing now both the Billing and Shipping addresses which are part of the concatenated field. The user can now click on the map icon displayed beside the Billing Address or the Shipping Address and navigate to the Maps tab to show the address location.

STEPS TO ENABLE

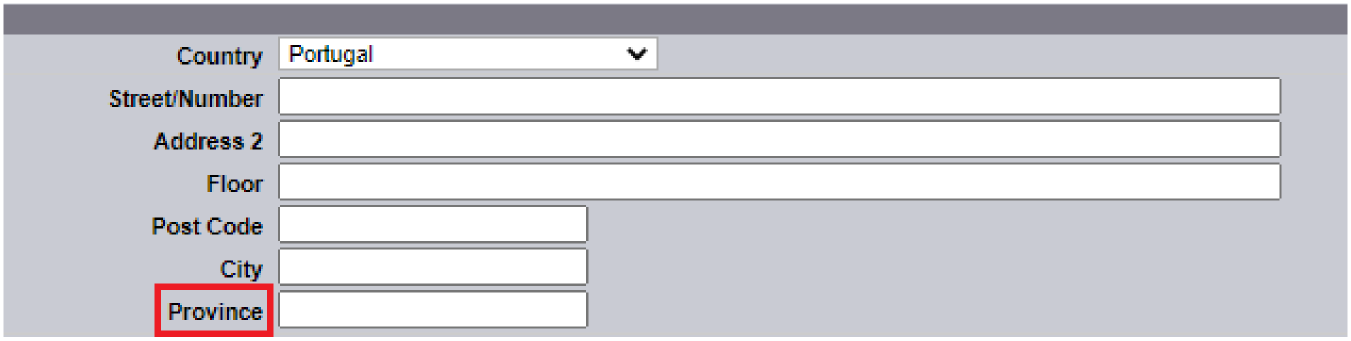
There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Add Province Field under Address for Portugal Country

Prior Release 41, Province field is not available for country Portugal. In Release 41, Province appears in address template when user selects country Portugal.



STEPS TO ENABLE

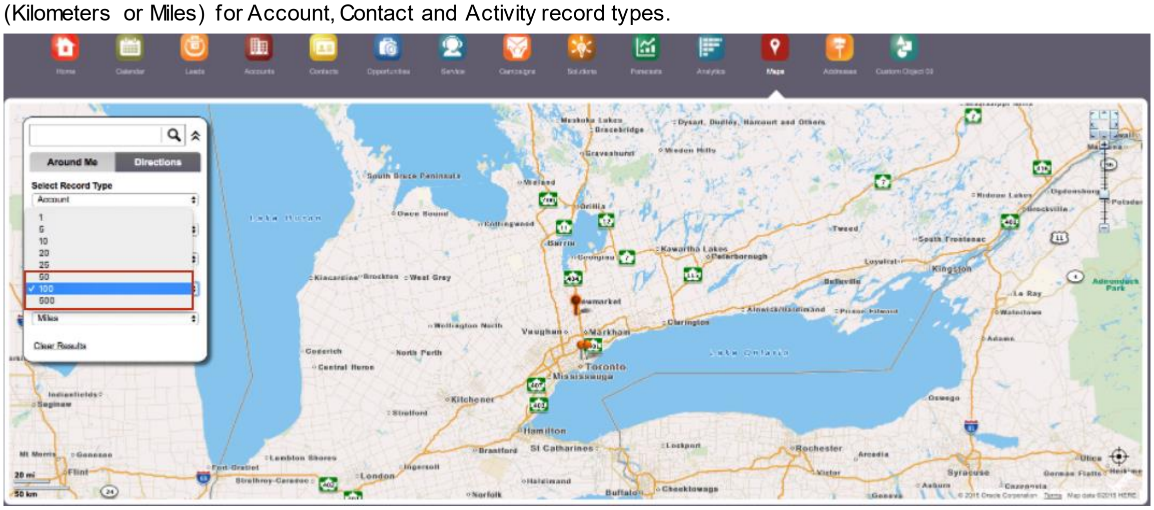
There are no steps required to enable the feature

TIPS AND CONSIDERATIONS

None

Allow Proximity Search on Radius Values of 50, 100, 500 Units

With this feature, users can perform proximity searches with a radius of 50, 100 and 500 Units (Kilometers or Miles) for Account, Contact and Activity record types. Prior to Release 41, users could not perform proximity searches with a radius larger than 25 Units (Kilometers or Miles) for Account, Contact and Activity record types.



In the illustration above, the user is performing a proximity search for the Account record type. In the Radius drop-down, the new options of 50, 100 and 500 units are available.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Change City to Be Case Insensitive

Prior to Release 41, the search for City is case sensitive. Starting in Release 41, search for the City field is case insensitive by default for searching in the action bar, Advanced Search, Search Layout Wizard, Address Lookup, Refined List search criteria section for the following record type city fields:

- Account - Billing City, Shipping City
- Contact - Contact City, Account Address City
- Address - City
- Claim – City
- Lead - Billing

STEPS TO ENABLE

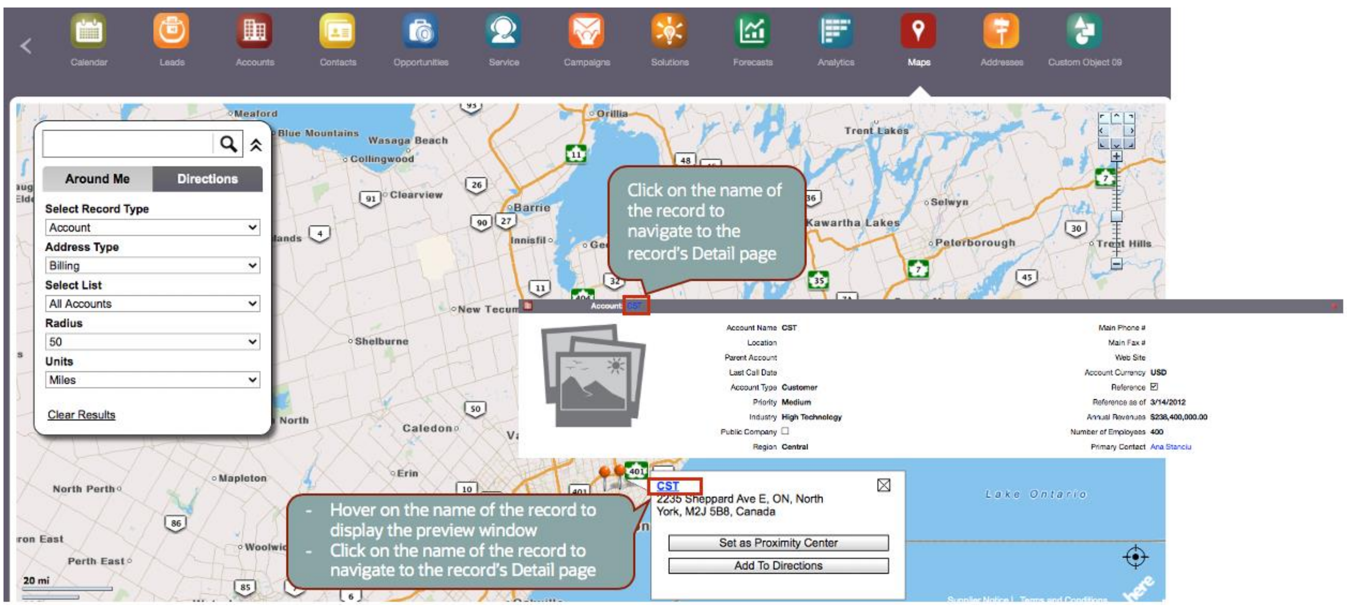
There are no steps required to enable the feature

TIPS AND CONSIDERATIONS

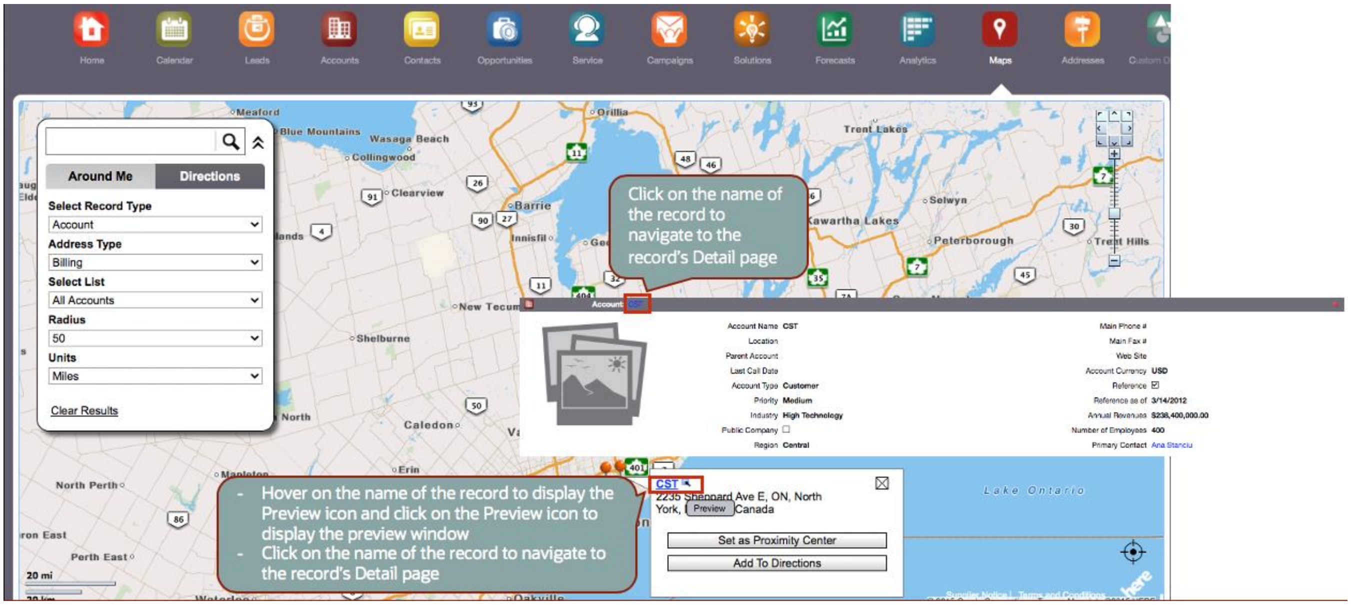
None

Enable the Record Preview Functionality on Pins Shown on Maps

Before Release 41, users could preview records from record links in My Homepage, Record Homepages, Record List pages, Record Details pages (including lists of related records) and Action bar if the record preview functionality was enabled. With Release 41, if the record preview functionality is enabled, users can also preview records from the pins that are placed on a map to indicate the locations of addresses that are returned by a proximity search.



In the illustration above, the user performed a proximity search using the Account record type. The user clicks the desired pin that is displayed following the proximity search. A little pop-up with the name and address of the record that is associated with the pin, is displayed. The Record Preview Mode is set to Hover on Link, in which case the user can hover the mouse over the name of the record to display the first section of the record's Detail page in the record preview window. In addition, the user can click on the link for the name of the record available in the record preview window, to open the record's Detail page. The user can also open the Detail page of the record from the link for the name of the record in the initial pop-up as well as from the preview window.



In the illustration above, the user performed a proximity search using the Account record type. The user clicks the desired pin that is displayed following the proximity search. A little pop-up, with the name and address of the record that is associated with the pin, is displayed. The Record Preview Mode is set to Click on Preview Icon, in which case the user can hover the mouse over the name of the record to display the Preview icon. On clicking the Preview icon, the user can display the first section of the Detail page of the record in the record preview window. In addition, the user can click on the link for the name of the record available in the record preview window, to open the record's Detail page. The user can also open the record's Detail page from the link for the name of the record in the initial pop-up as well as from the preview window.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

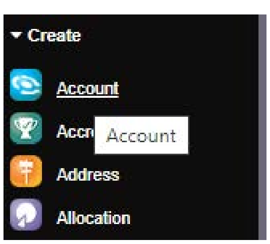
Enhance All Existing Tooltip Box to Use a Consistent Style

Prior to Release 41, Oracle CRM On Demand has some out-of-the-box tooltips in old style. In Release 41, all existing out-of-the-box tooltips in Oracle CRM On Demand have been enhanced to be consistent in style and behavior to the new style.

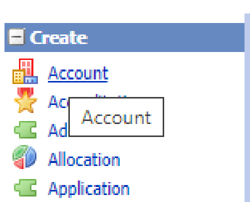
The following two illustrations compare some tooltips between Release 40 and Release 41:

Mouse over Account:

Modern Theme

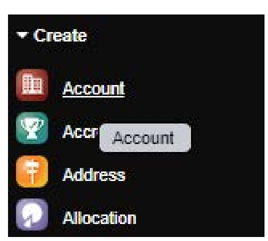


Classic Theme

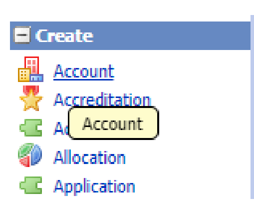


Release 40

Modern Theme

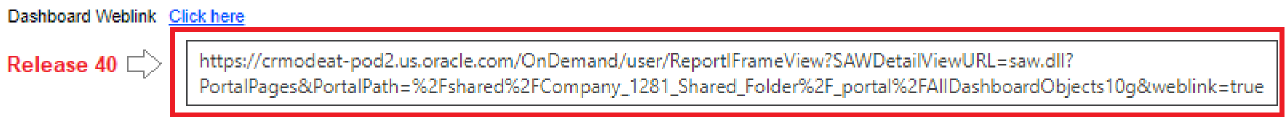


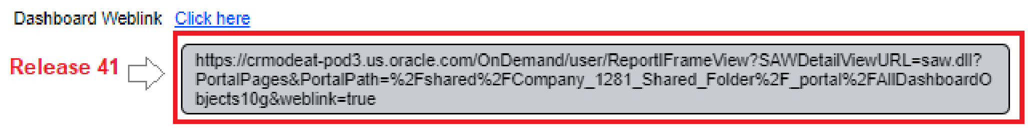
Classic Theme



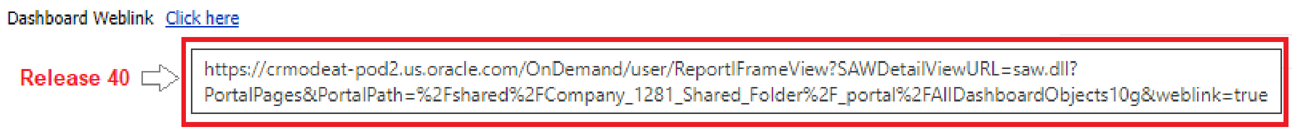
Release 41

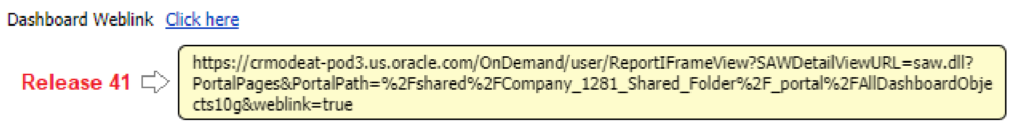
Mouse over link Modern Theme:





Mouse over link Classic Theme:





STEPS TO ENABLE

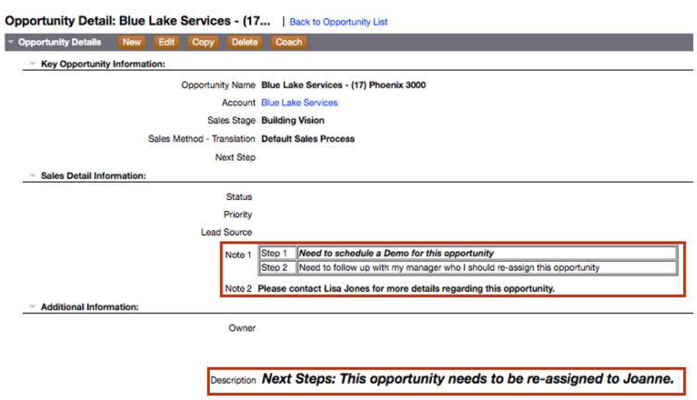
There are no steps required to enable the feature

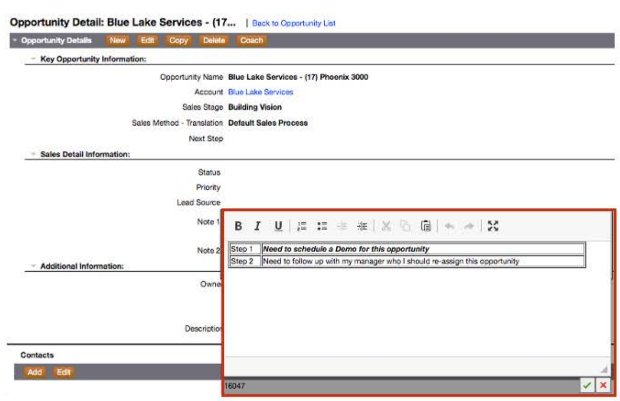
TIPS AND CONSIDERATIONS

None

Extend Description Fields to Support HTML Formatting

Prior to Release 41, when the 'Enable HTML Formatting' check box on the company profile is selected, an HTML editor is available for the Description field when the user creates or edits a note in the Notes related information section on a record Detail page. Also, the HTML formatting is applied when you view the note through the Related Information section. Starting in Release 41, when the 'Enable HTML Formatting' check box on the company profile is selected, the HTML editor and HTML formatting are now available in fields of the Note field type, including custom fields of Note type and in the Description field, if the Description field is a Note field.





In the example above, the 'Enable HTML Formatting' check box on the company profile is selected. In the left-hand side illustration, the fields of type Note, and the Description field were added to the Opportunity page layout. All three fields contain HTML and the HTML formatting is applied when the user is viewing the Opportunity Detail page. In the right-hand side illustration, the Note 1 field is edited using Inline Edit and the HTML Editor is available so the user can edit the Note using HTML formatting.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Freeze List Column Header Extends to Administrative Pages

In Release 41, the “Freeze List Column Header” setting now also applies to the lists in administrative pages, such as in Role Management Wizard.

STEPS TO ENABLE

There are no steps to enable this feature.

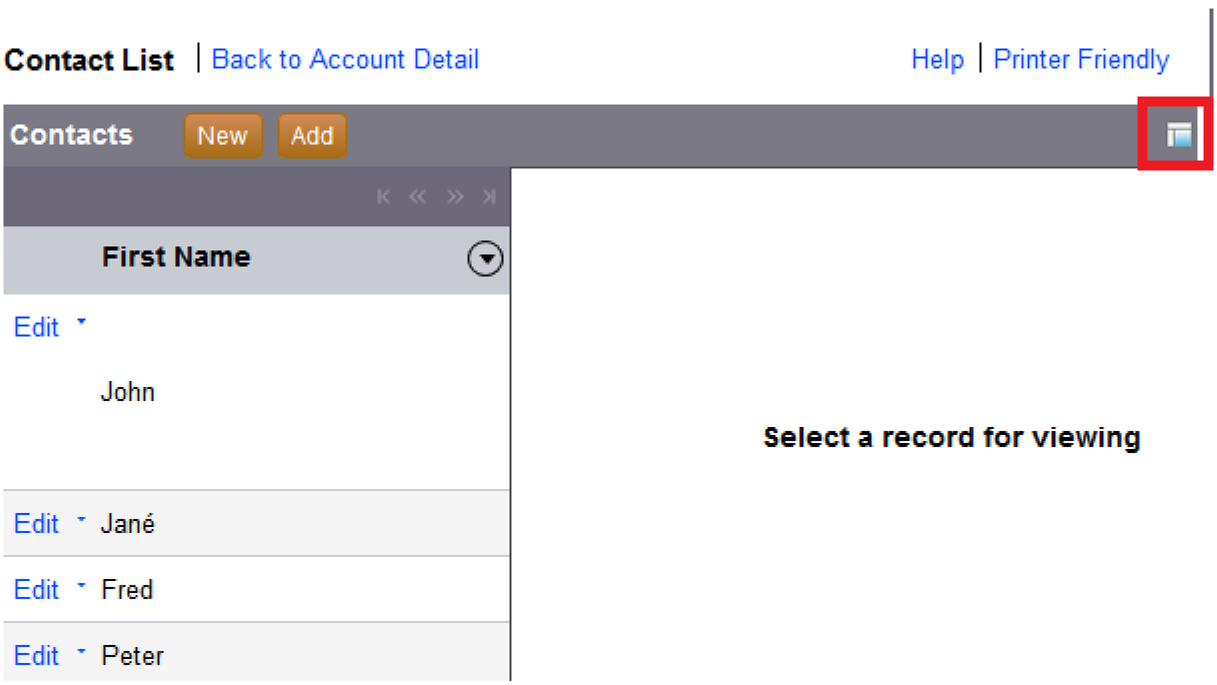
TIPS AND CONSIDERATIONS

- The “Freeze List Column Header” can be set at the company profile or personal profile:
  - If the Freeze List Column Header field in your personal profile is blank, then the setting for the company is used
- When set to On, the headers of the lists will remain visible as the user scrolls down the list
- When set to Off, the headers of the lists will not remain visible as the user scrolls down the list

Record Pane for Child List Pages

In Release 41, the record pane is supported in any child record type full list pages.

For example, the record pane icon is now available when viewing the full contact list for an account.



Record pane for the Account’s Contacts full list page

STEPS TO ENABLE

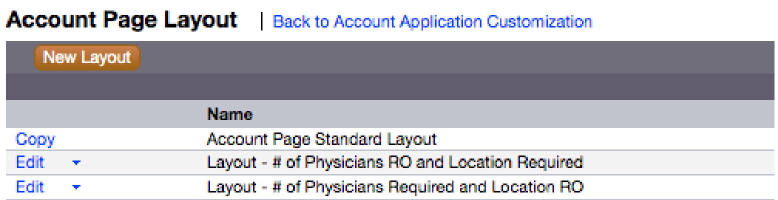
There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Restrict Update of Unavailable or Read Only Fields through Mass Update and Merge Operations

Before Release 41, if certain fields were not exposed on static page layouts assigned to users' role, these fields could not be updated by these users in Mass Update and Merge operations since the fields were not exposed on users' layout. With Release 41, this feature extends the same restriction to fields that are not exposed through dynamic layouts. In addition, records which are locked based on the rules and states defined in 'Process Administration' and records which are not available for any updates (read-only) through access profiles cannot be updated either in Mass Update or Merge operations.



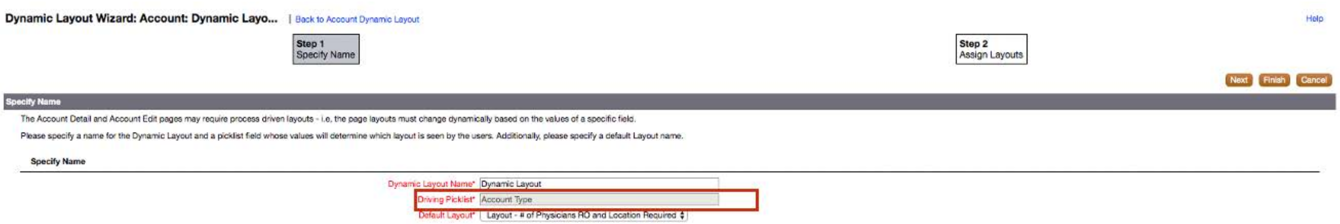
Layout - # of Physicians RO and Location Required

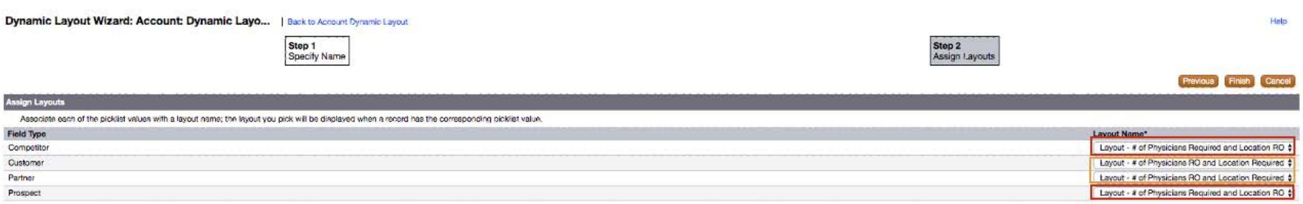
Display Name	Required	Read-only
# of Physicians		✓
Location	✓	

Layout - # of Physicians Required and Location RO

Display Name	Required	Read-only
# of Physicians	✓	
Location		✓

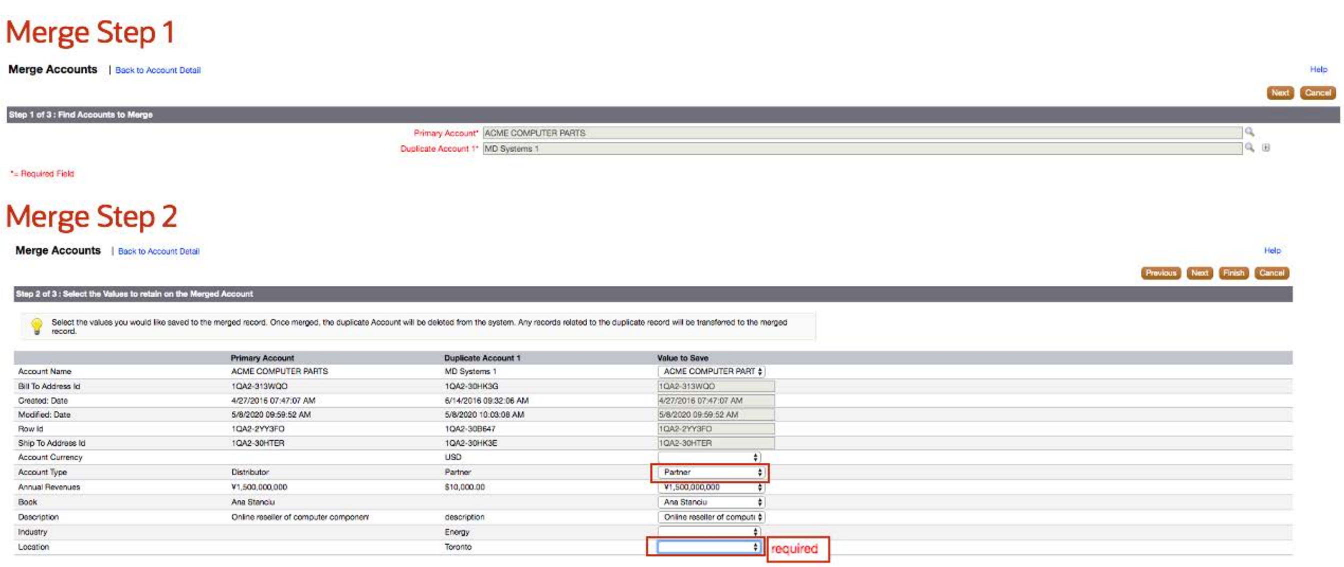
In the illustration above, the administrator created two static page layouts: 'Layout - # of Physicians RO and Location Required' – where # of Physicians field is read-only and Location is Required and 'Layout - # of Physicians Required and Location RO' – where # of Physicians field is required and Location is read-only.



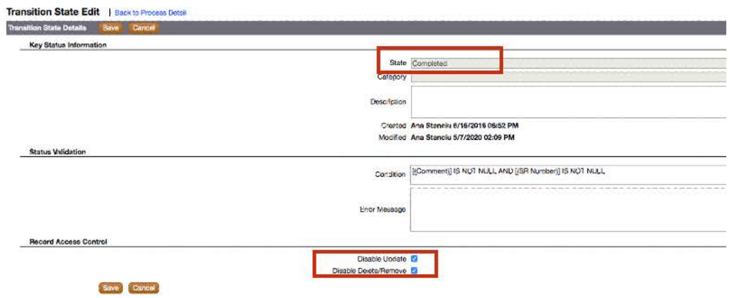


The administrator created a dynamic layout where the driving picklist is the Account Type. In Step 2, for different account type values, the administrator assigned one of the two static page layouts defined earlier. For example, for account type Competitor and Prospect, the administrator assigned the 'Layout - # of Physicians Required and Location RO'. While for account type Customer and Partner, the administrator assigned the 'Layout - # of Physicians RO and Location Required'.

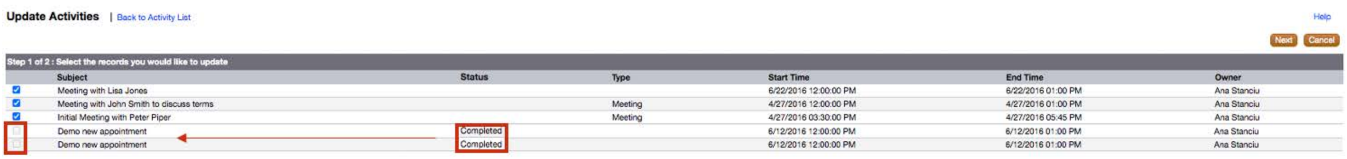
In the illustration above, the user performs a Mass Update on a list of accounts. In Step 1, the user selects the records that are part of the Mass Update operation. In Step 2, the user selects the account type to be Partner and sets a value to update the # of Physicians field. How ever, the layout associated w ith the Partner account type is ‘Layout - # of Physicians RO and Location Required’, therefore the # of Physicians field cannot be updated and the user receives error messages w hen clicking Finish in Step 2. Similar errors are encountered if the user w ants to update Location to a null value, since the layout for Partner account type enforces the Location to be required as w ell.



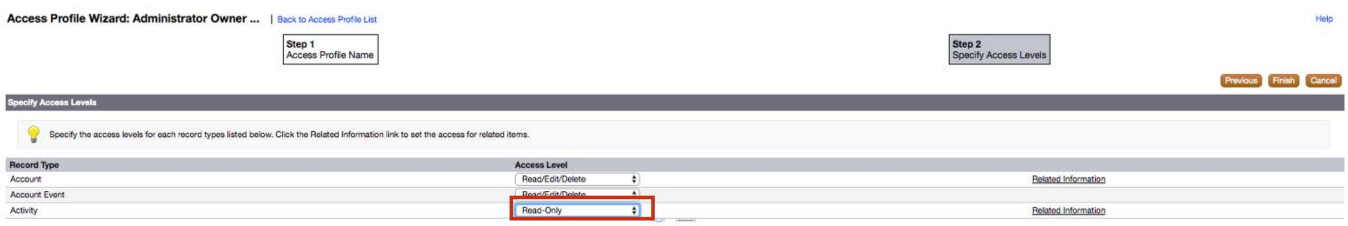
In the illustration above, the user performs a Merge operation betw een tw o accounts. In Step 1, the user selects the primary and the duplicate account records to be merged. In Step 2, the user specifies the values to be saved on the primary record, for example ‘Account Name’, w hich should be ACME Computer Parts after the merge, the value for the account type should be Partner and in addition, the Location field should be saved w ithout a value. How ever, the layout associated w ith the Partner account type is ‘Layout - # of Physicians RO and Location Required’, therefore w hen clicking Finish, the user notices that Location field needs to be provided and cannot complete the Merge operation. If, for example, the user provides a new value for the # of Physicians field, the Merge operation w ill be completed and the user does not receive an error, how ever the # of Physicians field w ill not be updated w ith the new value since it is read-only as per layout definition.



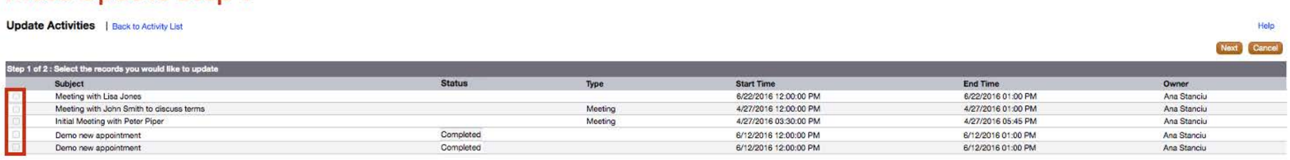
Mass Update Step 1



In addition, w ith this feature, the Step 1 of Mass Update page is enhanced so certain records cannot be selected using the checkboxes beside the records w hich are locked based on the rules and states defined in 'Process Administration' module, in the 'Transition State Edit' page show n in the illustration above. For example, some of the activities have the status Completed, and in this state, the Process Administration rule has disabled the update operation, and the checkboxes beside the activities' records cannot be selected.



Mass Update Step 1



Also, w ith this feature, some records cannot be selected in Step 1 of the Mass Update, if the access profile is set to Read-Only for the records. In this example, the access level for the Activity record is set to Read-only using the access profile w izard. In Step 1 of the Mass Update, none of the activity records can be selected for Mass Update.

STEPS TO ENABLE

There are no steps to enable this feature.

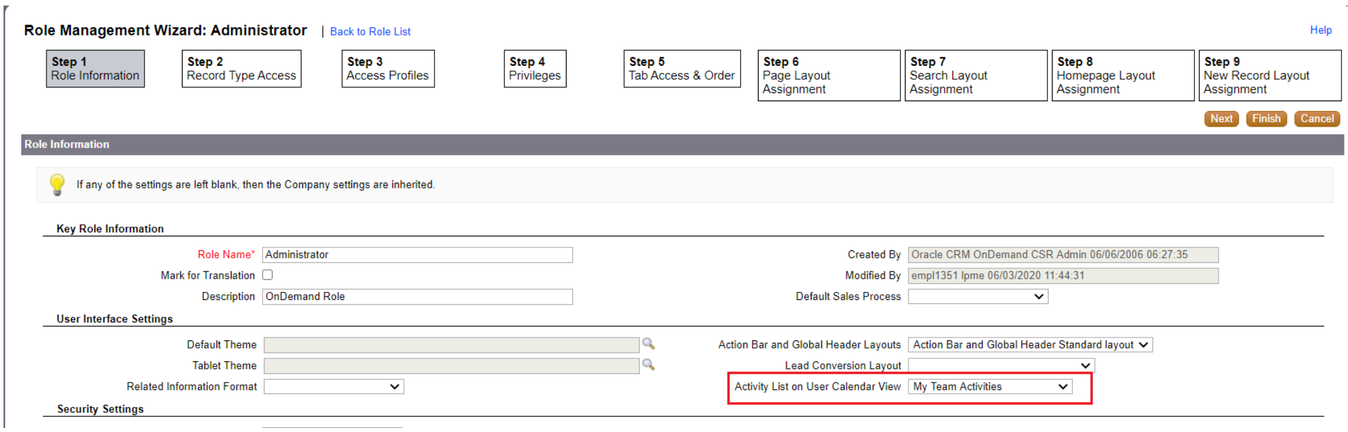
TIPS AND CONSIDERATIONS

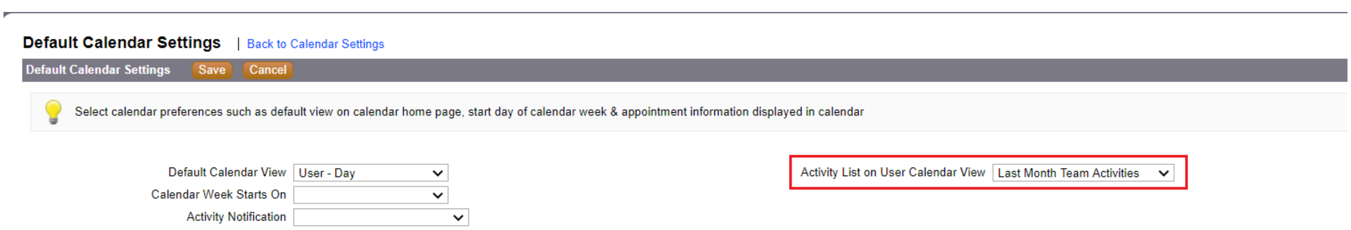
None

Select a Custom Activity List to Display with Calendar

Prior to Release 41, 'My Open Tasks' is displayed on the user's daily and w eekly calendar view s, w hich users cannot change. Starting w ith Release 41, company administrators can choose any available activity list to be displayed w ith the user's w eekly and daily Calendar at the role level. Users can also select their ow n list to display on their Calendar, w hich overrides the role-level settings.

The follow ing tw o illustrations show the role level selection and user level selection on 'Activity List on User Calendar View ' dropdow n list field and the user's Daily calendar page.





STEPS TO ENABLE

There are no steps required to enable the feature

TIPS AND CONSIDERATIONS

» Role level setting: Activity List on User Calendar View is blank by default, Administrators can select one list from all system, customized as public and role specific lists.

» User level setting: Activity List on User Calendar View is blank by default, users can select one from all system, customized public, user's role specific and private lists. User level settings override role level settings.

Update Country Name Swaziland in Oracle CRM On Demand

With Release 41, the country name 'Swaziland' was changed to 'Eswatini' in Oracle CRM on Demand based on ISO standards.

Sl #	Previous Name	Updated Name
1	Swaziland	Eswatini

The updated value is available in Address Country fields and Phone fields.

STEPS TO ENABLE

There are no steps required to enable the feature

TIPS AND CONSIDERATIONS

» Only the display name is changed to 'Eswatini', including translation. The language independent code (LIC) remains as 'Swaziland'.

Update Time zones & DST Mappings

Oracle CRM On Demand last updated the Time zones and DST mappings in 2018. With Release 41, Oracle CRM On Demand uptakes the latest time zone changes complying with the Oracle approved DST v34, so that the time zones are in line with the latest Olson TZ database. The appointments and tasks created in Oracle CRM on Demand will now reflect the correct time zones without any error.

Oracle CRM On Demand has updated the following time zones.

Sl #	Previous TZ Name	New TZ Name	Action Taken in R41
1	(GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London	(GMT+00:00) Dublin, Edinburgh, Lisbon, London	Rename
2	(GMT) Monrovia	(GMT+00:00) Monrovia	Rename
3		GMT+00:00) Sao Tome	New
4	(GMT) Casablanca	(GMT+01:00) Casablanca	Rename
5	(GMT+03:00) Moscow, St. Petersburg, Volgograd	(GMT+03:00) Moscow, St. Petersburg	Rename
6		(GMT+04:00) Volgograd	New
7		(GMT+05:00) Qyzylorda	New
8		(GMT+00:00) Sao Tome	New

STEPS TO ENABLE

There are no steps required to enable the feature

TIPS AND CONSIDERATIONS

None

Web Services

Add Invitee to Contact WS v2.0

The ListOfInvitees is now exposed in Contact Web Services v2.0, allowing the ability to associate the contact to an event as an invitee.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

» Prior to Release 41, Invitees integration events cannot be tracked and failed with error due to ListOfInvitees missing in the Contact Web Services v2.0 schema. In Release 41, the Invitees integration events can now be tracked successfully.

Enable the Ability to Alpha-order Picklists via Web Services

In Release 41, it is now possible to alpha-order picklist values for all supported languages when upserting using the Picklist administrative web service. To perform the alpha-ordering, a new tag OrderAllLanguages is added accepting Y or N values. If OrderAllLanguages is set to Y, the ordering will be performed across all supported languages. The pre-existing tag Order is still mandatory; however, its value is ignored if OrderAllLanguages is set to Y. If OrderAllLanguages is set to N, the value that is set for the pre-existing tag Order will determine the order for each individual language. Prior to Release 41, the alpha-ordering across all supported languages was available only in the UI.

STEPS TO ENABLE

There are no steps to enable this feature.

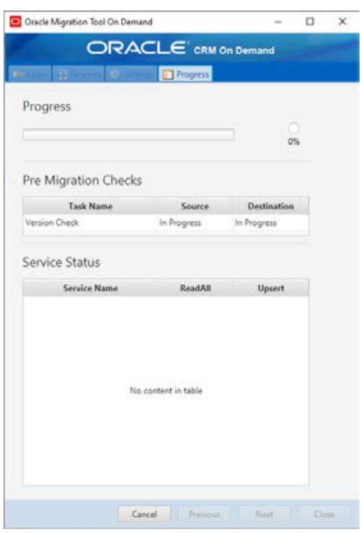
TIPS AND CONSIDERATIONS

None

Graphical User Interface Based Migration Tool Version Check

In Release 40, when executing a migration with the graphical user interface based migration tool, each command that is part of the migration will be executed and if the migration tool is not compatible with the source or destination environments, the tool will log error messages in the log file, for each command executed.

In Release 41, the tool will first perform a version check to ensure the tool's version is compatible with both the source and destination environments. If it is not compatible, a message will pop up to notify the user and no commands will be executed.



The Progress tab of the G.U.I based migration tool with the Pre Migration Checks section

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Support W3C Format for Date and Boolean Fields in Integration Events

Prior to Release 40, Date and Boolean fields are tracked in integration events with formats as per W3C specifications:

- Date: MM/DD/YYY
- Boolean: N or Y

In Release 41, a new setting, 'W3C Format', is introduced for the integration events queue.

When selected, the Date and Boolean fields will be tracked with formats as per W3C specifications:

- Date: YYYY-MM-DD
- Boolean: True, False

STEPS TO ENABLE

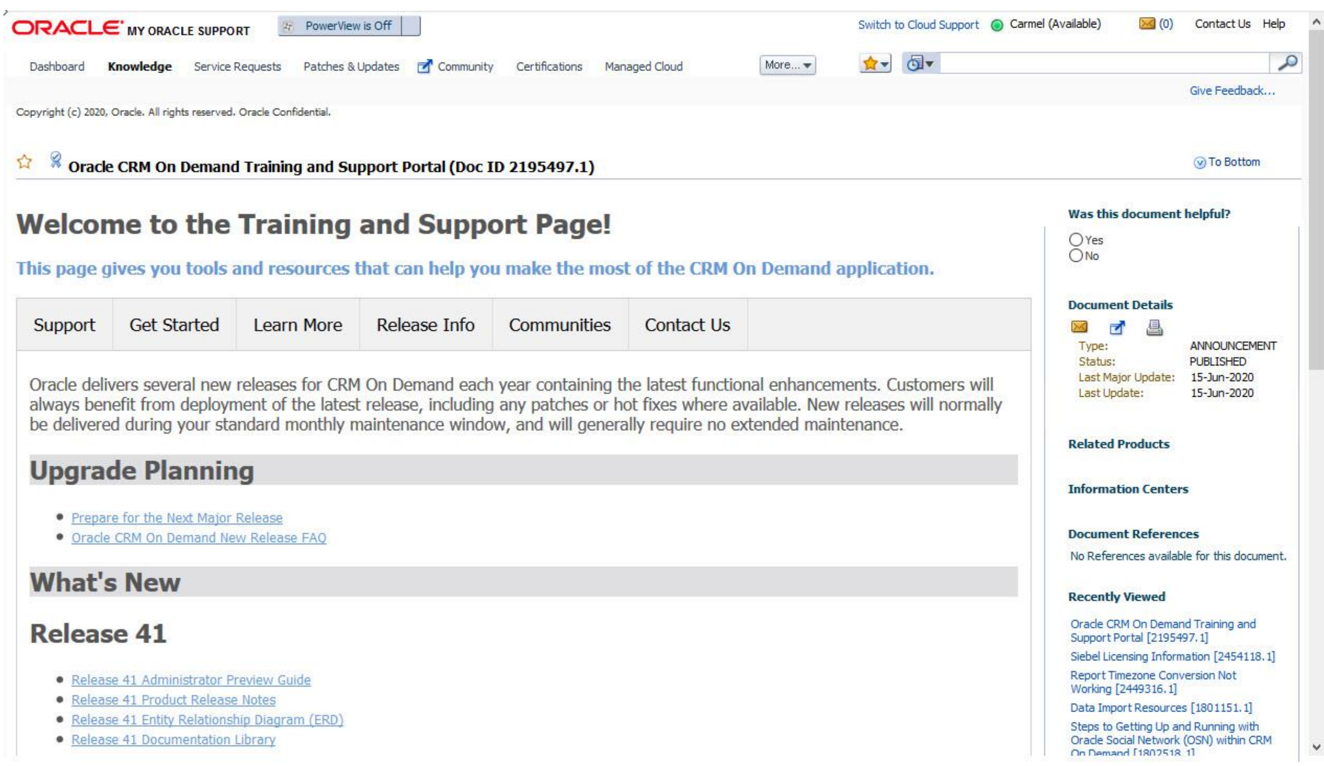
There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

» The setting can be configured when creating the integration event queue. Once a queue is created, the setting will become read only.

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

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 41 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:

https://www.oracle.com/technical-resources/documentation/siebelcrmod.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 41 questions or issues.

Call the toll-free number for your location to contact Oracle 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

CONNECT WITH US

blogs.oracle.com/oracle

facebook.com/oracle

twitter.com/oracle

oracle.com

Integrated Cloud Applications & Platform Services