

ORACLE®

CRM ON DEMAND

Administrator Preview Guide

Release 41

August 2020
VERSION 20200831



ORACLE®

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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		✓		

Administration

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		<input type="checkbox"/>	<input type="checkbox"/>
2	Customer	Customer	Customer		<input type="checkbox"/>	<input type="checkbox"/>
3	Partner	Partner	Partner		<input type="checkbox"/>	<input type="checkbox"/>
4	Prospect	Prospect	Prospect		<input type="checkbox"/>	<input type="checkbox"/>
5	Long Term Care	Long Term Care	Long Term Care		<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	Department Store	Department Store	Department Store		<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	Discount Store	Discount Store	Discount Store		<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	Distributor	Distributor	Distributor		<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Drug Wholesaler	Drug Wholesaler	Drug Wholesaler		<input type="checkbox"/>	<input checked="" type="checkbox"/>
10	Drug/Proprietary Store	Drug/Proprietary Store	Drug/Proprietary Store		<input type="checkbox"/>	<input checked="" type="checkbox"/>
11	Auto/Home Supply Store	Auto/Home Supply Store	Auto/Home Supply Store		<input type="checkbox"/>	<input checked="" type="checkbox"/>
12	Banking	Banking	Banking		<input type="checkbox"/>	<input checked="" type="checkbox"/>
13	Grocery Store	Grocery Store	Grocery Store		<input type="checkbox"/>	<input checked="" type="checkbox"/>
14	HQ	HQ	HQ		<input type="checkbox"/>	<input checked="" type="checkbox"/>
15	Home Center	Home Center	Home Center		<input type="checkbox"/>	<input checked="" type="checkbox"/>
16	Home Electronics Store	Home Electronics Store	Home Electronics Store		<input type="checkbox"/>	<input checked="" type="checkbox"/>
17	Mass Merchandiser	Mass Merchandiser	Mass Merchandiser		<input type="checkbox"/>	<input checked="" type="checkbox"/>
18	Non-Store Retailer	Non-Store Retailer	Non-Store Retailer		<input type="checkbox"/>	<input checked="" type="checkbox"/>
19	On Premises	On Premises	On Premises		<input type="checkbox"/>	<input checked="" type="checkbox"/>
20	Planning Group	Planning Group	Planning Group		<input type="checkbox"/>	<input checked="" type="checkbox"/>
21	Reseller	Reseller	Reseller		<input type="checkbox"/>	<input checked="" type="checkbox"/>
22	Retailer	Retailer	Retailer		<input type="checkbox"/>	<input checked="" type="checkbox"/>
23	Supermarket	Supermarket	Supermarket		<input type="checkbox"/>	<input checked="" type="checkbox"/>

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 window on sign-in window. In this release, Company alerts can be set to be displayed in the global scrolling text bar at the bottom of the screen.

The screenshot shows the 'Account Homepage' interface. At the top, there is a navigation bar with icons for Home, Calendar, Analytics, Accounts, Leads, Contacts, Service, Campaigns, Opportunities, Addresses, Vehicles, and Quote. Below this, the 'Account Homepage' section is divided into several panels:

- Account Lists:** A list of filters including All Accounts, All Customer Accounts, All Account Competitor Accounts, All Account Partner Accounts, All Prospect Accounts, Recently Created Accounts, Recently Modified Accounts, All Referenceable Accounts, All Top Accounts, My Accounts, and Manage Lists.
- My Open Account Related Tasks:** A table with columns for Due Date, Priority, Subject, and Account. It lists various tasks such as 'admin-task1_Updated Customfields', 'Prepare Proposal', and 'Submit Quote'.
- Account Analysis:** A chart titled '# of Accounts with Opportunities' showing data for different Annual Revenue Tiers: 500M - 1B, 50M - 100M, < 10M, > 1B, and Unspecified.

At the bottom of the page, a scrolling text bar displays a 'Microsoft Windows update' and an 'ANNOUNCEMENT'.

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.

The screenshot shows the 'Alerts' page configuration for an alert titled 'ANNOUNCEMENT'. The alert is set to 'Medium' priority and 'COVID-19' as additional information. The 'Scrolling Text Bar' checkbox is checked, indicating that the alert will be displayed in the global scrolling text bar. Other details include the post date (4/11/2020 11:00 PM), expiration date (7/1/2020 11:00 PM), and the displayed hyperlink (COVID-19). The alert description is 'Guidance for Oracle employees relating to COVID-19 (the Coronavirus)'. Below the alert information, there is an 'Attachments' section with a table for listing attachments.

TIPS AND CONSIDERATIONS

- » Users need to navigate away 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 clicking 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.

Notification Information:	
Notification Email Address	<input type="text"/>
Send Warning Email When The Number Of Queued Transactions Reaches	<input type="text"/>

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

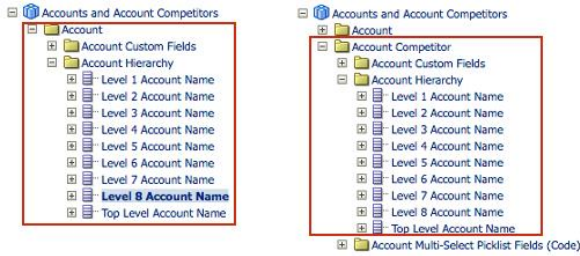
With Release 41, the account hierarchy is exposed in Analytics. The following subject areas are added with the account related hierarchy folders:

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

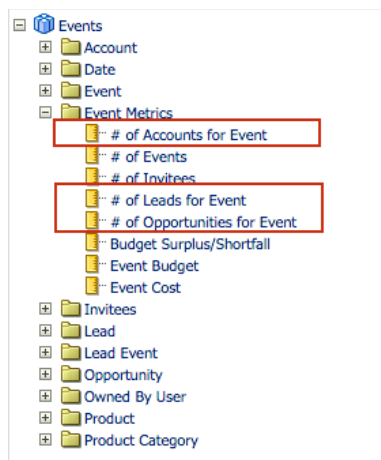
None

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 follows:

- 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.

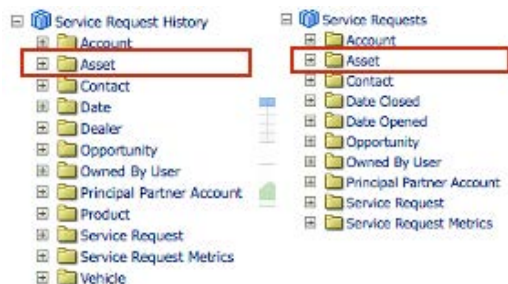
TIPS AND CONSIDERATIONS

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

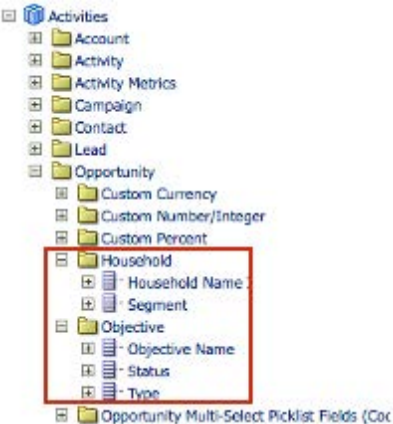
In Release 41, the Household and Objective folders and fields are exposed under the Opportunity dimension in the following subject areas:

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.

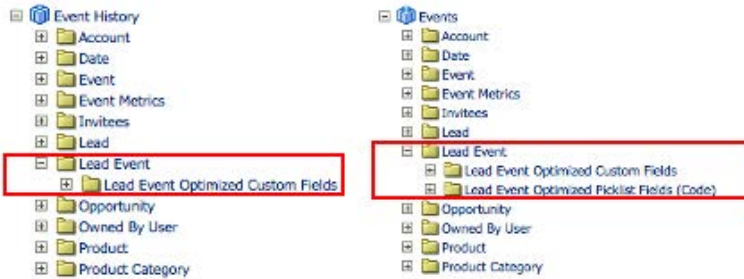
TIPS AND CONSIDERATIONS

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

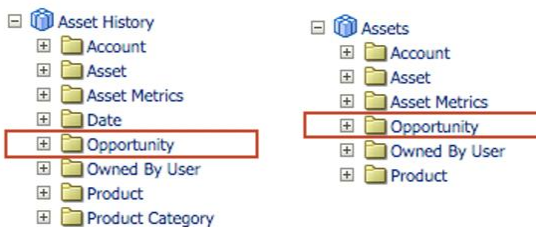
None

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.

The user runs a report that has report prompts; the user enters the value of the report prompt and clicks OK

1. The report displays the results filtered based on the report prompt
2. The user clicks the Action Link (Browser Script) on Account Name

Account Name	Account Type	Annual Revenues	Account ID
B/C, Inc.	Prospect	134,400,000.00 USD	HE4977-1JGDF
Barber Design	Prospect	31,008,000.00 USD	HE4977-1JGWR
Bayview Corp.	Prospect	17,680,000.00 USD	HE4977-1JGUF
Bayview News	Prospect	66,472,000.00 USD	HE4977-1JE13
Castle Company	Prospect	27,180,000.00 USD	HE4977-1JGR3
CC Corporation	Prospect	22,140,000.00 USD	HE4977-1JGWS
Islander Design	Prospect	172,800,000.00 USD	HE4977-1JE1R
J and P Enterprises	Prospect	140,540,000.00 USD	HE4977-1JGR5
Matthew Etna Corp.	Prospect	90,200,000.00 USD	HE4977-1JGHR
Maynard Tools	Prospect	47,600,000.00 USD	HE4977-1JGEP
Miller Developers	Prospect	37,800,000.00 USD	HE4977-1JGER

1. The user navigates to Account Detail page
2. The user clicks Back to Analytics

In Release 41, the user returns to the report results that are filtered based on the prompt value

Account Name	Account Type	Annual Revenues	Account ID
B/C, Inc.	Prospect	134,400,000.00 USD	HE4977-1JGDF
Barber Design	Prospect	31,008,000.00 USD	HE4977-1JGWR
Bayview Corp.	Prospect	17,680,000.00 USD	HE4977-1JGUF
Bayview News	Prospect	66,472,000.00 USD	HE4977-1JE13
Castle Company	Prospect	27,180,000.00 USD	HE4977-1JGR3
CC Corporation	Prospect	22,140,000.00 USD	HE4977-1JGWS
Islander Design	Prospect	172,800,000.00 USD	HE4977-1JE1R
J and P Enterprises	Prospect	140,540,000.00 USD	HE4977-1JGR5
Matthew Etna Corp.	Prospect	90,200,000.00 USD	HE4977-1JGHR
Maynard Tools	Prospect	47,600,000.00 USD	HE4977-1JGEP
Miller Developers	Prospect	37,800,000.00 USD	HE4977-1JGER

Before Release 41, the user returns to the report prompts page, and the value of the prompt is lost

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.

1. The user runs a dashboard that has dashboard action links that navigate to other reports
2. The user clicks on the action link that navigates to a report without prompts

1. The dashboard displays the results of the report
2. The user clicks the Action Link (Browser Script) on Account Name

Account Name	Account Type	Annual Revenues
ACME Computer Parts	Customer	1,500,000,000.00 USD
Action Rentals	Customer	124,800,000.00 USD
Action Rentals 2	Customer	124,800,000.00 USD
Armex Corp.	Customer	238,400,000.00 USD
B/C, Inc.	Prospect	134,400,000.00 USD
Barber Design	Prospect	31,008,000.00 USD
Bay Advertising	Customer	10,080,000.00 USD
Bay Delivery	Customer	196,800,000.00 USD
Bayla Brothers	Customer	66,000,000.00 USD
Bayview Corp.	Prospect	17,680,000.00 USD
Big Industry Inc.	Prospect	2,500,000,000.00 USD

1. The user navigates to Account Detail page
2. The user clicks Back to Analytics

In Release 41, the user returns to the report results

Account Name	Account Type	Annual Revenues
ACME Computer Parts	Customer	1,500,000,000.00 USD
Action Rentals	Customer	124,800,000.00 USD
Action Rentals 2	Customer	124,800,000.00 USD
Armex Corp.	Customer	238,400,000.00 USD
B/C, Inc.	Prospect	134,400,000.00 USD
Barber Design	Prospect	31,008,000.00 USD
Bay Advertising	Customer	10,080,000.00 USD
Bay Delivery	Customer	196,800,000.00 USD
Bayla Brothers	Customer	66,000,000.00 USD
Bayview Corp.	Prospect	17,680,000.00 USD
Big Industry Inc.	Prospect	2,500,000,000.00 USD

Before Release 41, the user returns to the dashboard page that has the dashboard action links

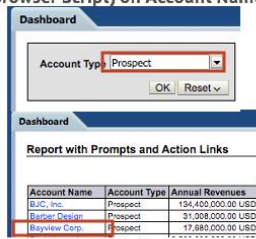
Note: The same functionality is available if the dashboard contains Link or Image objects instead of dashboard action links

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.

1. The user runs a dashboard that has dashboard action links that navigate to other reports
2. The user clicks on the action link that navigates to a report with prompts

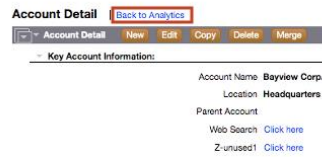


1. The dashboard displays the report prompt; User enters the value of the report prompt and clicks OK
2. The report displays the results filtered based on the report prompt
3. The user clicks the Action Link (Browser Script) on Account Name

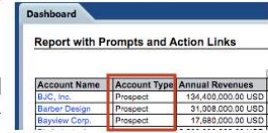


Note: The same functionality is available if the dashboard contains Link or Image objects instead of dashboard action links

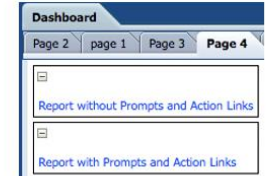
1. The user navigates to Account Detail page
2. The user clicks Back to Analytics



In Release 41, the user returns to the report results that are filtered based on the prompt value



Before Release 41, the user returns to the dashboard page that has the dashboard action links



STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

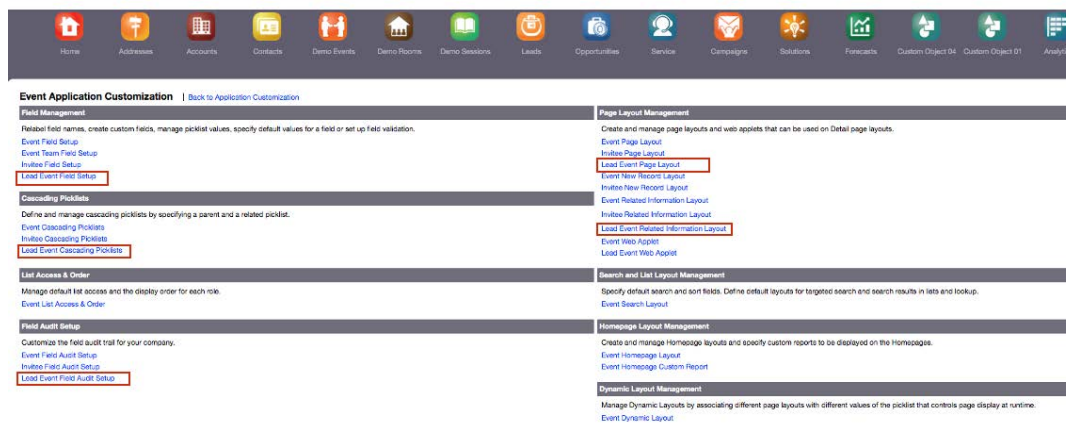
None

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.

Admin > Application Customization > Event



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:

Event Field Edit | [Back to Event Fields](#) [Help](#) | [Printer Friendly](#)

[Save](#) [Cancel](#)

 Enter a display name and field type for new fields or modify the display name of existing fields. Note that once a field is created, its field type cannot be modified. In addition, you can define Required, Read Only and Default Value properties, and specify custom validation rules for non-system fields. If a property is grayed out, the functionality does not apply for this record type.

Key Information

Display Name* <input type="text" value="Event RI Pick"/>	Field Type* <input type="text" value="Picklist"/>
Mark for Translation <input type="checkbox"/>	
Enable Related Information <input type="checkbox"/>	Shared Record Type* <input type="text" value="Account"/>
Enable Shared Picklist Values <input checked="" type="checkbox"/>	Shared Field* <input type="text" value="Route"/>
Enable Related Information <input checked="" type="checkbox"/>	Related Record Type* <input type="text" value="Campaign"/>
Enable Shared Picklist Values <input type="checkbox"/>	Related Field* <input type="text" value="Status"/>

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.

Account: Default Filter Criteria | [Back to Related Information Section](#)

New Default Filter Criteria			
	Related Record Type	Default Filter Criteria Field	Default Filter Criteria Condition
Edit ▾	Contacts	Currency	Equal to
Edit ▾	Opportunities	Opportunity Type	Equal to
Edit ▾	Quotes	Owner	Equal to

Default Filter Criteria Edit | [Back to Account: Default Filter Criteria](#)

[Save](#) [Cancel](#)

The default filter criteria configured here will apply to the related information section layouts (including standard layout) for the selected related record type. At runtime, the field selected related record type.

Related Record Type*

*= Required Field

WARNING: If the selected field is part of the "Not Available Search Fields" list in the User's as... criteria will not apply for the user.

[Save](#) [Cancel](#)

Call Activity History

Calls

Claims

Completed Activities

Custom Objects 01

Financial Accounts

Contacts is not in this list

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.



Opportunity Detail: 1000 M134 Graphics Accel... | [Back to My Homepage](#) [Edit Layout](#) | [Help](#) | [Printer Friendly](#)

Opportunity Details [New](#) [Edit](#) [Copy](#) [Delete](#) [Coach](#) [Assets](#)

Key Opportunity Information:

Opportunity Name	1000 M134 Graphics Accelerators	Revenue	\$0.00
Account	ACME Computer Parts	Close Date	9/8/2008
Sales Stage	Short List	Forecast	<input checked="" type="checkbox"/>
Next Step		Opportunity Currency	USD

Sales Detail Information:

Status	Pending	Probability %	70
Priority	Medium	Expected Revenue	\$0.00
Lead Source		Reason Won/Lost	
		Opportunity Type	

Additional Information:

Owner	Admin user	Modified External	analyticstro10 admin admin user 9/1/2008 01:57 AM
Book	analyticstro10 admin admin user	Created External	analyticstro10 admin admin user 9/1/2008 01:57 AM
Description			

Assets

[New](#)

AB 09 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z [Advanced](#)

	Product Name	Serial #	Quantity	Type	Status	Purchase Date	Purchase Price	Expiration Date	Notify Date
Edit	Araclid	AD00001	100	Sample	Beta	3/24/2020	£350.00	6/24/2020	5/23/2020
Edit	Asthalin	AL90002	10	Sample	Active	4/24/2020	£835.00	6/24/2020	5/23/2020

AB 09 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

[Show Full List](#) Number of records displayed | 5

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 on 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 with Release 41, Custom Object 01-40 can be associated with Assets and users can manage Custom Objects directly from Asset Detail page.

The following two illustrations show Custom Object 02 and other Custom Objects are displayed as children of Asset on Asset detail page

Page Layout Wizard: Asset: Asset with RI | [Back to Asset Page Layout](#) [Help](#)

Step 1 Layout Name **Step 2** Field Setup **Step 3** Field Layout **Step 4** Related Information **Step 5** Related Information Layout

[Previous](#) [Next](#) [Finish](#) [Cancel](#)

Related Information

<p>Not Available Information</p> <ul style="list-style-type: none"> Audit Trail Custom Objects 05 Custom Objects 06 Custom Objects 07 Custom Objects 08 Custom Objects 09 Custom Objects 10 Custom Objects 11 	<p>Available Information</p>	<p>Displayed Information</p> <ul style="list-style-type: none"> Service Requests Custom Objects 01 Custom Objects 02 Custom Objects 03 Custom Objects 04 Custom Objects 39 Custom Objects 40
--	-------------------------------------	--

[Previous](#) [Next](#) [Finish](#) [Cancel](#)



Asset Detail: AD00001 | Back to Asset Page Layout

Asset Details | New | Edit | Copy | Delete

Key Asset Information:

Product Name: Aracid	Product Category: DEF CATEGORY
Serial #: AD00001	Part #: 12333
Purchase Date: 3/24/2020	Type: Sample
Purchase Price: £350.00	Status: Beta
Quantity: 100	Warranty:
Ship Date: 5/24/2020	Contract:
Notify Date: 5/23/2020	Currency: GBP

Additional Information:

Opportunity: 1000 M134 Graphics Accelerators
 Owner: Admin user
 Modified: analyticsrto10 admin admin user 6/25/2020 07:06 AM
 Created External: Admin user 6/24/2020 09:18 PM

Description

Custom Objects 02

Name	Type	Quick Search 1	Quick Search 2	Indexed Currency	Indexed Date	Owner	Modified: Date
adv-CO2	Open			\$4,546.00	9/22/2008 02:45 AM	adv user	1/17/2019 01:54 AM
adv_co2_1	Open	qqqq	qqq	\$4,546.00	9/22/2008 02:45 AM	adv user	8/11/2011 10:45 PM

Number of records displayed: 5

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

Page Layout Wizard: Asset: Asset with RI | Back to Asset Page Layout

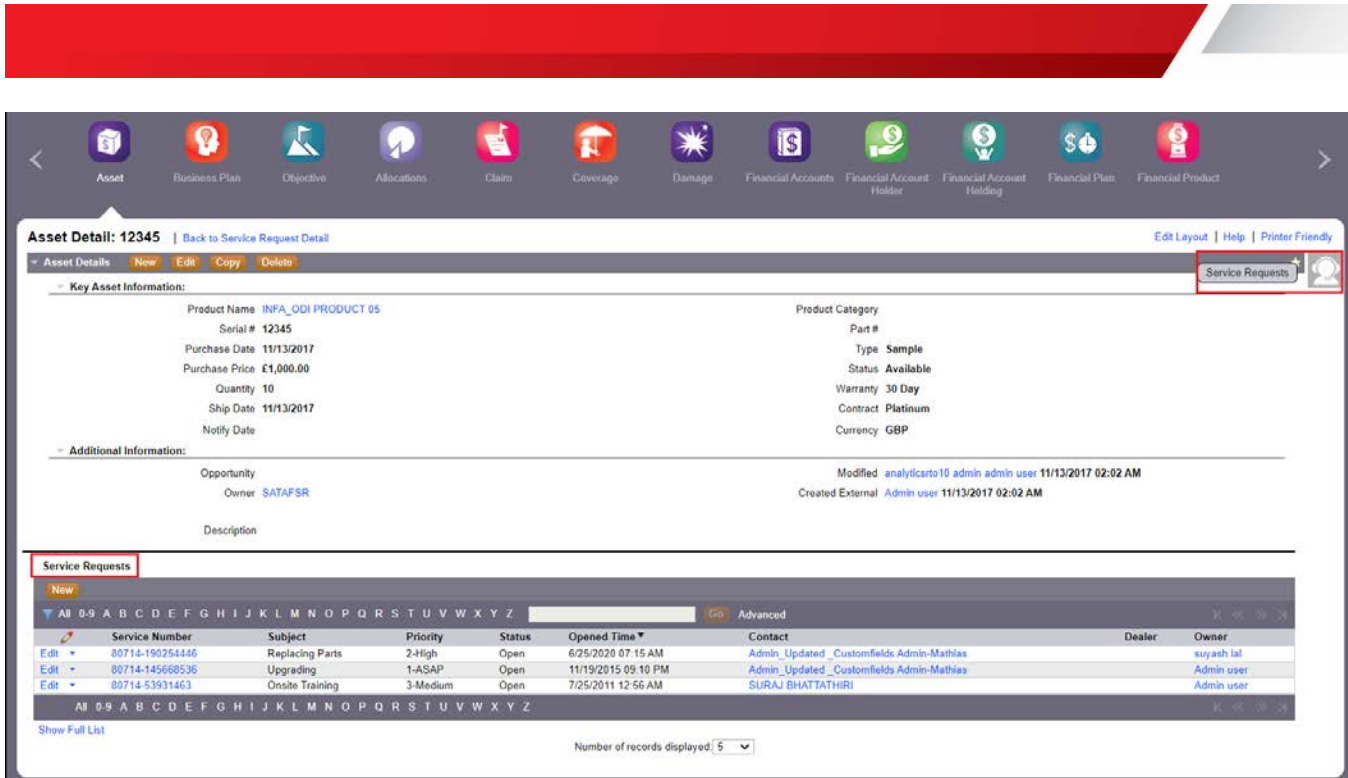
Step 1: Layout Name | Step 2: Field Setup | Step 3: Field Layout | Step 4: Related Information | Step 5: Related Information Layout

Previous | Next | Finish | Cancel

Related Information

Not Available Information	Available Information	Displayed Information
Audit Trail Custom Objects 05 Custom Objects 06 Custom Objects 07 Custom Objects 08 Custom Objects 09 Custom Objects 10 Custom Objects 11	Custom Objects 01 Custom Objects 02 Custom Objects 03 Custom Objects 04 Custom Objects 39 Custom Objects 40	Service Requests

Previous | Next | Finish | Cancel



STEPS TO ENABLE

There are no steps required to enable the feature.

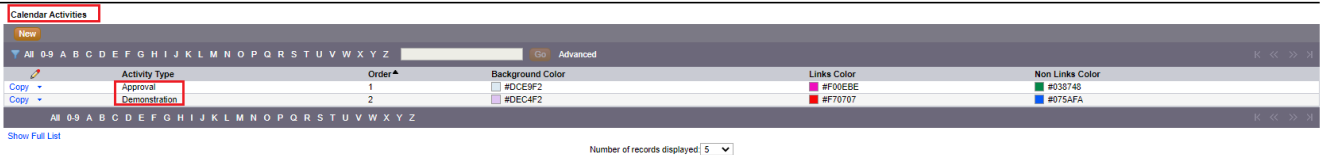
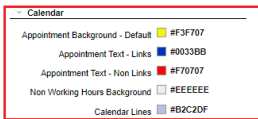
TIPS AND CONSIDERATIONS

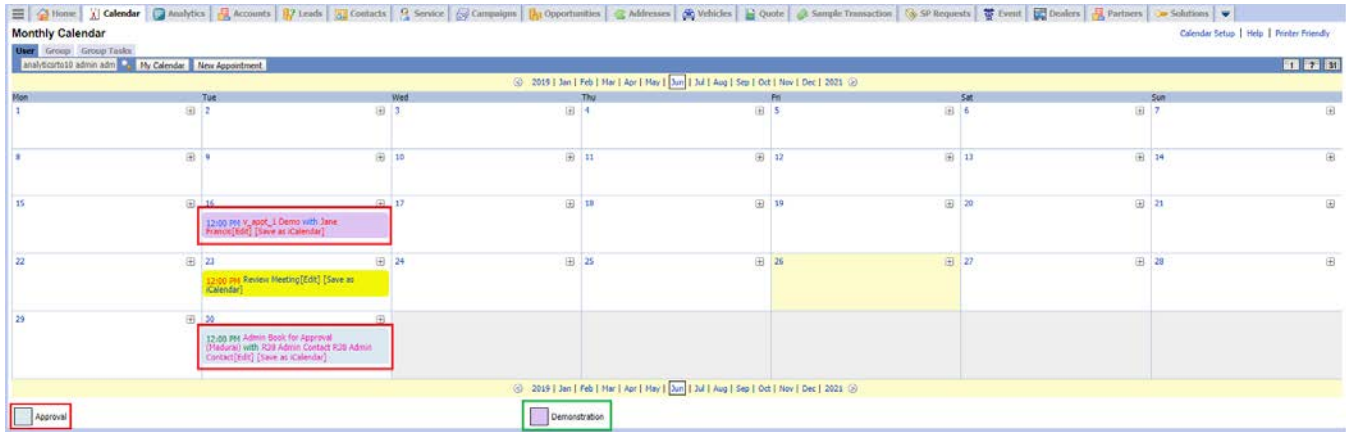
To allow a user to add and update Service Requests from the Asset Detail page, administrators need to ensure the access level for Asset > Service Requests is granted in the Access Profile and the Service Requests is selected to be displayed in the Related Information list in Asset Page Payout for the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

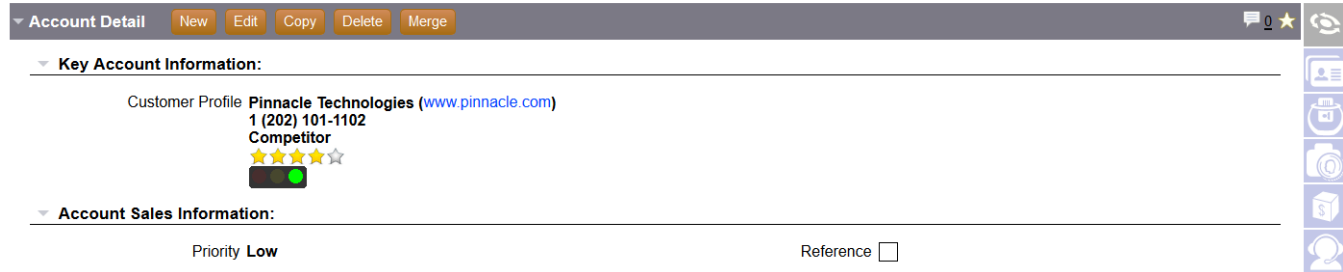
Administrators create customized themes based on the out-of-the-box classic theme for company users.

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.

Account Detail: Pinnacle Technologies | [Back to Account Homepage](#)

[Edit Layout](#) | [Help](#) | [Printer Friendly](#)



A concatenated field with the phone and visual indicators fields

STEPS TO ENABLE

There are no steps to enable this feature.

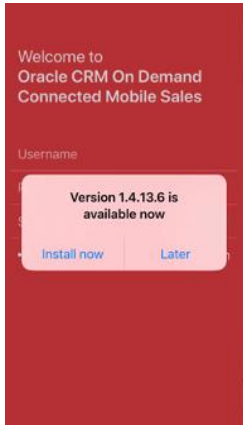
TIPS AND CONSIDERATIONS

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

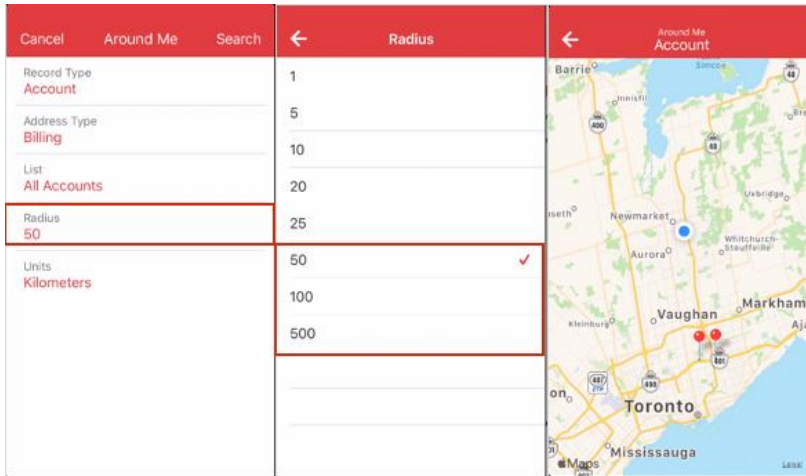
There are no steps to enable this feature.

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.

The screenshot shows the 'Edit Fields' dialog box at the top. The 'Field Display Name' is 'Account Billing Address'. The 'Account Fields' dropdown is set to 'Account Billing Address'. The 'Display Text' field contains the following concatenation: `%%&Bil.To.ADDR.Address1%%&Bil.To.PROVINCE.Province%%&Bil.To.CITY.City%%&Bil.To.COUNTRY.Country%%&`. Below the dialog is the 'Account Detail: CST' page. The 'Key Account Information' section shows: Account Name: CST, Account Billing Address: 2235 Sheppard Ave E, ON, North York, Canada (with a map icon), Location, Account Type: Customer, Priority: Medium, Industry: High Technology, and Region: Central.

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.

The screenshot shows the 'Edit Fields' dialog box at the top. The 'Field Display Name' is 'Account Billing/Shipping Address'. The 'Account Fields' dropdown is set to 'Account Billing/Shipping Address'. The 'Display Text' field contains the following concatenation: `%%&Bil.To.ADDR.Address1%%&Bil.To.PROVINCE.Province%%&Bil.To.CITY.City%%&Bil.To.COUNTRY.Country%%&Shp.To.ADDR.Address1%%&Shp.To.PROVINCE.Province%%&Shp.To.CITY.City%%&Shp.To.COUNTRY.Country%%&`. Below the dialog is the 'Account Detail: CST' page. The 'Key Account Information' section shows: Account Name: CST, Account Billing/Shipping Address: 2235 Sheppard Ave E, ON, North York, Canada 4800 Keele St., ON, North York, Canada (with a map icon), Location, Account Type: Customer, Priority: Medium, Industry: High Technology, and Region: Central. On the right side, there are two address popups: 'Billing' (2235 Sheppard Ave E, North York, ON, M2J 1K6) and 'Shipping' (4800 Keele St., North York, ON, M3J 3K1).

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

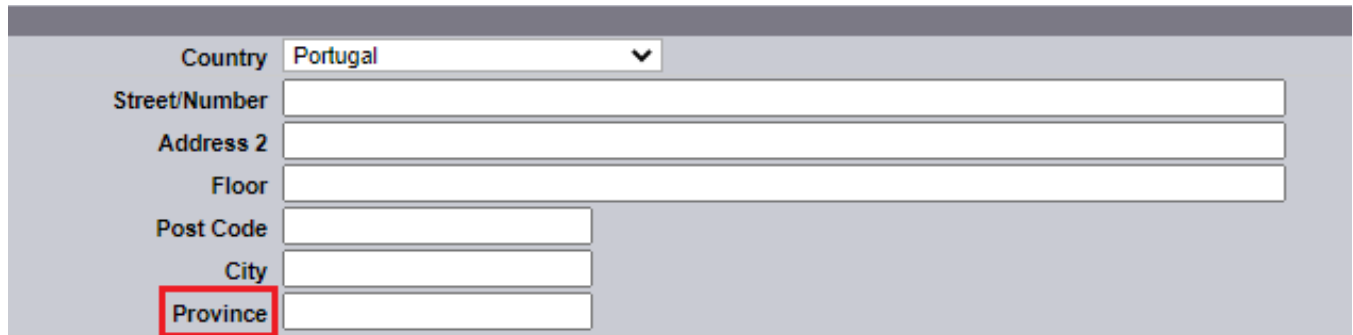
There are no steps to enable this feature.

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.



Country	Portugal
Street/Number	
Address 2	
Floor	
Post Code	
City	
Province	

STEPS TO ENABLE

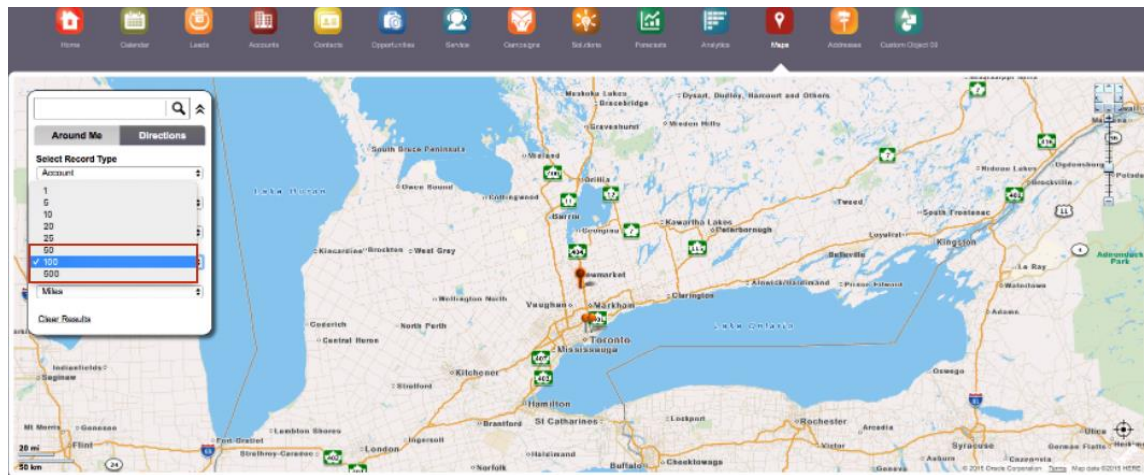
There are no steps required to enable the feature

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

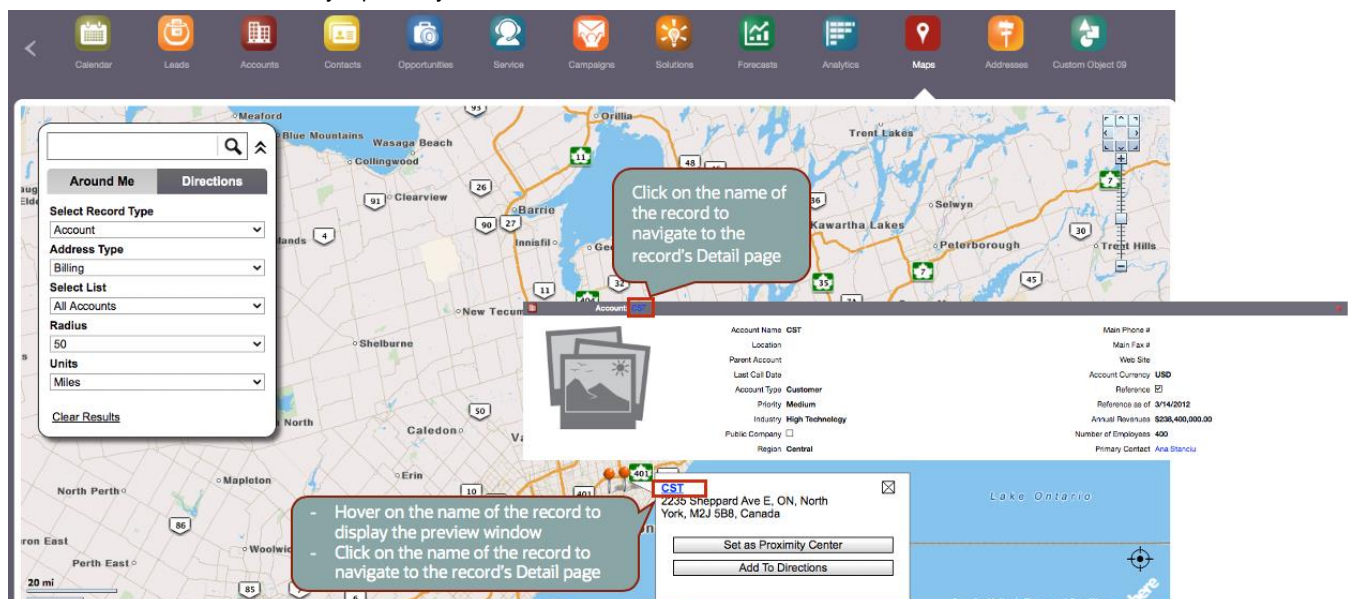
There are no steps required to enable the feature

TIPS AND CONSIDERATIONS

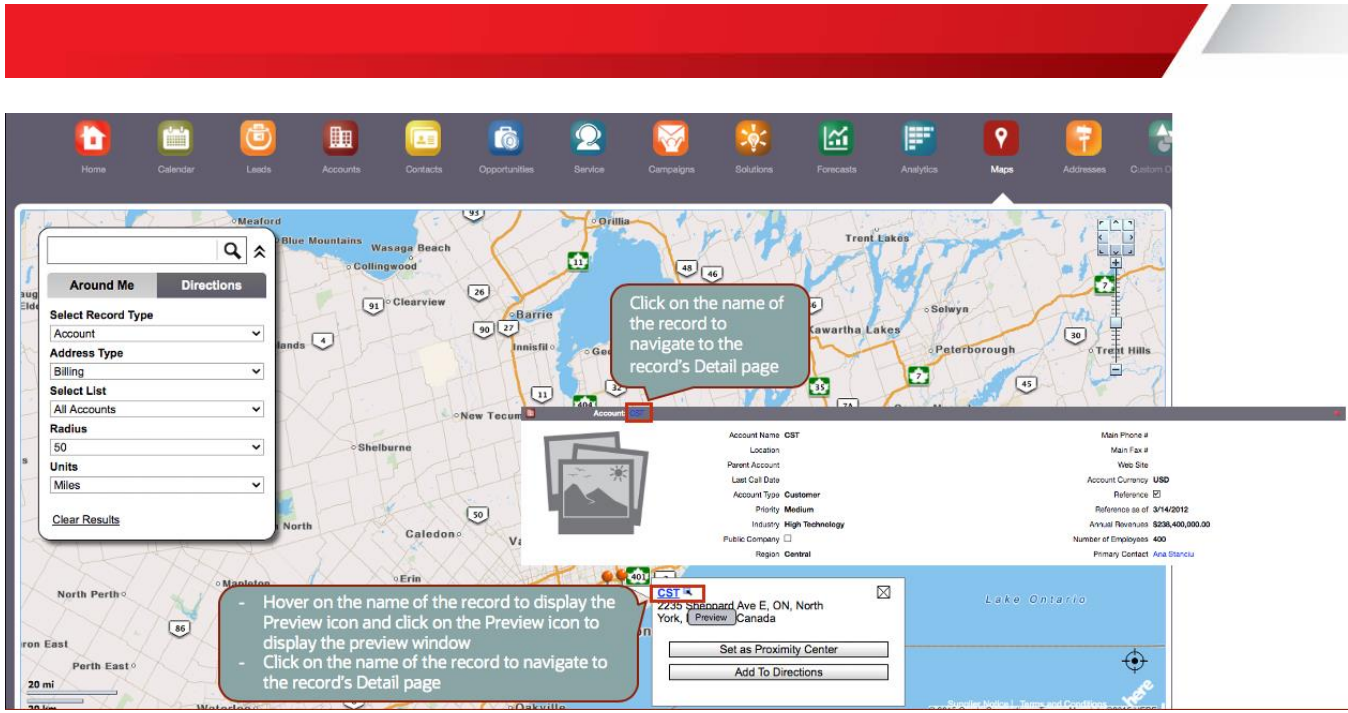
None

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:

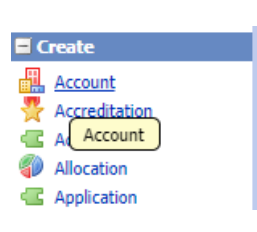
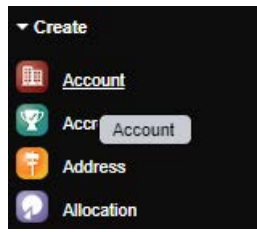
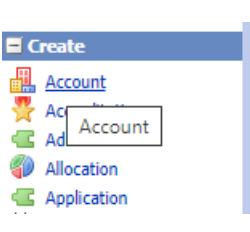
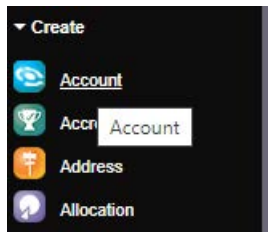
Mouse over Account:

Modern Theme

Classic Theme

Modern Theme

Classic Theme



Release 40

Release 41

Mouse over link Modern Theme:

Dashboard Weblink [Click here](#)

Release 40 →

```
https://crmdeat-pod2.us.oracle.com/OnDemand/user/ReportIFrameView?SAWDetailViewURL=saw.dll?PortalPages&PortalPath=%2Fshared%2FCompany_1281_Shared_Folder%2F_portal%2FAllDashboardObjects10g&weblink=true
```

Dashboard Weblink [Click here](#)

Release 41 →

```
https://crmdeat-pod3.us.oracle.com/OnDemand/user/ReportIFrameView?SAWDetailViewURL=saw.dll?PortalPages&PortalPath=%2Fshared%2FCompany_1281_Shared_Folder%2F_portal%2FAllDashboardObjects10g&weblink=true
```

Mouse over link Classic Theme:

Dashboard Weblink [Click here](#)

Release 40 →

```
https://crmdeat-pod2.us.oracle.com/OnDemand/user/ReportIFrameView?SAWDetailViewURL=saw.dll?PortalPages&PortalPath=%2Fshared%2FCompany_1281_Shared_Folder%2F_portal%2FAllDashboardObjects10g&weblink=true
```

Dashboard Weblink [Click here](#)

Release 41 →

```
https://crmdeat-pod3.us.oracle.com/OnDemand/user/ReportIFrameView?SAWDetailViewURL=saw.dll?PortalPages&PortalPath=%2Fshared%2FCompany_1281_Shared_Folder%2F_portal%2FAllDashboardObjects10g&weblink=true
```

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.

Opportunity Detail: Blue Lake Services - (17... | [Back to Opportunity List](#))

Opportunity Name: Blue Lake Services - (17) Phoenix 3000
Account: Blue Lake Services
Sales Stage: Building Vision
Sales Method - Translation: Default Sales Process
Next Step

Status
Priority
Lead Source

Note 1: Step 1: **Need to schedule a Demo for this opportunity**
Step 2: **Need to follow up with my manager who I should re-assign this opportunity**

Note 2: **Please contact Lisa Jones for more details regarding this opportunity.**

Owner

Description: **Next Steps: This opportunity needs to be re-assigned to Joanne.**

Opportunity Detail: Blue Lake Services - (17... | [Back to Opportunity List](#))

Opportunity Name: Blue Lake Services - (17) Phoenix 3000
Account: Blue Lake Services
Sales Stage: Building Vision
Sales Method - Translation: Default Sales Process
Next Step

Status
Priority
Lead Source

Note 1: **B I U** [HTML Editor]
Step 1: **Need to schedule a Demo for this opportunity**
Step 2: **Need to follow up with my manager who I should re-assign this opportunity.**

Note 2: [HTML Editor]

Owner

Description

Contacts: Add Edit

16047

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.

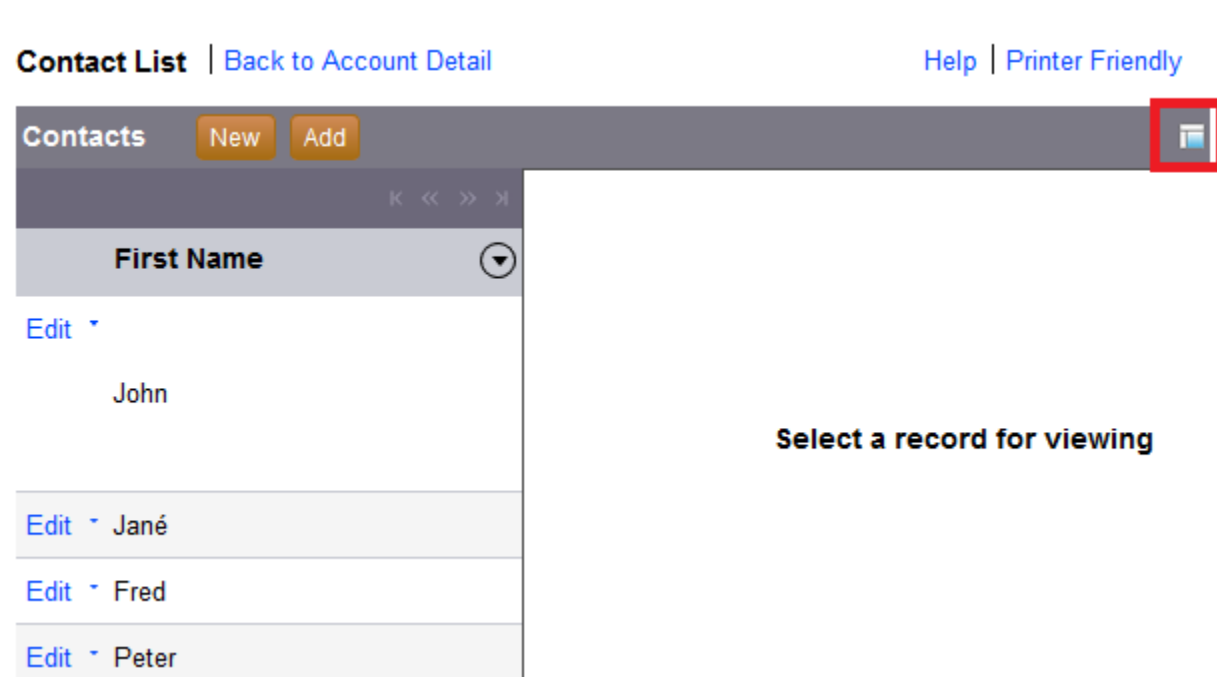
TIPS AND CONSIDERATIONS

- » 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.

Account Page Layout | [Back to Account Application Customization](#)

New Layout	
Name	
Copy	Account Page Standard Layout
Edit ▾	Layout - # of Physicians RO and Location Required
Edit ▾	Layout - # of Physicians Required and Location RO

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.

Dynamic Layout Wizard: Account: Dynamic Layo... | [Back to Account Dynamic Layout](#) [Help](#)

Step 1 Specify Name **Step 2** Assign Layouts

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

Specify Name

The Account Detail and Account Edit pages may require process driven layouts - i.e. the page layouts must change dynamically based on the values of a specific field. Please specify a name for the Dynamic Layout and a picklist field whose values will determine which layout is seen by the users. Additionally, please specify a default Layout name.

Specify Name

Dynamic Layout Name*

Driving Picklist*

Default Layout*

Dynamic Layout Wizard: Account: Dynamic Layo... | [Back to Account Dynamic Layout](#) [Help](#)

Step 1 Specify Name **Step 2** Assign Layouts

[Previous](#) [Finish](#) [Cancel](#)

Assign Layouts

Associate each of the picklist values with a layout name; the layout you pick will be displayed when a record has the corresponding picklist value.

Field Type	Layout Name*
Competitor	Layout - # of Physicians Required and Location RO 1
Customer	Layout - # of Physicians RO and Location Required 1
Partner	Layout - # of Physicians RO and Location Required 1
Prospect	Layout - # of Physicians Required and Location RO 1

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'.

Mass Update Step 1

Update Accounts | [Back to Account List](#)

Step 1 of 2: Select the records you would like to update

Account Name	Account Type	# Physicians	Location	Priority	Industry	Owner
<input checked="" type="checkbox"/> ACME COMPUTER PARTS	Customer		New York	Medium		admin
<input checked="" type="checkbox"/> MD Systems 2	Customer	11	Toronto	Medium	Energy	
<input checked="" type="checkbox"/> MD Systems 3	Customer	12	Toronto	Medium	Energy	

Select All Clear All

Mass Update Step 2

Update Accounts | [Back to Account List](#)

Step 2 of 2: Set the values to update on the selected records

Account Field	Value
Account Type	Partner
# Physicians	100

Mass Update Results

Update Accounts | [Back to Account List](#)

Mass Update Results | [Back to List](#)

The following records could not be updated

Account	Reason
MD Systems 3	Access denied. The "# Physicians" field is set to read-only in the Account "Layout - # of Physicians RO and Location Required" page layout.
MD Systems 2	Access denied. The "# Physicians" field is set to read-only in the Account "Layout - # of Physicians RO and Location Required" page layout.
ACME COMPUTER PARTS	Access denied. The "# Physicians" field is set to read-only in the Account "Layout - # of Physicians RO and Location Required" page layout.

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. However, the layout associated with 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 when clicking Finish in Step 2. Similar errors are encountered if the user wants to update Location to a null value, since the layout for Partner account type enforces the Location to be required as well.

Merge Step 1

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

Step 1 of 3: Find Accounts to Merge

Primary Account: ACME COMPUTER PARTS

Duplicate Account 1: MD Systems 1

*: Required Field

Merge Step 2

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

Step 2 of 3: Select the Values to retain on the Merged Account

Select the values you would like saved to the merged record. Once merged, the duplicate Account will be deleted from the system. Any records related to the duplicate record will be transferred to the merged record.

Account Name	Primary Account	Duplicate Account 1	Value to Save
Account Name	ACME COMPUTER PARTS	MD Systems 1	ACME COMPUTER PART
Bill To Address Id	1QA2-313WQD	1QA2-30HK3G	1QA2-313WQD
Created Date	4/27/2016 07:47:07 AM	6/14/2016 09:32:06 AM	4/27/2016 07:47:07 AM
Modified Date	5/8/2020 09:59:52 AM	5/8/2020 10:03:09 AM	5/8/2020 09:59:52 AM
Row Id	1QA2-2YY3FO	1QA2-30BE47	1QA2-2YY3FO
Ship To Address Id	1QA2-30HTER	1QA2-30HK3E	1QA2-30HTER
Account Currency	USD		
Account Type	Distributor	Partner	Partner
Annual Revenues	\$1,500,000.00	\$10,000.00	\$1,500,000.00
Book	Ana Stanciu		Ana Stanciu
Description	Online reseller of computer component	description	Online reseller of comput
Industry	Energy		
Location	Toronto		

In the illustration above, the user performs a Merge operation between two 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', which 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 without a value. However, the layout associated with the Partner account type is 'Layout - # of Physicians RO and Location Required', therefore when 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 will be completed and the user does not receive an error, however the # of Physicians field will not be updated with the new value since it is read-only as per layout definition.

Transition State Edit | [Back to Process Details](#)

Transition State Details **Save** **Cancel**

Key Status Information

State: **Completed**

Category: _____

Description: _____

Created: Ana Stanciu 6/16/2016 06:53 PM

Modified: Ana Stanciu 6/15/2016 02:59 PM

Status Validation

Correlation: [Comment] IS NOT NULL AND [SR Number] IS NOT NULL

Error Message: _____

Record Access Control

Disable Update

Disable Delete/Remove

Save **Cancel**

Mass Update Step 1

Update Activities | [Back to Activity List](#)

Step 1 of 2: Select the records you would like to update

Subject	Status	Type	Start Time	End Time	Owner
<input checked="" type="checkbox"/> Meeting with Lisa Jones			6/22/2016 12:00:00 PM	6/22/2016 01:00:00 PM	Ana Stanciu
<input checked="" type="checkbox"/> Meeting with John Smith to discuss terms		Meeting	4/27/2016 12:00:00 PM	4/27/2016 01:00:00 PM	Ana Stanciu
<input checked="" type="checkbox"/> Initial Meeting with Peter Piper		Meeting	4/23/2016 03:30:00 PM	4/27/2016 05:45:00 PM	Ana Stanciu
<input type="checkbox"/> Demo new appointment	Completed		6/12/2016 12:00:00 PM	6/12/2016 01:00:00 PM	Ana Stanciu
<input type="checkbox"/> Demo new appointment	Completed		6/12/2016 12:00:00 PM	6/12/2016 01:00:00 PM	Ana Stanciu

In addition, with this feature, the Step 1 of Mass Update page is enhanced so certain records cannot be selected using the checkboxes beside the records which are locked based on the rules and states defined in 'Process Administration' module, in the 'Transition State Edit' page shown 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.

Access Profile Wizard: Administrator Owner ... | [Back to Access Profile List](#)

Step 1: Access Profile Name

Step 2: Specify Access Levels

Specify Access Levels

Specify the access levels for each record types listed below. Click the Related Information link to set the access for related items.

Record Type	Access Level	Related Information
Account	Read/Edit/Delete	Related Information
Account Event	Read/Edit/Delete	Related Information
Activity	Read-Only	Related Information

Mass Update Step 1

Update Activities | [Back to Activity List](#)

Step 1 of 2: Select the records you would like to update

Subject	Status	Type	Start Time	End Time	Owner
<input type="checkbox"/> Meeting with Lisa Jones			6/22/2016 12:00:00 PM	6/22/2016 01:00:00 PM	Ana Stanciu
<input type="checkbox"/> Meeting with John Smith to discuss terms		Meeting	4/27/2016 12:00:00 PM	4/27/2016 01:00:00 PM	Ana Stanciu
<input type="checkbox"/> Initial Meeting with Peter Piper		Meeting	4/23/2016 03:30:00 PM	4/27/2016 05:45:00 PM	Ana Stanciu
<input type="checkbox"/> Demo new appointment	Completed		6/12/2016 12:00:00 PM	6/12/2016 01:00:00 PM	Ana Stanciu
<input type="checkbox"/> Demo new appointment	Completed		6/12/2016 12:00:00 PM	6/12/2016 01:00:00 PM	Ana Stanciu

Also, with 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 wizard. 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 weekly calendar views, which users cannot change. Starting with Release 41, company administrators can choose any available activity list to be displayed with the user's weekly and daily Calendar at the role level. Users can also select their own list to display on their Calendar, which overrides the role-level settings.

The following two illustrations show the role level selection and user level selection on 'Activity List on User Calendar View' dropdown list field and the user's Daily calendar page.

Role Management Wizard: Administrator | [Back to Role List](#)

[Help](#)

Step 1
Role Information

Step 2
Record Type Access

Step 3
Access Profiles

Step 4
Privileges

Step 5
Tab Access & Order

Step 6
Page Layout
Assignment

Step 7
Search Layout
Assignment

Step 8
Homepage Layout
Assignment

Step 9
New Record Layout
Assignment

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

Role Information

If any of the settings are left blank, then the Company settings are inherited.

Key Role Information

Role Name* Administrator

Created By Oracle CRM OnDemand CSR Admin 06/06/2006 06:27:35

Mark for Translation

Modified By empl1351 lpme 06/03/2020 11:44:31

Description OnDemand Role

Default Sales Process

User Interface Settings

Default Theme

Action Bar and Global Header Layouts Action Bar and Global Header Standard layout

Tablet Theme

Lead Conversion Layout

Related Information Format

Activity List on User Calendar View My Team Activities

Security Settings

Daily Calendar

[Calendar Setup](#) | [Help](#) | [Printer Friendly](#)

empl1351 lpme [Menu](#)

< Thursday, June 25, 2020 >

June 2020							July 2020						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6				1	2	3	4	
7	8	9	10	11	12	13	5	6	7	8	9	10	11
14	15	16	17	18	19	20	12	13	14	15	16	17	18
21	22	23	24	25	26	27	19	20	21	22	23	24	25
28	29	30					26	27	28	29	30	31	

My Team Activities [New](#)

Due Date	Priority	Subject
5/30/2020		Asset Product 2 requires follow-up
5/2/2020		Asset Product 4 requires follow-up
5/1/2020		Asset Product 5 requires follow-up
6/15/2006		Review a friendly product Tutorial
6/8/2006		Siebel CRM OnDemand kick-off

[Show Full List](#)

Default Calendar Settings | [Back to Calendar Settings](#)

Default Calendar Settings [Save](#) [Cancel](#)

Select calendar preferences such as default view on calendar home page, start day of calendar week & appointment information displayed in calendar

Default Calendar View User - Day

Activity List on User Calendar View Last Month Team Activities

Calendar Week Starts On

Activity Notification

Daily Calendar

[Calendar Setup](#) | [Help](#) | [Printer Friendly](#)

empl1351 lpme [Menu](#)

< Thursday, June 25, 2020 >

June 2020							July 2020						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6				1	2	3	4	
7	8	9	10	11	12	13	5	6	7	8	9	10	11
14	15	16	17	18	19	20	12	13	14	15	16	17	18
21	22	23	24	25	26	27	19	20	21	22	23	24	25
28	29	30					26	27	28	29	30	31	

Last Month Team Activities [New](#)

Due Date	Priority	Subject
5/30/2020		Asset Product 2 requires follow-up
5/2/2020		Asset Product 4 requires follow-up
5/1/2020		Asset Product 5 requires follow-up

[Show Full List](#)

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.

SI #	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.

SI #	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.

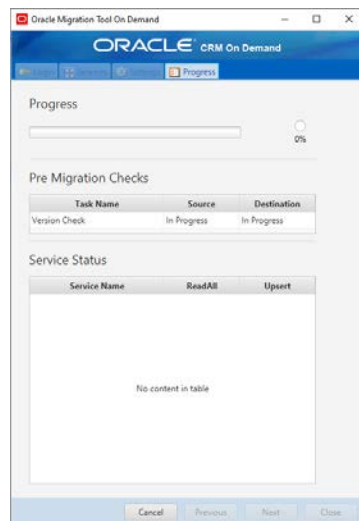
TIPS AND CONSIDERATIONS

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/YYYY
- 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.

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 More... Give Feedback...

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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

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 41

- [Release 41 Administrator Preview Guide](#)
- [Release 41 Product Release Notes](#)
- [Release 41 Entity Relationship Diagram \(ERD\)](#)
- [Release 41 Documentation Library](#)

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 Yes
 No

Document Details
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Last Update: 15-Jun-2020

Related Products

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No References available for this document.

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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

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Integrated Cloud Applications & Platform Services

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