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CRM ON DEMAND

Product Release Notes

Release 41

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Document Versioning

Date	Version	Change Reference
July 17, 2020	20200717	First Draft Published.
August 31, 2020	20200831	Final Version Published.
January 13, 2021	20210113	Added Customer Impact on Analytics related to PODs migration from OCMS to OCI

Overview

The Oracle CRM On Demand Release 41 Product Release Notes outline the known issues, the customer impacts, and the changes to the Oracle CRM On Demand user interface and behavior. The Release Notes also list the defects and behaviors that have been fixed in this release.

To review the features included in this release, see *Oracle CRM On Demand Administrator Preview Guide* for Release 41, as well as the Transfer of Information (TOI) recording.

Known Issues

Analytics

Ability to Show the Account Hierarchy in Analytics in Historical

The Account Hierarchy is exposed in several subject areas in both real-time and historical subject areas. The rest of the subject areas will have the Account Hierarchy exposed, in a later release.

Expose Asset Dimension in Service Request Subject Areas

In Analytics, a user who previously owned an asset record can still see the record after the Owner field has been emptied and if the user does not have the privilege Access All Data in Analytics. This issue will be fixed in a future release.

Usability

Add the Ability to Display Map for Addresses in Concatenated Field

When Inline Edit is disabled in Company Profile, on clicking on the Map icon displayed beside Address fields on the detail pages, the user navigates to the Map tab, however the pin shows the user location instead of the address location, even though the address is valid. As a result, in this Release 41 feature, if a concatenated field has Address fields that correspond to only one address, on clicking on the Map icon displayed in the concatenated field, the user navigates to the Map tab and the pin shows the user location. If a concatenated field has Address fields that correspond to more than one address, on clicking on the Map icon displayed beside the addresses in the concatenated field, the user does not navigate to the Map tab. This pre-existing issue and the effect on concatenated fields with addresses will be fixed in a future release.

When users are inline editing an address block that is part of a concatenated field and select countries like Taiwan, Cabo Verde, Vietnam and Cote d'Ivoire, the address block which was edited disappears from the concatenated field. This pre-existing issue will be fixed in a future release.

Customer Impact

Analytics

Update Country Name Swaziland in Oracle CRM On Demand

Swaziland was changed to Eswatini in Oracle CRM On Demand. Any analyses with filters using the Country columns will no longer retrieve any records because the country name was changed. The users need to rebuild the filters using the new country name.

Expose Asset Dimension in Service Request Subject Areas

Asset visibility has changed from visibility based on account to Owner based visibility in Assets, Asset History and Service Request History subject areas. Asset object does not support teams – therefore, when the visibility setting is set to Team Visibility or Full Visibility, Manager Visibility is applied instead.

Ability to Customize and Audit Lead Event Record

In Release 41, the Lead Event record type was added with the Currency Code field. Due to this change, the existing Lead Event records will have the Currency Code not populated. In the UI, for records where the currency code is not populated, the currency fields will display the user currency code. However, in Analytics, the record currency code is defaulted to company currency code instead of user currency code. Due to this, the analyses will display the currency fields values converted using the exchange rate and this may cause some inconsistency between the values displayed in the UI and the ones displayed in Analytics. Administrators need to correct this inconsistency by updating the currency code on all Lead Event records that have the currency code empty.

Add Consistency between Events and Event History Subject Areas

In Release 41, Number (#) of Accounts for Event metric returns the number of accounts that are associated with events that have invitees, even if it is used without a field from other dimensions. In earlier releases, this metric was named Number (#) of Accounts and if it was used without a field from other dimensions, then it returned the number of all accounts.
Number (#) of Leads for Event metric returns the number of leads that are associated with events that have invitees, even if it is used without a field from other dimensions. In earlier releases, this metric was named Number (#) of Leads and, if it was used without a field from other dimensions, then it returned the number of all leads.
Number (#) of Opportunities for Event metric returns the number of opportunities that are associated with events that have invitees, even if it is used without a field from other dimensions. In earlier releases, this metric was named Number (#) of Opportunities and if it was used without a field from other dimensions, then it returned the number of all opportunities.

Extend Description Fields to Support HTML Formatting

In Analytics, the Description field is truncated when the content of the Description field is longer 2000 characters, so if the Description field stores HTML and the size is bigger than 2000 characters, some closing tags may be cut off and the HTML content will not be displayed correctly. Also, Analytics does not consider the Enable HTML Formatting checkbox from the company profile, the HTML formatting is applied when the column's formatting is set to HTML.

Upgrade OBIEE to 12.2.1.4.0

Starting with Release 41, for Portuguese–Brazil locale the scale factor for 'thousand' is 'K' and for 'million' is 'M'.

Migrate from OMCS Data Center to OCI Data Center

With the PODs migration from Oracle Managed Cloud Services (OMCS) to Oracle Cloud Infrastructure (OCI), the time zone set for the BI servers in OCI is UTC. As a result, the value returned by the CURRENT_TIMESTAMP function after the migration to OCI will be in UTC time zone and may be different than the time zone returned before migration, if the BI servers in OCMS were in a different time zone than UTC. The USER_SERVER_TIMEZONE_OFFSET, SERVER_COMPANY_TIMEZONE_OFFSET session variables will also be impacted by this change. The USER_TIMESTAMP session variable will continue to show the current date and time in the user's time zone.

The users can use the TIMESTAMPADD function in the field formula to convert the timestamp from UTC time to Mountain time. For example, if before the migration the users used to see the timestamp in Mountain time, the field formula is TIMESTAMPADD(SQL_TSI_HOUR, -7, CURRENT_TIMESTAMP). For more information, please refer to the "Calendar Date/Time Functions" topic in the Online Help.

Usability

Ability to Export Activity Samples Dropped Child Records Directly

In Release 41, the performance on 'Samples Dropped' partial export is improved by extracting the 'Samples Dropped' records directly, bypassing the query on the 'Activity' parent records. As a result of this change, the export file name has changed from 'Activity Samp Drop_<RowId>.csv' to 'Call SampDrop_<RowId>.csv. In addition, the Record Type name displayed in Export Request Queue and Export Request Detail pages has changed from 'Activity: Samples Dropped' to 'Samples Dropped'.

Fields Not Present in Layout Are Read Only During Merge

Prior to Release 41, it was possible for users without access to a field on their layout to select the value to keep in the primary record for the field via the merge wizard. Users without access to fields on their layouts should not be able to select or edit value for the field, even via merge. In Release 41, a new "Merge All Editable Fields" privilege is introduced. With this privilege enabled, it is possible to select the values to save on merge for all editable fields, including fields that are not displayed in the page layout.

Update Country Name Swaziland in Oracle CRM On Demand

Swaziland was changed to Eswatini in Oracle CRM On Demand. Language independent code is unchanged. Any expression which contains hard-coded the old country name including translations will need to be updated with the new country name. Users also need to update the country name in the import csv file if the country display name need to be used. Users are encouraged to use language independent code for country field in expressions and import data files.

Update Time Zones & DST Mappings

In Release 41, time zones and DST mappings in Oracle CRM On Demand have been updated with the tzdatabase 2019b. The users need to update time zone data in import csv accordingly if the time zone names are listed in the following table.

The following time zone have been renamed:

Previous Name	Release 41 Name
(GMT) Casablanca	(GMT+01:00) Casablanca
(GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London	(GMT+00:00) Dublin, Edinburgh, Lisbon, London
(GMT) Monrovia	(GMT+00:00) Monrovia, Reykjavik
(GMT+03:00) Moscow, St. Petersburg, Volgograd	(GMT+03:00) Moscow, St. Petersburg

Workflows

Notification Emails when Integration Events Threshold Reached

Prior to release 41, if a notification email address is configured on the integration event queue and the number of queue transactions reaches the configured number, then an email is sent for every integration event that is added to the queue thereafter, until the queue reaches the maximum number of integration events or if the queue is cleared and below the configured number. This generates a lot of emails. In release 41, a warning email is sent only when the number of integration events in the queue reaches the configured threshold. No additional emails will be sent after until the queue reaches the maximum number of integration events then a final email will be sent.

Language Support

The following table outlines the supported languages for Oracle CRM On Demand and its related applications:

	Chinese Simplified	Chinese Traditional	Danish	Dutch	English-American	English-British	Finnish	French	German	Italian	Japanese	Korean	Norwegian	Polish	Portuguese	Portuguese – Brazilian	Russian	Spanish	Swedish	Thai	Turkish
Oracle CRM On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oracle CRM On Demand Desktop	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oracle Contact On Demand					✓																
Oracle Email Marketing On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	
Oracle CRM On Demand Connected Mobile Sales for iPhone and Android*	✓		✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		✓	
Oracle CRM On Demand Connected Mobile Sales for BlackBerry					✓			✓	✓										✓		
Oracle Offline On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓		✓	✓	✓	✓	
Oracle Notes Email Integration On Demand					✓																
Oracle Outlook Email Integration On Demand					✓																

* For information on supported languages for Oracle CRM On Demand Connected Mobile Sales, refer to *Oracle CRM On Demand Connected Mobile Sales Product Release Notes*.

Fixed Issues

The following defects have been fixed in Oracle CRM On Demand Release 41.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
12560583	Administration	On Alert Edit page, system generated forecast alert title field is not translated properly to Japanese.
12379130	Administration	On Personal Detail page, currency symbol $ is displayed in Fund Approval Limit field when Currency field is not set to USD.
31393787	Analytics	A report on Asset History subject area does not return any results, while a similar report on Assets subject area returns the correct results.
31115460	Analytics	A report on Vehicles subject area times out.
29826576	Analytics	If the book selector setting in Analytics is different than the user's default book setting, after few minutes, when refreshing the results, the analysis does not retrieve the data according to the book selector setting. Instead the analysis displays the results using the user's default book setting.
29842277	Analytics	In some real-time subject areas, the average metrics for currency, integer and number custom fields are incorrect, because in the average calculation the records for which the custom fields are not populated are excluded and the number of records is incorrect, therefore the average is incorrect.
31301700	Analytics	The calculation for Parent Opportunity Revenue in real-time subject areas is incorrect.
30427010	Analytics	The embedded analyses and dashboards that have leading or trailing spaces in their names fail to display because the Analytics picker at the configuration time removes the extra spaces from the analyses and dashboards original names and the Analytics objects cannot be found in the Catalog by their modified name. The issue has the same impact on Analytics objects that have leading or trailing spaces in their names and are scheduled via workflow scheduler with Analytics content. Note that in Catalog, the users could not save analyses and dashboards with leading or trailing spaces, but they were able to rename them to names with leading and trailing spaces.
31347567	Analytics	The Expiration Date column from Asset folder in both real-time and historical Asset related subject areas has a timestamp while in UI, the field does not have a timestamp.
31019533	Analytics	The Number (#) of Opportunities metric from Event Metrics folder in Event History subject area returns 0 when it is combined with columns from Lead folder instead of returning the number of opportunities linked to an event which has invitees.
30531558	Analytics	The time portion of the Modified field from Owner related folders in all real-time subject areas show the time in UTC (Coordinated Universal Time).
31516555	BPM	<PRE> HTML tag is not working in Send Email Workflow Action.
28537894	BPM	Error occurs for creating integration events with trigger event = When new record saved and record type = Invitee.
30872165	CRM	Account Partner with the same start date can be created causing duplicate records.
30990598	CRM	Users are not able to remove Campaign Recipient records from Campaign Detail page; they get error message 'No Id value specified in the Adapter Service Request
31337531	Customization	Default filter criteria is not filtering value as per the setup.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
31312114	Data Management	An access denied error occurs during mass update when the user's default book is deleted.
25616602	Data Management	Mass update for a field fails with Access Denied Error even though user has access to update the field.
31446519	Data Management	Unable to remove users with language set to French with the Batch Assign Team Member feature.
31505680	Data Management	Unable to select the value for merge for fields not part of page layout. See "Fields Not Present in Layout Are Read Only During Merge" customer impact section.
30622689	Globalization	Brazil has decided not to change to daylight savings late 2019, CRM OnDemand time zone is not up to date.
31219084	Globalization	Currently, CRMOD time zones with offset 0 are using prefix (GMT) which is not consistent the name convention (GMT+<offset>, also they are different from Windows time zone offset format (UTC+00:00).
31242588	Integration	Error encountered when copying or editing the action bar and global header layouts.
21823151	Integration	When a Boolean field is tracked in an integration event, the format is not following W3C formats.
21823492	Integration	When a Date field is tracked in an integration event, the format is not following W3C formats.
31233136	Layout	In the Page Layout Wizard - Step 4 for Related Information, Related Object names which are listed in Not Available Information and Available Information boxes are not in alphabetic order, which is not easy for users to find and select.
31133370	Layout	Stop Light or Star Rating values are not preserved when users switch from one Dynamic layout to another
31497125	PSR	Enterprise Manager reports URL down due to login deadlock, but this occurs very rarely.
31180937	PSR	On Master Audit Trail page, users may get time out error when they click Next to fetch records for next page.
10614006	UI/Usability	Deleted lists which are marked as favorite are still displayed in favorite list.
30703912	UI/Usability	Finnish, Danish, Polish, Dutch languages users see different field setting on Advanced Search and List Refine pages from English version
30667174	UI/Usability	For Spanish, German, Polish language users, the error messages will show if users are searching Leads from the action bar without filling in any searching value
12695545	UI/Usability	In the Related Information section of Account Detail page, Service Request Subject field is not displayed as a link, users can not click to drill into Service Request Detail Page.
30910549	UI/Usability	Partial Export for Samples Dropped object has bad performance.
19764620	UI/Usability	The favorite button in the embedded detail form overrides the one for the main detail form. Users get errors when they mark favorite records from within a custom web tab or web applet.

Documentation

The following documentation errors or omissions exist in Release 41 and will be corrected in a subsequent update.

Online Help

Topic: Managing Currencies

The following note is missing from this topic:

NOTE: If the currency code on a record is blank, then Analytics assumes that the values in the currency fields on the record are in the company's default currency. In any analysis that includes the record, the values that are returned in the currency fields are the corresponding values in the currency for the analysis, calculated using the appropriate exchange rate. The currency for an analysis is the currency that is selected on the user profile of the user who is viewing the analysis. If no currency is selected on the user's profile, then the default currency for the company is used. However, if a currency prompt is set up on the analysis, then the user can select a different currency.

Topic: Reviewing Your Alerts

The final paragraph in this topic reads as follows:

The expanded or collapsed state of the scrolling text bar persists when you navigate away from the current page. However, each time you sign in to Oracle CRM On Demand, the scrolling text bar is expanded if there is content to be displayed there for you.

The text should instead read as follows:

If the scrolling text bar is expanded, then the expanded state persists when you navigate away from the current page or refresh the current page. If the scrolling text bar is collapsed, then when you navigate away from the current page or refresh the current page, the scrolling text bar is automatically expanded if either of the following is true:
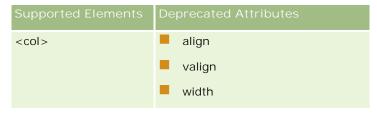
- There is a new alert to be displayed for you in the scrolling text bar.
- An alert that you have not dismissed and that is configured to be displayed in the scrolling text bar for you has been updated.

Otherwise, the collapsed state persists.

Each time you sign in to Oracle CRM On Demand, the scrolling text bar is expanded if there is content to be displayed there for you.

Topic: HTML Code for Note Fields and Workflow Email Messages

Some of the attributes that are listed in the Supported Elements and Attributes section of this topic have been deprecated and are no longer supported. The attributes that have been deprecated are listed in the following table.

Supported Elements	Deprecated Attributes
<col>	■ align ■ valign ■ width

Supported Elements	Deprecated Attributes
<colgroup>	■ align ■ valign ■ width
<div>	■ align
<hr>	■ align ■ size ■ width
<img>	■ align ■ hspace ■ vspace
<p>	■ align
<table>	■ align ■ bgcolor ■ border ■ cellpadding ■ cellspacing ■ height ■ width
<td>	■ abbr ■ align ■ bgcolor ■ height ■ width
<th>	■ align ■ bgcolor ■ height ■ width

Supported Elements	Deprecated Attributes
<tr>	◼ align ◼ height ◼ valign ◼ width

In addition, note the following points:

- For the <a> element, using any value other than nofollow with the rel attribute might cause cross-site scripting security issues.
- If any of the deprecated attributes are used with the <img> element in an existing workflow email message or note description, then cross-site scripting security issues could arise.
- The headers attribute is supported for the <td> and <th> elements.
- The scope attribute is supported for the <th> element.

The attributes listed in the table above are not automatically deleted from any existing workflow email message or note description, unless the workflow action or note description is edited. However, the attributes might not work at all, or might not work as expected.

If you edit a workflow send email action that contains an unsupported attribute in the email message, then the attribute will be deleted when you save the updated workflow action.

If a note description contains an unsupported attribute, and if the Enable HTML Formatting check box on the company profile is selected, then the attribute will be deleted the next time the note description is updated and the note is saved.

If you attempt to include an unsupported attribute in the email message when you create a new workflow send email action, then the attribute will be deleted when you save the workflow action.

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