Oracle CRM On Demand

Administrator Preview Guide
Release 42

April 2021

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Document Versioning

Date	Version	Change Reference
April 20, 2021	20210420	Document published

1 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 Sort on Layout List Pages		✔		
Disable Sending the Email if the Scheduled Analysis Does not Return Data		✔		
Enforce Product and Product Category Relationship in Product Revenue		✔		
Analytics				
Ability to Create Browser Script Action Links in Custom Objects 01 to 40				✔
Ability to Show the Account Hierarchy in Analytics in All Subject Areas				✔
Ability to Show the Account Hierarchy in Analytics using Hierarchy Columns				✔
Add Missing UTC Fields in All Subject Areas				✔
Enhance Assets with Book Support				✔
Expose Account Event Custom Fields in Analytics				✔
Expose Household and Objective Code and User Language Picklist Fields in Analytics				✔

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Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
Expose Missing Short Text Fields 75 to 99 in Opportunity Historical Subject Areas				✓
Expose Opportunity Event Custom Fields in Analytics				✓
Expose Owner in Activity folder in Analytics				✓
Application Customization				
Ability to Customize and Audit Account Event Record		✓		
Ability to Customize and Audit Opportunity Event Record		✓		
Add Extra Sections from 6 to 10 in Object Detail Page		✓		
Add Related Information New Record Layout		✓		
Move 'Navigate directly to detail page if only one record is returned' Option Field to Profile Pages		✓	✓	✓
Usability				
Ability to Add Multiple Related Information Records at a Time		✓		
Ability to Export Attachments on Event and Fund Record Types		✓		
Ability to Show the Pins from the Last Proximity Search on Clicking Back to Maps				✓
Add Show Full List link under Recently Viewed Section in Action Bar				✓
Concatenated Fields: Hide Commas and Dashes when Blank Field Follows		✓		✓
Enable Description Field for Object List Views and Related Information Layouts				✓
Enable Merge for All Record Types				✓
Enable Type-ahead Search for Targeted Search				✓

Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
Enhance Assets with Book Support				✔
New Alert Information Page Layout for Users without Manage Company Privilege				✔
Web Services				
Administrative Web Services to Manage Lead Conversion Mapping				✔
Administrative Web Services to Manage Sales Process Configuration				✔
Administrative Web Services to Manage Sales Stage Configuration				✔

2 Administration

Ability to Sort on Layout List Pages

Prior to Release 42, the Homepage Layout, [Record Type] Page Layout, [Record Type] Search Layout, Dynamic Page Layout list views, etc., are not displayed and sorted in a standard way.

In Release 42, all types of layout list views are standardized with columns Name, Description, Modified By, Modified Date and default sort on Name field in alphabetical order. The System Generated layout is always at the top of the list, and users can sort layouts on Name, Description, Modified By and Modified Date, in both ascending and descending order.

The illustration below shows the default view of the Opportunity Page Layout list.

In the illustration below, the list is sorted on the Modified By column.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

Changes in the default sorting will not be saved.

Disable Sending the Email if the Scheduled Analysis Does not Return Data

With Release 42, workflow administrators can specify that no email is to be sent to the users if the scheduled analysis selected on a Send Email action returns no results for that user. By default, the Send Email if No Results check box is selected on the Send Email action, and the email is sent to all of the users selected on the workflow rule, even if the analysis returns no results for a user. If the workflow administrator deselects the check box, then the email will be sent only to those users for whom the analysis returns results. This option is available for scheduled analyses only and is not available for dashboards or dashboard pages. If no email is sent to a user because the analysis returned no results for that user, then the workflow action is considered to have failed for that user, and the failure is reported in the workflow error monitor.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

If workflow administrators want the email to be sent to some users even if the scheduled analysis returns no results for those users, but they do not want the email to be sent to other users if the scheduled analysis returns no results for them, then administrators can create two separate scheduled events with Send Email actions to execute the same analysis, but with different sets of users. On the scheduled event with the users to whom the email does not need to be sent if the analysis returns no results, workflow administrators can deselect the Send Email if No Results check box.

Enforce Product and Product Category Relationship in Product Revenue

Prior to Release 42, when the administrator makes the Product Category field editable in the Opportunity Product Revenue detail page, users can save Opportunity Product Revenue records with mismatching Product and Product Category. Users are not prompted about these mismatches when updating the Product details page or the Opportunity Product Revenue details page and the records are saved with no errors displayed.

In Release 42, a new check box field 'Enforce Product Category-Product relationship in Opportunity Product Revenue' is added to the Company Settings section in the company profile page. By default, the enforcement check box is not selected. Administrators can select the check box to enforce the requirement for the Product Category and Product fields to match each other in the Opportunity Product Revenue page. Then, users will see a popup error message for mismatches.

The following illustrations show the new picklist field on the company profile page and the popup error message that the user sees when the enforcement is in place and a mismatch occurs.

crmodeat-pod1.us.oracle.com says

Product chosen is not associated to the selected Product
Category. Please choose the Product appropriately and try again.

OK

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

1. When the company administrators make the Product Category field editable when setting up a field, consider selecting the 'Enforce Product Category-Product Relationship in Opportunity Product Revenue' on the Company Profile page so that Product Category and Product will match each other.
2. When the company administrators enable the enforcement, users cannot save Opportunity Product Revenue records if the selected Product Category and Product values are not associated.

3   Analytics

Ability to Create Browser Script Action Links in Custom Objects 01 to 40

Before Release 42, administrators could create action links that invoke a Browser Script for the following standard objects: Opportunity, Account, Contact, User, Service, Lead, Campaign, Partner, Solutions, Revenue, Appointment, Task. With Release 42, administrators can define action links that invoke Browser Script also for Custom Objects 01 to 40.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Ability to Show the Account Hierarchy in Analytics in All Subject Areas

In Oracle CRM On Demand, users can create account hierarchies, for example when an account is a subsidiary of another account, by specifying a parent-child relationship. In Release 41, only some Analytics subject areas had the Account Hierarchy exposed under the Account dimension. In Release 42, the Account Hierarchy is exposed in all historical and reporting subject areas which have Account dimension.
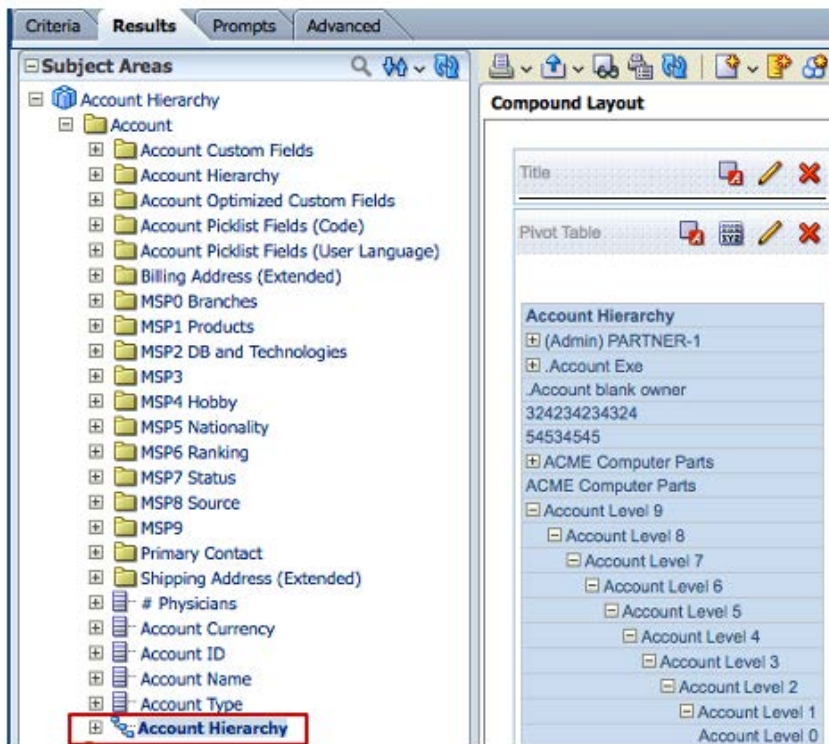
STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Ability to Show the Account Hierarchy in Analytics Using Hierarchy Columns

Starting with Release 42, users are able to analyze account data and display the account hierarchy using the Account Hierarchy column in the new Account Hierarchy subject area.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Add Missing UTC Fields in All Subject Areas

In Release 42, all the missing UTC fields corresponding to the Date fields were added to all the real-time reporting subject areas so the query-time is reduced when these UTC fields are used in filters.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Enhance Assets with Book Support

In Release 42, the Book folder is exposed in Assets, Service Requests, Asset History, and Service Requests History subject areas where Asset is exposed as a dimension.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Expose Account Event Custom Fields in Analytics

The Account Event custom fields are enabled in Release 42 and are also exposed in Analytics in the following subject areas:

- Event History
- Events

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Expose Household, Objective Code and User Language Picklist Fields in Analytics

In Release 42, the Household Picklist Fields (Code), Household Picklist Fields (User Language), Objective Picklist Fields (Code), and Objective Picklist Fields (User Language) fields are exposed in the Opportunity dimension of the Opportunity related subject areas.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Expose Missing Short Text Fields 75 to 99 in Opportunity Historical Subject Areas

In Release 42, the Short Text fields 75 to 99 are exposed in the Opportunity and Opportunity Competitor History and Opportunity and Opportunity Partner History subject areas.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Expose Opportunity Event Custom Fields in Analytics

The Opportunity Event custom fields are enabled in Release 42 and are also exposed in Analytics in the following subject areas:

- Event History
- Events

STEPS TO ENABLE
There are no steps to enable this feature.

TIPS AND CONSIDERATIONS
None

Expose Owner in Activity folder in Analytics

In Release 42, the Activity field is exposed in the Activity dimension of the Activity related subject areas.

STEPS TO ENABLE
There are no steps to enable this feature.

TIPS AND CONSIDERATIONS
None

4 Application Customization

Ability to Customize and Audit Account Event Record

With Release 42, administrators can add custom fields and cascading picklist fields for the Account Event record type. In addition, administrators can enable Audit Trail as a Related Information section for the Account Event record and review the changes made on the auditable fields.

STEPS TO ENABLE
Using the Admin > Application Customization > Event page, administrators can:
- Use Account Event Field Setup to create new custom fields for Account Event record type
- Use Account Event Cascading Picklists to create cascading picklists for Account Event
- Use Account Event Field Audit Setup to select the auditable custom fields
- Use Account Event Page Layout to select which fields will be displayed on the Account Event page when adding or updating Account Event records
- Use Account 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

TIPS AND CONSIDERATIONS

None

Ability to Customize and Audit Opportunity Event Record

With Release 42, administrators can add custom fields and cascading picklist fields for the Opportunity Event record type. In addition, administrators can enable Audit Trail as a Related Information section for the Opportunity Event record and review the changes made on the auditable fields.

STEPS TO ENABLE

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

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

TIPS AND CONSIDERATIONS

None

Add Extra Sections (from 6 to 10) in Object Detail Page

In Release 42, the number of sections for record detail page has been extended from 6 to 10.

In the illustration below, the extra 4 Available Sections in red box are available in Release 42.

STEPS TO ENABLE

In any record type Page Layout wizard, at step 3 for Field Layout, move fields to the extra sections

TIPS AND CONSIDERATIONS

Users must have the Customize Application privilege.

Add Related Information New Record Layout

Prior to Release 42, administrators don't have the ability to specify the new record layouts for creating related information records. When users create new Related Information records from a parent record detail page, the new record page layouts for the record types at top level that are assigned to the users' roles are used.

In Release 42, the record Page Layout Wizard has been enhanced with the option for selecting the New Related Information Record Layout in Step 5. Company administrators can select an available new record layout of that record type to be used for creating new related information records under the selected parent record detail page.

In the illustration below, the administrator selects 'New Custom Object 01 for Opportunity' as the new record layout for Custom Object 01 at the step 5 in the Opportunity Page Layout Wizard. With this Opportunity Page Layout assigned to their role, users see the 'New Custom Object 01 for Opportunity' page layout when creating a new Custom Object 01 record from the Opportunity Detail page.
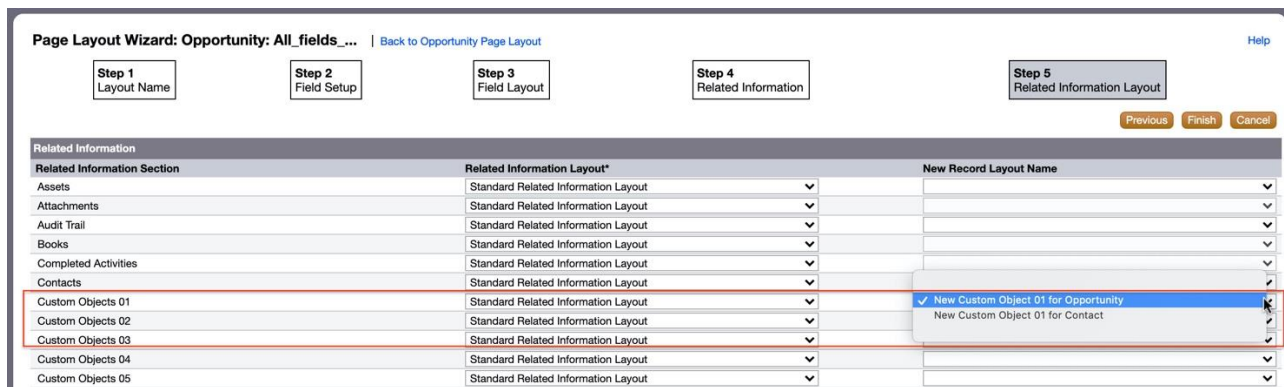
STEPS TO ENABLE

To allow a user to use specific page layouts to create related information records from parent record detail pages, administrators need to select the new record page layouts for related information records at step 5 in the parent record Page Layout Wizard, and then assign the page layout to the user's role.

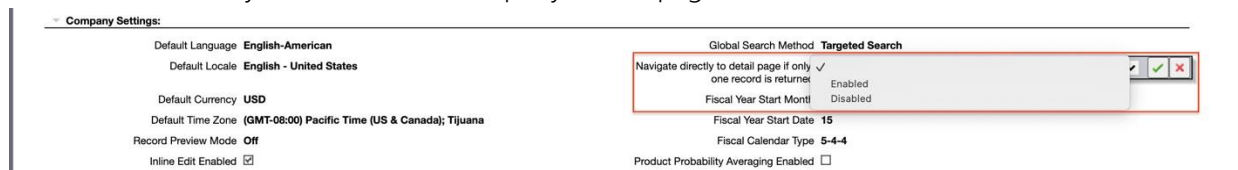## TIPS AND CONSIDERATIONS

None

Move 'Navigate directly to detail page if only one record is returned' Option Field to Profile Pages

Prior to Release 42, the "Navigate directly to detail page if only one record is returned" option is under My Setup > Personal Layout > Action Bar Layout. This is a useful feature but typically not used because the opt-in is difficult to find.

In Release 42, this option is moved to the Personal Profile and Company Profile pages as a picklist field of the same name 'Navigate directly to detail page if only one record is returned'. There are three options in this picklist: Enabled, Disabled and blank. By default, this picklist field is blank on both the Personal Detail page and the Company Profile page.

Administrators can set this up for all users in the company, or users can set it up at the user level. The user-level setting overrides the company-level setting. If the user's setting is null, then the company level setting will be used. After the upgrade to Release 42, the picklist field on the Company Profile page will be blank. All existing users who have this option selected in the Action Bar Layout page before Release 42 will have the picklist field 'Navigate directly to detail page if only one record is returned' field set to Enabled after the upgrade to Release 42.

In the following illustration for Release 42, the picklist field 'Navigate directly to detail page if only one record is returned' is blank by default on the Company Profile page.

The comparison between the user-level option in the Action Bar Layout for Release 41 and the equivalent setting on the user's profile page after the upgrade to Release 42 is illustrated below.
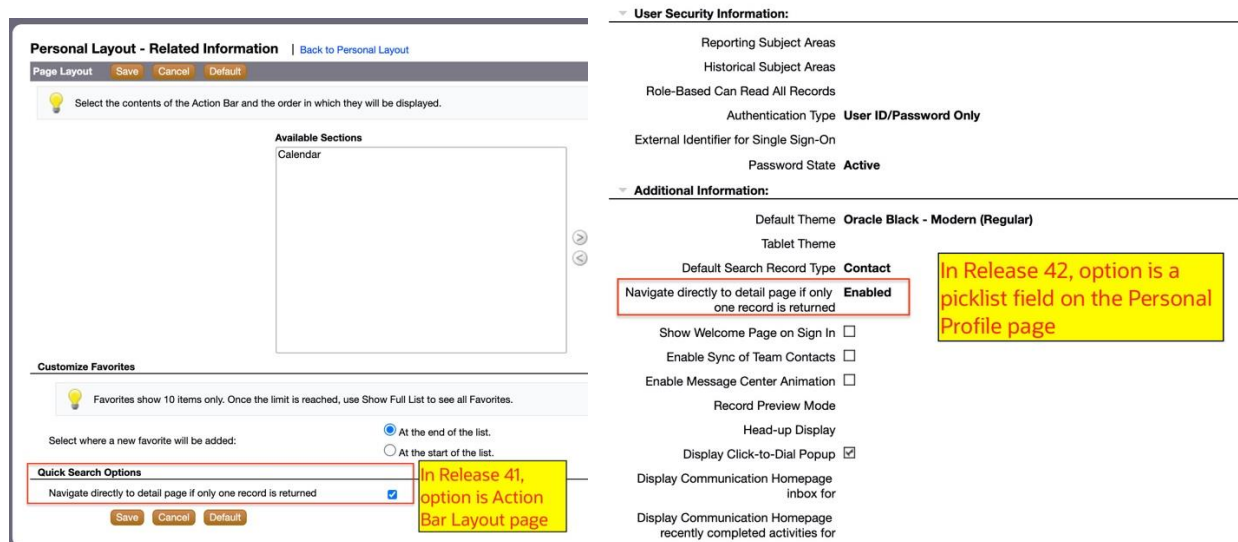
STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

1. The picklist field 'Navigate directly to detail page if only one record is returned' is always displayed in the Company Profile page.
2. In the system default User Page layouts, the picklist field 'Navigate directly to detail page if only one record is returned' is displayed under the 'Default Search Record Type' field in the lower-left section of the page.
3. Administrators need to update the pre-existing custom user page layouts to expose the 'Navigate directly to detail page if only one record is returned' picklist field to allow users to change their own settings.

5 Usability

Ability to Add Multiple Related Information Records at a Time

Prior to Release 42, users can add multiple recipients to Campaigns at the same time. However, for some Related Information record types under Custom Objects 01 - 03 and other record types, users can add only one record at a time, for example, users have to add Contact records to Custom Object 01 one by one.

In Release 42, for many related information types, company administrators can select the 'Enable List Add' option in the Related Information Page Layout wizard to enable the List Add button, which allows users to add or remove multiple related information records at the same time.

In the following example, the administrator has selected 'Enable List Add' on the Related Information for Contacts under Custom Object 01. The List Add button is displayed on the Custom Object 01 detail page, and users can add or remove multiple Contacts by clicking the List Add button and selecting contact records in the lookup window.

Custom Object 01 Related Information Layout for Contacts:

The List Add button is available for the Contacts applet on the Custom Object 01 detail page:

By clicking the List Add button, users can add or remove multiple Contacts from the lookup window:

STEPS TO ENABLE

Administrators can enable the List Add feature in the Related Information Page Layout wizard if the 'Enable List Add' option is available.

TIPS AND CONSIDERATIONS

Not all Related Information sections support the List Add feature. Please check the Online Help for details.

Ability to Export Attachments on Event and Fund Record Types

In Release 42, users can now export the attachments for the Event and Fund record types.

In the following illustration, Event and Fund are displayed in the All Attachment Data section of the Data Export Assistant page after the administrator grants the proper access level to Attachments for the Fund and Event record types.
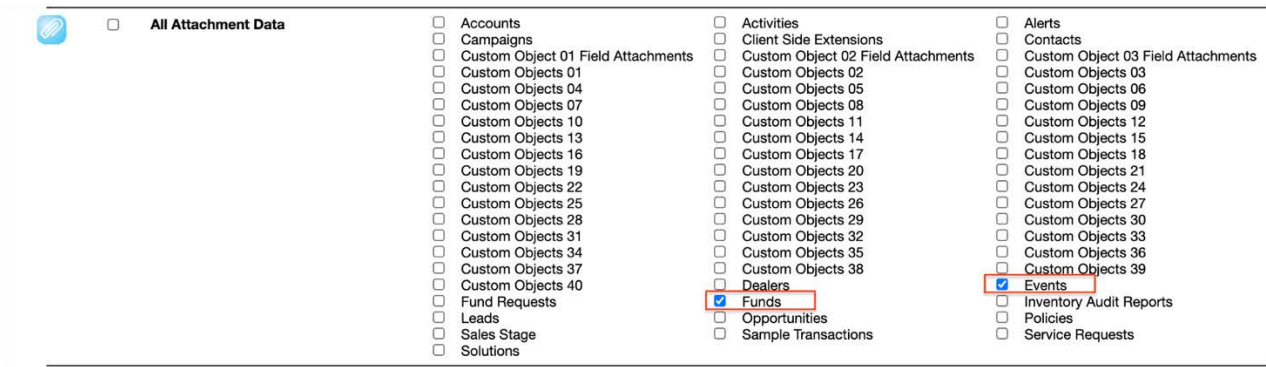
STEPS TO ENABLE

By default, Event and Fund are not displayed in the All Attachment Data section of the Data Export Assistant page for privileged users to select. Administrators need to grant proper access level to Attachments of Fund and Event for selected Access Profiles by following the following steps:

1.   Go to Admin > Access Profiles.

2.   Click the Edit link beside the selected Access Profile Name.

3.   At Step 2, click the Related Information link beside Event or Fund.

4.   Select an Access Level for Attachments; by default the Access Level is No Access.

TIPS AND CONSIDERATIONS

None

Ability to Show the Pins from the Last Proximity Search on Clicking Back to Maps

Using proximity searches, users can find accounts, contacts and activities on the map. In Release 41, Oracle CRM On Demand enabled the ability to preview the Account, Contact and Activity records and with this feature users can navigate to the Account, Contact, and Activity detail pages. Users can then navigate back to the Map tab using the Back to Maps link. In Release 41, the result of the proximity search is lost, and users need to start a new proximity search if they need to inspect other accounts, contacts or activities on the map. With Release 42, the result of the proximity search is remembered, and users can inspect other records on the map without having to perform the proximity search again.

STEPS TO ENABLE

There are no steps to enable this feature.
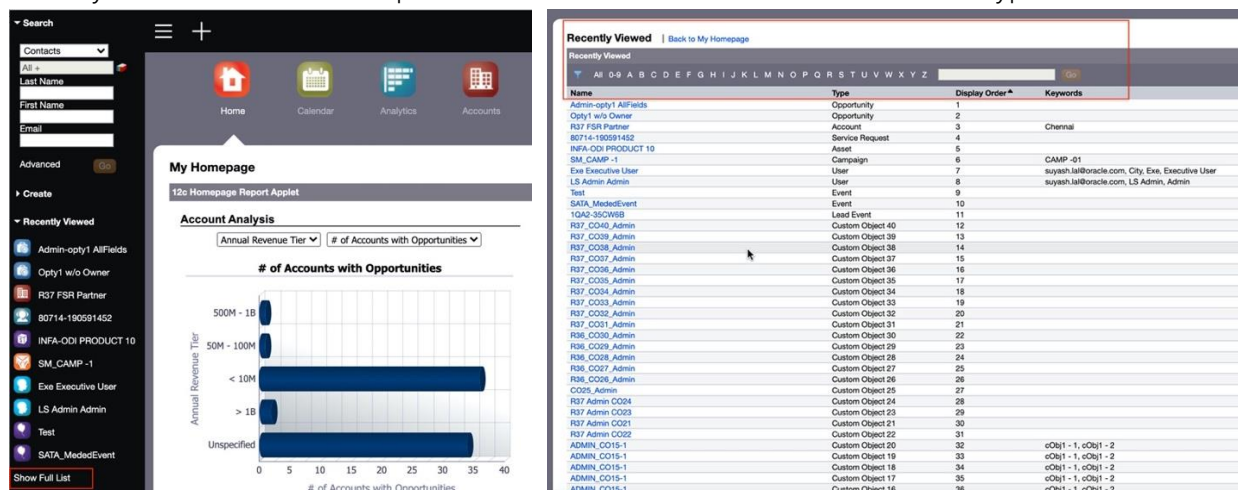
TIPS AND CONSIDERATIONS

None

Add Show Full List Link under Recently Viewed Section in Action Bar

Prior to Release 42, the Show Full List link is not available in the Recently Viewed section in the Action Bar. There are only 10 records displayed in the Recently Viewed section, whereas CRM On Demand stores up to 10 recently viewed records of each record type in the history.

In Release 42, the Show Full List link is available in the Recently Viewed section in the Action Bar. Users can click the Show Full List link to browse, sort and search through the full list of recently viewed records.

In the illustrations below, the Show Full List link is available in the Recently Viewed section in the action bar. By clicking the Show Full List link, the user is directed to the full list view of recently viewed records with the most recently viewed record in the top and a maximum of 10 records for each record type.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

On the Recently Viewed full list page, users can drill in to record detail pages. Users can sort and filter the list on Name, Type, Display Order, Keywords. Some record types have Keywords defined.

Concatenated Fields: Hide Commas and Dashes when a Blank Field Follows

In CRM On Demand, a concatenated field can be built using User fields and/or <Object> fields. In addition, users can add hardcoded text in the concatenated field formula. Because the User fields and/or <Object> fields can be NULL, when a user builds a concatenated field using a formula like "<Field1> <Field2>, <Field3>" and <Field3 Value> is NULL, the concatenated field is evaluated to "<Field1 Value> <Field2 Value>," leaving the comma at the end. Users want to have the ability to remove the extra comma which is not necessary in this case. This is achieved in Release 42, by enabling the ability to add functions around the fields that are part of the concatenated field.

Here is an example for an Account concatenated field which is built up with Account Name, Region and hardcoded text, the administrator defines the formula so that users will see 'The account name is <Name> and is from the region <Region>.' as the content in the concatenated field.

Illustrated below is the concatenated field Edit Field window in Release 41, there is no function to check if Region is null.
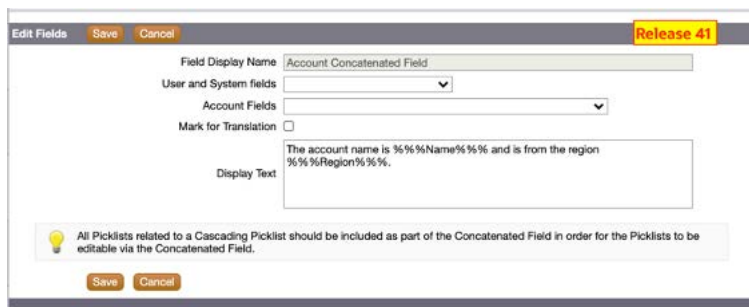
Whereas we can see from the following illustrations from Release 42, the function icon is enabled, so the administrator can click to launch the Expression Builder window and add functions and logic for NULL region.
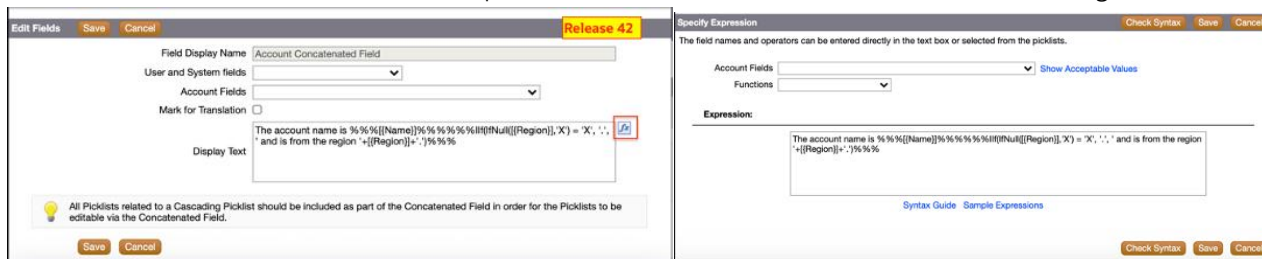
Based on the formulas defined above, users see an unfinished sentence in the concatenated field in Release 41, whereas in Release 42, the content of the concatenated field does not show region when the region field is NULL.
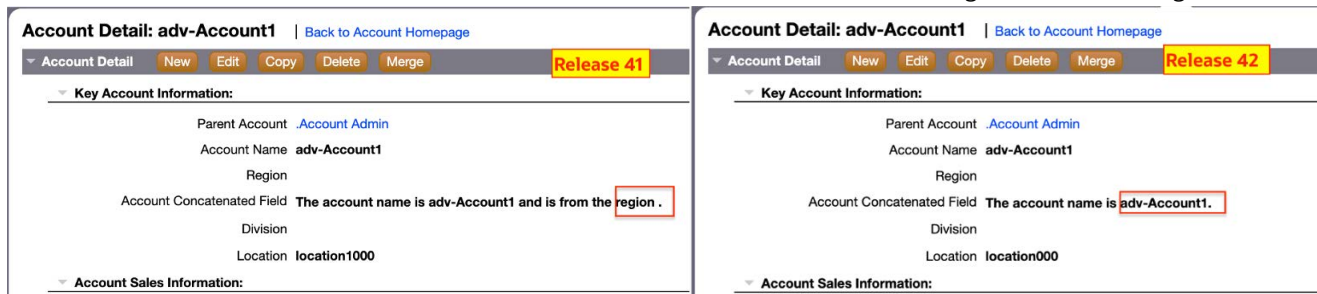
STEPS TO ENABLE

1. Go to Field Setup, click Edit Fields beside the concatenated Field.
2. Click the fx icon to open the Expression Builder window.
3. From the Functions dropdown list, select functions and build the formula as needed, for example the formula 'The account name is %%%[{Name}]%%%%%%IIf(IfNull([{Region}],'X') = 'X', '.', ' and is from the region '+[{Region}]+'.')%%%' will evaluate the value for the Region field and if it is null, then finish the sentence by adding a '.', otherwise if not null add the region value.
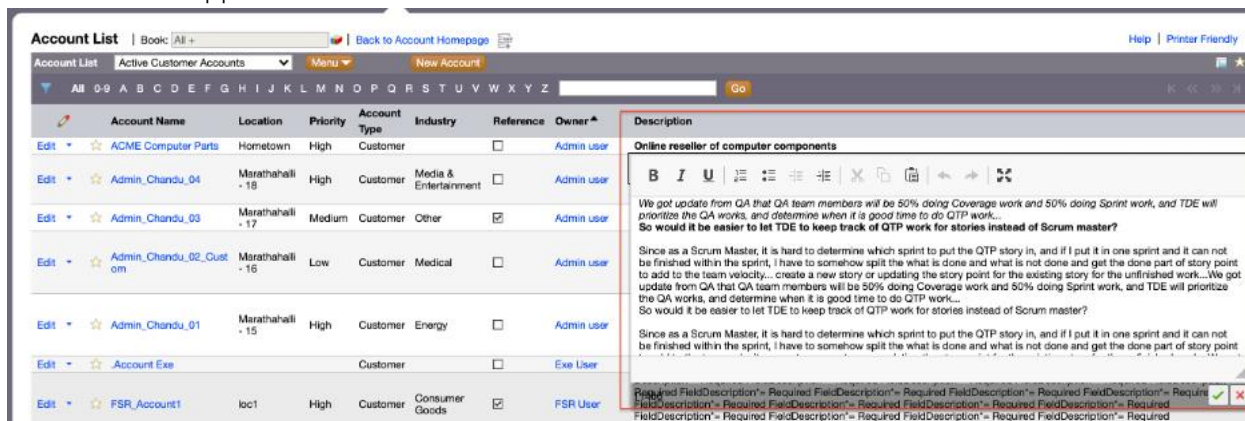
TIPS AND CONSIDERATIONS

None

Enable Description Field for Object List Views and Related Information Layouts

Prior to Release 42, Note type fields, for example the Description field, are not included in the Available Fields list for the object lists and the Related Information Layouts.

In Release 42, Note type fields can be selected to be displayed in the object list views and the related information list views. Searching, tooltips, and sorting on Note type fields are not supported, whereas inline editing is supported. HTML format and CKEditor are also supported, if the Enable HTML is set at the Company Profile page. Long content will be truncated to 500 characters to be displayed in the list views. Users can drill down to record detail pages or use inline editing to read and modify the full content.

The following example illustrates the Description field in the Account list, the user can inline edit the field with HTML format supported.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

If the content length is over 500 characters, the content will be truncated in the list view. Instead of displaying the truncated content in HTML format, HTML tags will be displayed.

Enable Merge for All Record Types

Prior to Release 42, merging up to five records is supported for eight record types only: Account, Contact, Division, Household, Lead, Partner, Portfolio, and Service Request.

In Release 42, the ability to merge up to five records has been extended to all supported top level record types. Users can choose up to four duplicate records to merge into the primary record. The existing rules will be followed for merging multiple records to the primary record. The duplicate records will be deleted after the merge. Users can choose from the values from any of the selected records to maintain in the primary record in the second step.

The following illustrations show how the user selects the primary opportunity then clicks the Merge button to start the merge steps.

STEPS TO ENABLE

There are no steps to enable this feature.
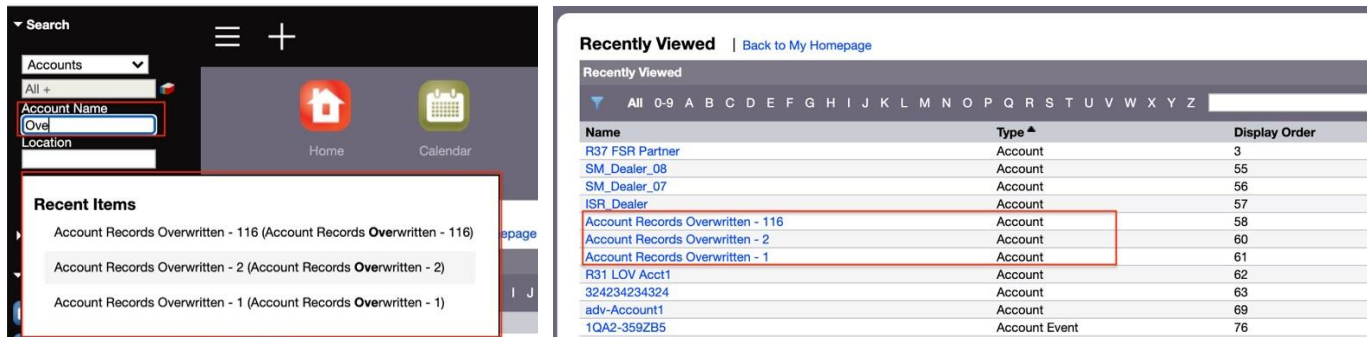
TIPS AND CONSIDERATIONS

None

Enable Type-ahead Search for Targeted Search

Prior to Release 42, the type-ahead search is only available in Enhanced Search.

In Release 42, the type-ahead search is enabled for Targeted Search. In the Targeted Search applet, when a user types search strings in the key fields, a small Recent Items window is opened under the search field. This window lists all records of the searching record type in the recent item lists that match the search string characters entered, up to a maximum of 10 records.

The following illustration is an example of Targeted Search for Account. The user types the string 'Ove' into the Account Name field, the Recent Item window opens with all matching Account records with Account Name containing 'Ove' from the Recently Viewed accounts' list.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Enhance Assets with Book Support

In Release 42, the Book field is available and can be enabled for the Asset record, so the asset records can now be assigned to books. The Asset record ownership now supports User mode, Book mode, and Mixed mode.

STEPS TO ENABLE

There are no steps to enable this feature.
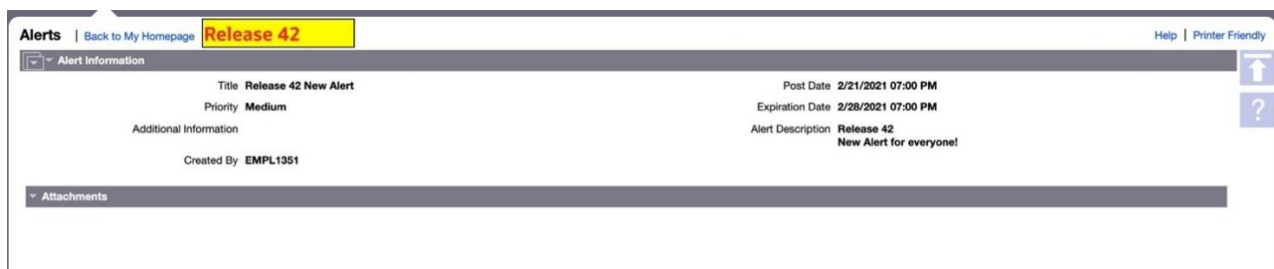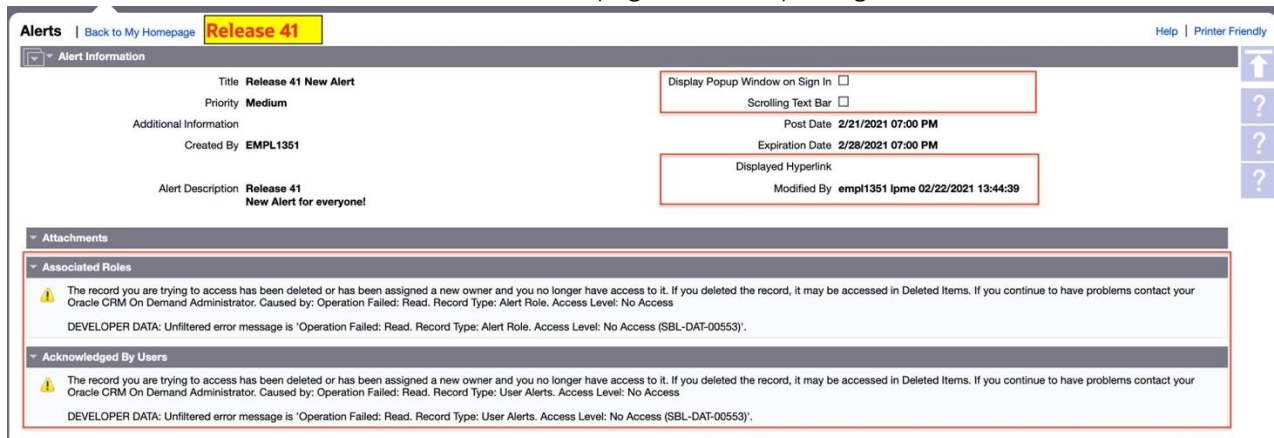
TIPS AND CONSIDERATIONS

None

New Alert Information Page Layout for Users without Manage Company Privilege

Prior to Release 42, users without the Manage Company privilege see all fields and applets when drilling into the Alert Information page. Some fields apply only to privileged users. Users who do not have the privilege see No Access messages under the Associated Roles and Acknowledged By Users applets.

In Release 42, users without the Manage Company privilege will not see these fields: Display Popup Window on Sign In, Scrolling Text Bar, Displayed Hyperlink, and Modified By. The Associated Roles and Acknowledged By Users applets are also hidden for the non-privileged users.

The illustrations below are the Alert Information pages for non-privileged users in Release 41 and Release 42.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

6 Web Services

Administrative Web Services to Manage Lead Conversion Mapping

In Release 42, a new Lead Conversion Mapping Administrative Web Service is introduced. This will provide the ability to query, via LeadConversionMappingRead or LeadConversionMappingReadAll API, or insert or update, via LeadConversionMappingUpsert API, lead conversion mapping programmatically.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Administrative Web Services to Manage Sales Process Configuration

Prior to Release 42, Sales Process was a Service API which only provided the ability to query sales processes via SalesProcessQueryPage API.

With Release 42, Sales Process Service API is now listed under Administrative Web Service. In additional to the SalesProcessQueryPage API to query sales processes, a new SalesProcessInsertOrUpdate API is introduced to allow the ability to insert or update sales processes.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

- The SalesProcess WSDL can now be downloaded under "Administrative Services" on the Web Services Administration page.
- With the move to Administrative Web Service, the SalesProcessQueryPage API remains the same as prior to Release 42. No changes are required to integrations using this API.

Administrative Web Services to Manage Sales Stage Configuration

In Release 42, a new Sales Stage Administrative Web Service is introduced. This will provide the ability to query, insert or update sales stages programmatically.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

7 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.

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.

8 Additional Resources

Before you begin setting up the new Oracle CRM On Demand Release 42 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 42 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 customer.

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