Oracle CRM On Demand

Administrator Preview Guide
Release 43

August 2021

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Document Versioning

Date	Version	Change Reference
August 31, 2021	20210831	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				
Enforce Product Category and Product Fields Match Each Other		✓		
Analytics				
Expose Opportunity/Lead/Campaign Book in Related Analytics Subject Areas				✓
Application Customization				
Ability to Define the Default Sort Order for Related Information Lists		✓		
Support Search Conditions to be Selectable in Search Layout Wizard		✓		
Usability				
Enhance Forecasting Email Notification to Include POD/Company Details				✓
Extend the Value Length for Picklist field 'Mr./Ms.' to 30 Characters				✓
Increase the Number of Supported Characters for Custom Object 01-40 Name Field to 100 Characters				✓
Update Timezones & DST Mappings				✓

Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
Web Services				
Ability to Sort Responses from Access Profile and Dynamic Layout Admin APIs and Migration Tool				✓
Administrative Web Services to Manage Client-Side Extensions				✓
Administrative Web Services to Manage 'Process Administration - Transition State' Configurations				✓

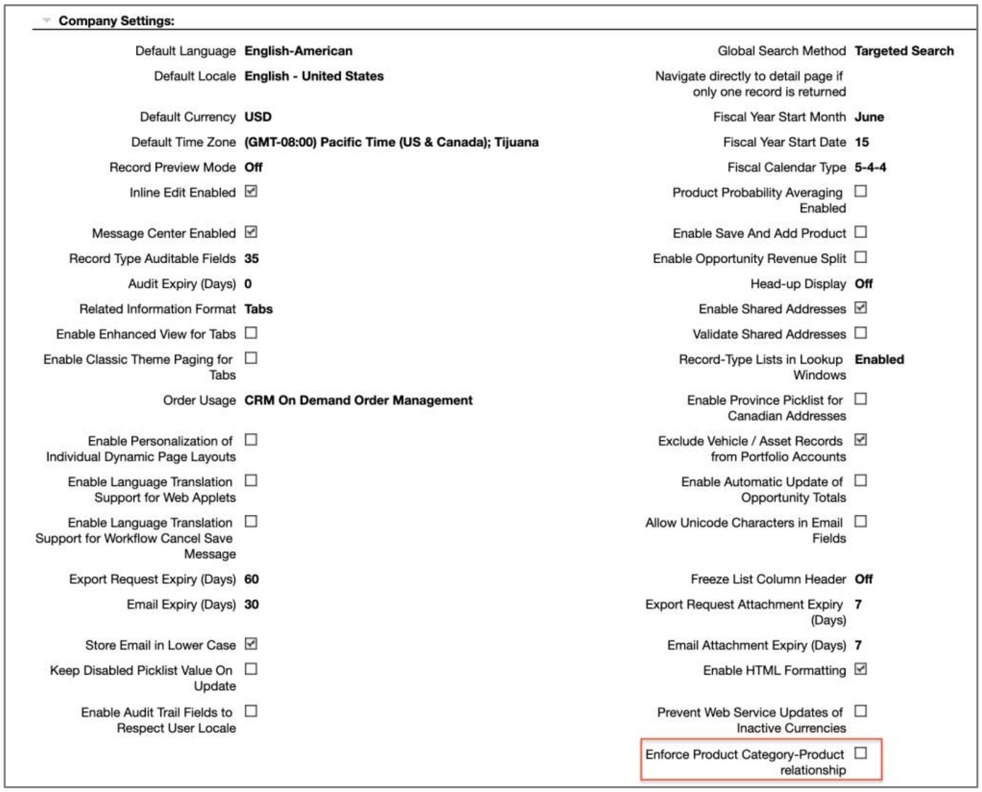
2 Administration

Enforce Product Category and Product Fields Match Each Other

In Release 43, the enforcement of the Product Category and Product relationship is extended to more record types, and the opt-in setting in the Company Profile page is renamed to 'Enforce Product Category-Product relationship'. When administrators select the checkbox to opt in, users are prompted through a pop-up error message if the Product and Product Category are not related and the enforcement is applied to all the following record types:

- Opportunity Revenue
- Account Revenue
- Contact Revenue
- Course
- Exam
- Certification
- Accreditation

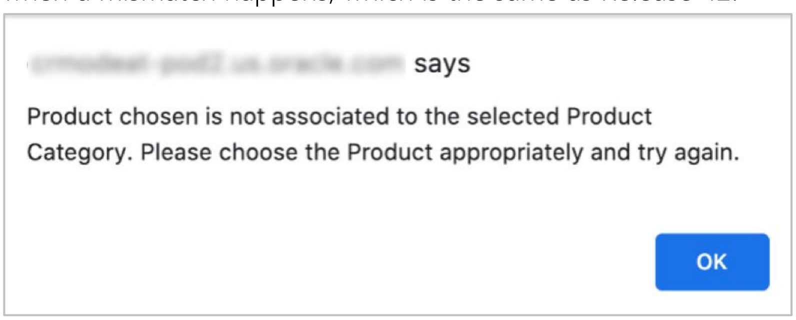
The following illustrations show the renamed checkbox field on the company profile page and the pop-up error message that users will see when the enforcement is enabled and mismatching happens.



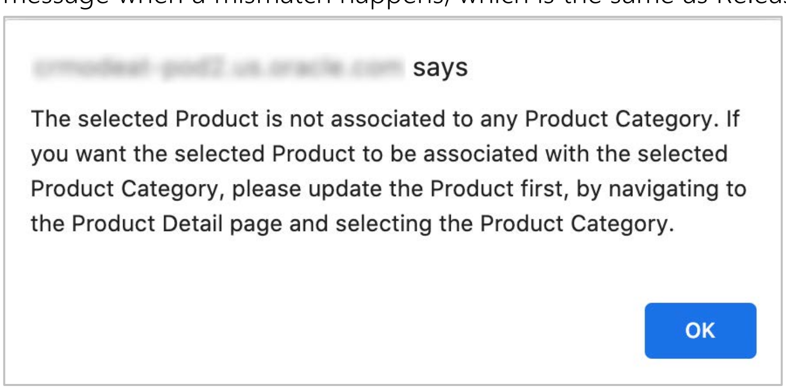
Company Settings:

Default Language	English-American	Global Search Method	Targeted Search
Default Locale	English - United States	Navigate directly to detail page if only one record is returned	
Default Currency	USD	Fiscal Year Start Month	June
Default Time Zone	(GMT-08:00) Pacific Time (US & Canada); Tijuana	Fiscal Year Start Date	15
Record Preview Mode	Off	Fiscal Calendar Type	5-4-4
Inline Edit Enabled	☑	Product Probability Averaging Enabled	☐
Message Center Enabled	☑	Enable Save And Add Product	☐
Record Type Auditable Fields	35	Enable Opportunity Revenue Split	☐
Audit Expiry (Days)	0	Head-up Display	Off
Related Information Format	Tabs	Enable Shared Addresses	☑
Enable Enhanced View for Tabs	☐	Validate Shared Addresses	☐
Enable Classic Theme Paging for Tabs	☐	Record-Type Lists in Lookup Windows	Enabled
Order Usage	CRM On Demand Order Management	Enable Province Picklist for Canadian Addresses	☐
Enable Personalization of Individual Dynamic Page Layouts	☐	Exclude Vehicle / Asset Records from Portfolio Accounts	☑
Enable Language Translation Support for Web Applets	☐	Enable Automatic Update of Opportunity Totals	☐
Enable Language Translation Support for Workflow Cancel Save Message	☐	Allow Unicode Characters in Email Fields	☐
Export Request Expiry (Days)	60	Freeze List Column Header	Off
Email Expiry (Days)	30	Export Request Attachment Expiry (Days)	7
Store Email in Lower Case	☑	Email Attachment Expiry (Days)	7
Keep Disabled Picklist Value On Update	☐	Enable HTML Formatting	☑
Enable Audit Trail Fields to Respect User Locale	☐	Prevent Web Service Updates of Inactive Currencies	☐
		Enforce Product Category-Product relationship	☐

If the chosen Product is defined with Product Category, the pop-up window displays the following error message when a mismatch happens, which is the same as Release 42:



If the chosen Product is defined without Product Category, the pop-up window displays the following error message when a mismatch happens, which is the same as Release 42:



STEPS TO ENABLE

1. By default, the 'Enforce Product Category-Product relationship' checkbox on the Company Profile page is unchecked.
2. To opt-in, administrators need select the 'Enforce Product Category-Product relationship' checkbox.
3. To opt-out, administrators need to unselect the 'Enforce Product Category-Product relationship' checkbox.

TIPS AND CONSIDERATIONS

1. When the Product Category field is editable in the record detail pages, company administrators may consider selecting the 'Enforce Product Category-Product relationship' on the Company Profile page so that Product Category and Product match each other.
2. When the company administrators enable the enforcement, users cannot save (neither update nor create new) records of the listed record types if the Product Category and Product mismatch.

3 Analytics

Expose Opportunity/Lead/Campaign Book in Related Analytics Subject Areas

Prior to Release 43, the Book sub-folder is not exposed under the Opportunity, Lead and Campaign dimensions, so that Book visibility does not apply to Opportunity, Lead and Campaign.

In Release 43, the Book folder is exposed under the Opportunity, Lead and Campaign dimensions in all subject areas where the Opportunity, Lead and Campaign dimensions are exposed, and the record visibility for these objects is restricted based on the book selection in the book selector.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

4 Application Customization

Ability to Define the Default Sort Order for Related Information Lists

The Related Information lists in the parent record detail pages are sorted by the system by default. Prior to Release 43, only a few Related Information layouts have the options for administrators to define the sort order to override the system default sort order enabled.

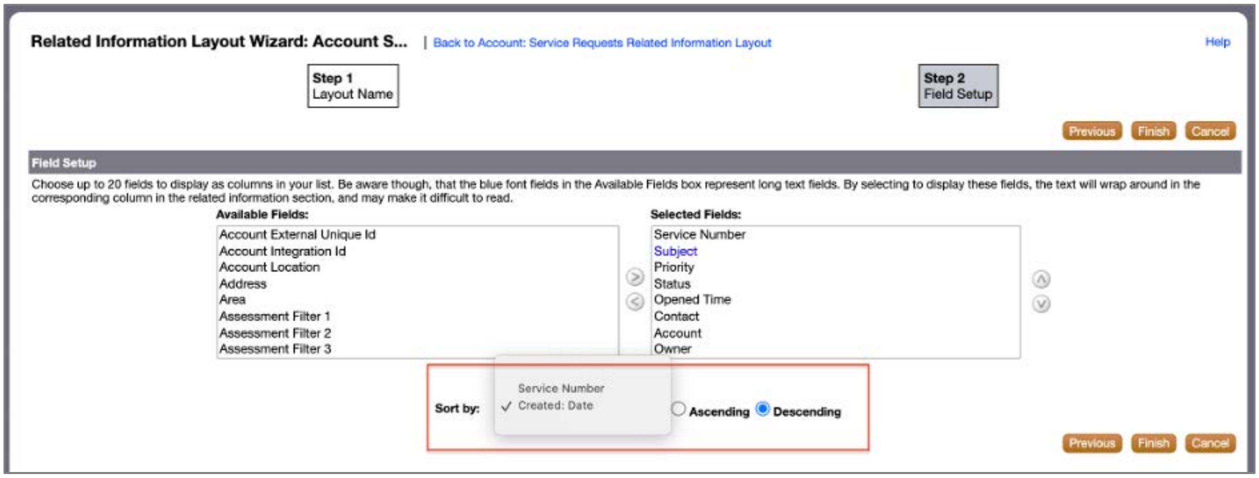
In Release 43, the ability to define the default sort order in the related information layout wizard is extended to more objects. The table below shows the list of parent record type and the related item combinations for which administrators can define the default sort order that are enabled in Release 43.

Refer to the 'Support for the Sort Feature for Related Items' topic in the Online Help for the full list of parent record type and related item combinations for which administrators can optionally select a sort field and specify the sort order (ascending or descending).

Parent Record Type	Related Item	Sort Fields
Account	Completed Activities	Due date
	Custom Object 05	Name
	Open Appointments	Start Time
	Service Request	Created: Date SR Number
Contact	Completed Activities	Due Date
	Open Appointments	Start Time
	Service Request	Created: Date SR Number
Opportunity	Completed Activities	Due Date
	Contacts	Last Name
	Custom Object 06	Name
	Open Appointments	Start time
Service Request	Completed Activities	Due Date
	Open Appointments	Start Time

The following screenshot illustrates the available sorting field options and orders in the Related Information Layout

Wizard for Service Request as a related information for Account.



STEPS TO ENABLE

1. Administrators define the default sort order for a related information list while creating or modifying the Related Information Layout by specifying the following options:
    a. Select a field from the ‘Sort by’ drop down box
    b. Choose whether the sort order should be ascending or descending
2. Administrators assign the Related Information Layout to parent record page layouts
3. Administrators assign the record page layout to users’ roles

TIPS AND CONSIDERATIONS

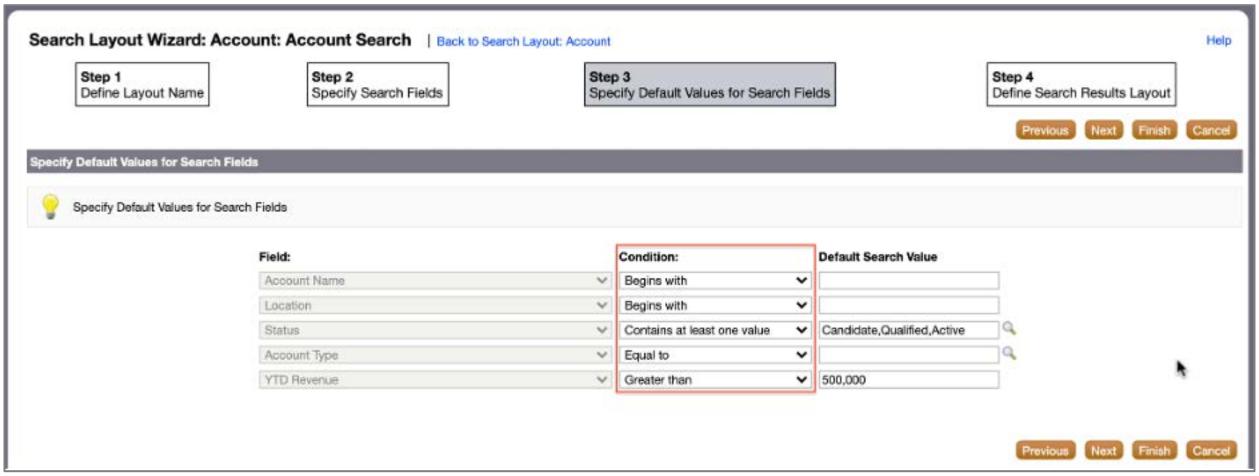
1. Company administrators can create Related Information Layouts and specify the default sort order for Related Information under the selected parent record types.
2. Users with the record page layout(s) assigned to no longer need to click the Show Full List link to sort the related information rows on the specified parent record detail pages.

Support Search Conditions to be Selectable in Search Layout Wizard

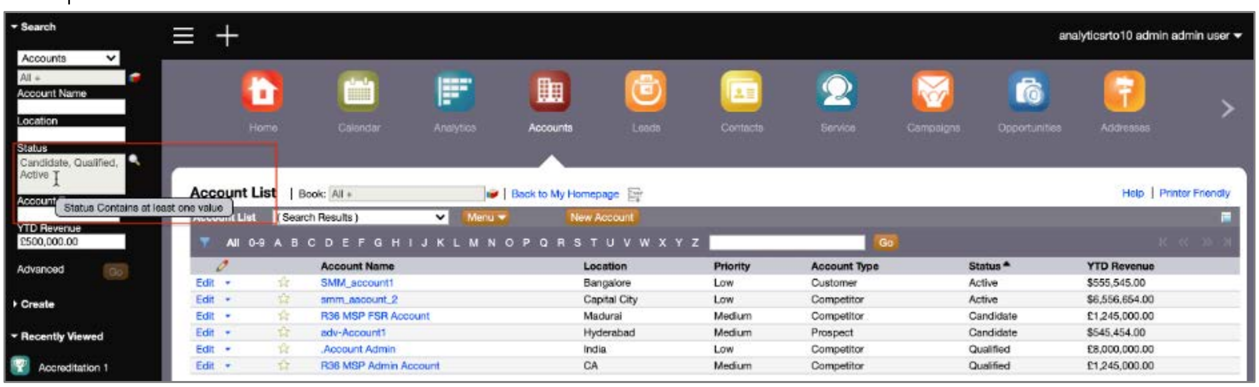
Prior to Release 43, search conditions in the search layout wizard are read-only. Search conditions are set to the system default values based on the data type of the search fields. Users are not able to identify the search conditions from the search applet in the action bar.

In Release 43, search conditions in the search layout wizard are selectable. Furthermore, the search condition of each search field in the search applet will be displayed as a tooltip in the action bar when users move the mouse over the search field value boxes.

The illustration below shows an example of a search layout for Account Search, where the search condition for the Status field is set to Contains at least one value, with the default search value set to multiple picklist values, and the search condition for the YTD Revenue field is set to Greater than, with the default search value set to 500,000.



The following illustration shows the search results based on the above search layout settings. When the user hovers the mouse over the Status field value box in the search applet, the defined search condition is displayed as a tooltip near the mouse cursor.



STEPS TO ENABLE

1. Administrators can select the search conditions while creating or modifying the search layouts. In step 3 of the Search Layout wizard, select the search conditions from the drop down list and then specify the default search values
2. Administrators need to assign the defined search layout to user's roles.

TIPS AND CONSIDERATIONS

1. Search Layouts are for targeted search only.
2. Users can see the search condition defined in the search layout as tooltip by hovering the mouse over on a search field value in the Action bar, unless the field is a checkbox field.

5 Usability

Enhance Forecasting Email Notification to Include POD/Company Details

Prior to Release 43, the forecasting notification emails sent to Company Administrators do not provide the originating POD or company details, or who initiated the action. It is difficult for customers with multiple PODs and companies to identify which POD or company the forecasting notification pertains to.

Starting in Release 43, forecast notification emails have been enhanced to include the POD ID and company (tenant) details.

STEPS TO ENABLE

None

TIPS AND CONSIDERATIONS

None

Extend the Value Length for Picklist field 'Mr./Ms.' to 30 Characters

Prior to Release 43, values in the Mr./Ms. picklist field are restricted to 15 characters for all languages. Users get a pop-up error message if they try to save a value that has more than 15 characters.
In Release 43, the Mr./Ms. picklist field allows values of up to 30 characters for all languages. Listed below are the record types that have the Mr./Ms. picklist field:

- Contact
- Contact Household
- Lead
- Deal Registration
- Personal Profile
- Patient
- User

STEPS TO ENABLE

None

TIPS AND CONSIDERATIONS

None

Increase the Number of Supported Characters for Custom Object 01-40 Name Field to 100 Characters

Prior to Release 43, the Name field for all Custom Object record types supports up to 50 characters.

In Release 43, the maximum length of the Name field for all Custom Object record types are extended to 100 characters.

STEPS TO ENABLE

None

TIPS AND CONSIDERATIONS

None

Update Time Zones & DST Mappings

In Release 43, Oracle CRM On Demand uptakes the latest time zone changes complying with the Oracle approved DST v35, 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.

STEPS TO ENABLE

None

TIPS AND CONSIDERATIONS

None

6 Web Services

Ability to Sort Responses from Access Profile and Dynamic Layout Admin APIs and Migration Tool

Access profile and Dynamic layout Administrative Web Service APIs as well as Access profile and Dynamic layout areas in the migration tool have been enhanced to support sorting. Access profile can be sorted by access profile name, or by access object name for each access profile. Dynamic layouts can be sorted by dynamic layout name or object, or by picklist value name for each dynamic layout.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Administrative Web Services to Manage 'Process Administration - Transition State' Configurations

In Release 43, a new Process Administration Transition State Administrative Web Service is introduced. This will provide the ability to query, insert, update, or delete transition states on processes programmatically.

STEPS TO ENABLE

There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

None

Administrative Web Services to Manage Client Side Extensions

In Release 43, a new Client Side Extensions Administrative Web Service is introduced. This provides the ability to query, insert, or update client side extensions programmatically.

STEPS TO ENABLE

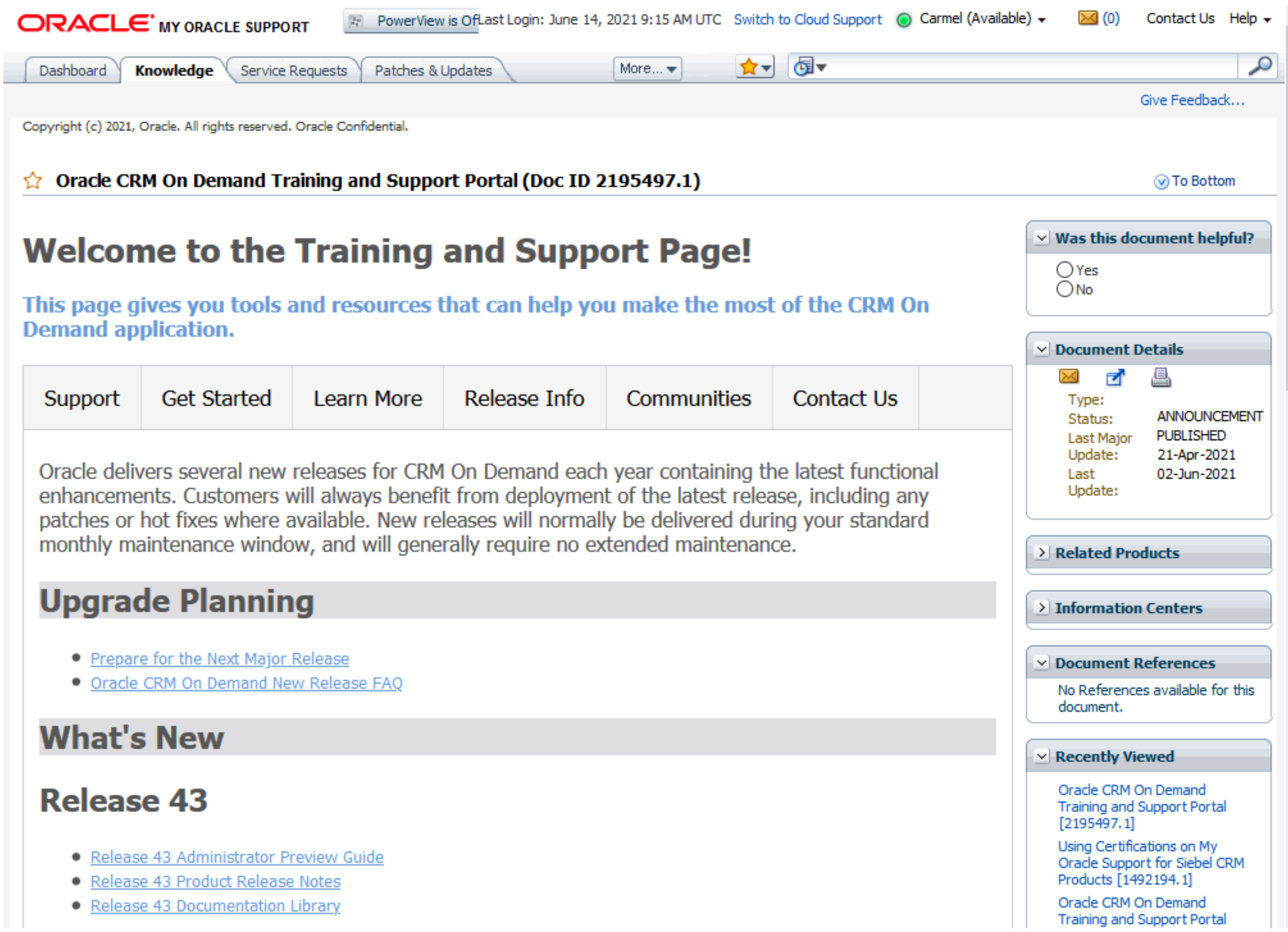
There are no steps to enable this feature.

TIPS AND CONSIDERATIONS

The Client Side Extensions Administrative Web Service uses the Message Transmission Optimized Mechanism (MTOM) specification with the XML-binary Optimized Packaging (XOP) convention and the Multipurpose Internet Mail Extensions (MIME) standard. MTOMextract and return the client side extension configuration data and the files attached to the client side extensions. There is the option to use either MTOM/XOP or base64 encoding data to update client side extensions.

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 43 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.

CRM 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.