ORACLE

CRM ON DEMAND

Administrator Preview Guide

Release 34

February 2017
VERSION 20170224

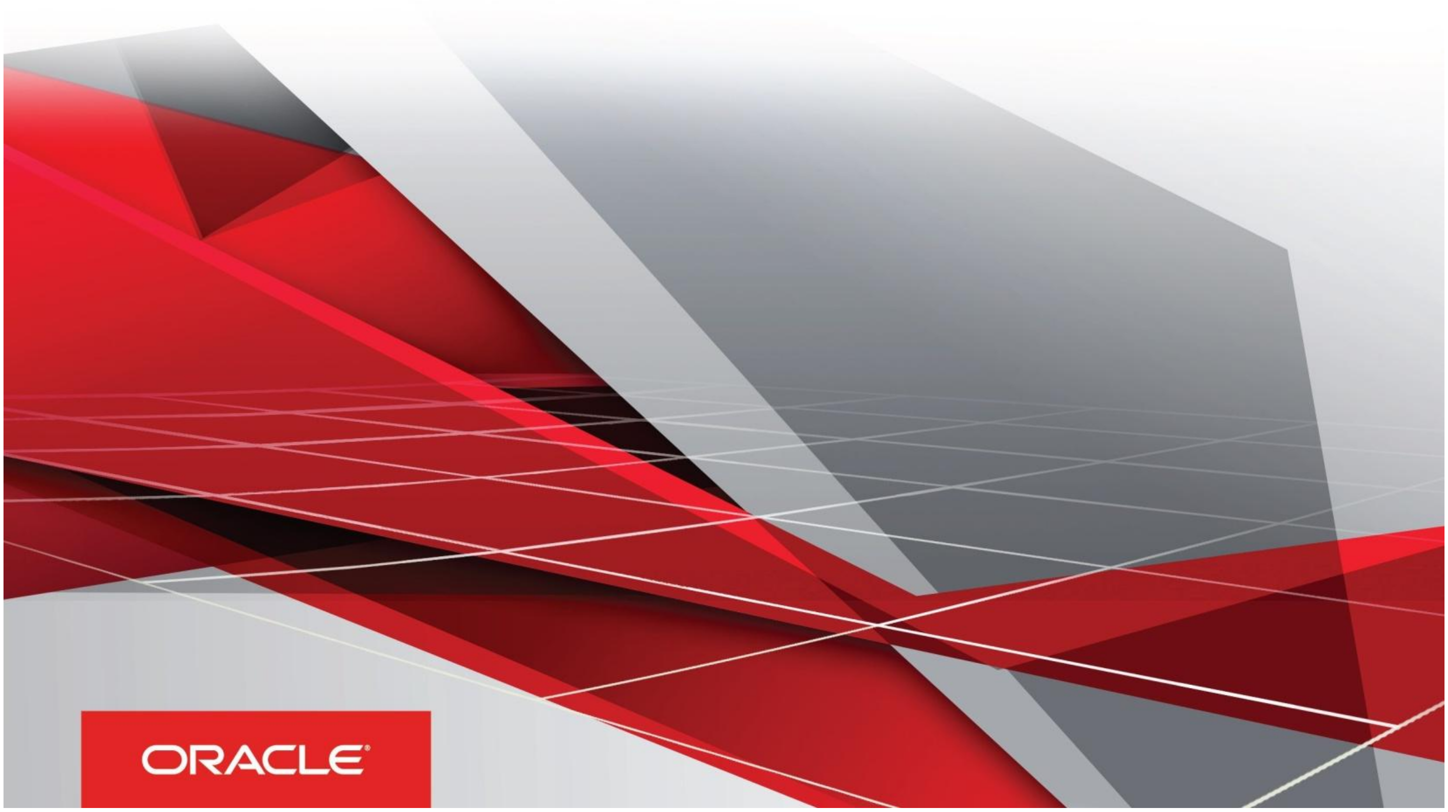


Table of Contents

Document Versioning

Date	Version	Change Reference
February 24, 2017	20170224	Final version published
January 26, 2017	20170126	Draft published

Summary of Release Features

For an overview of the features included in this release, see the Transfer of Information (TOI):

http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html

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.

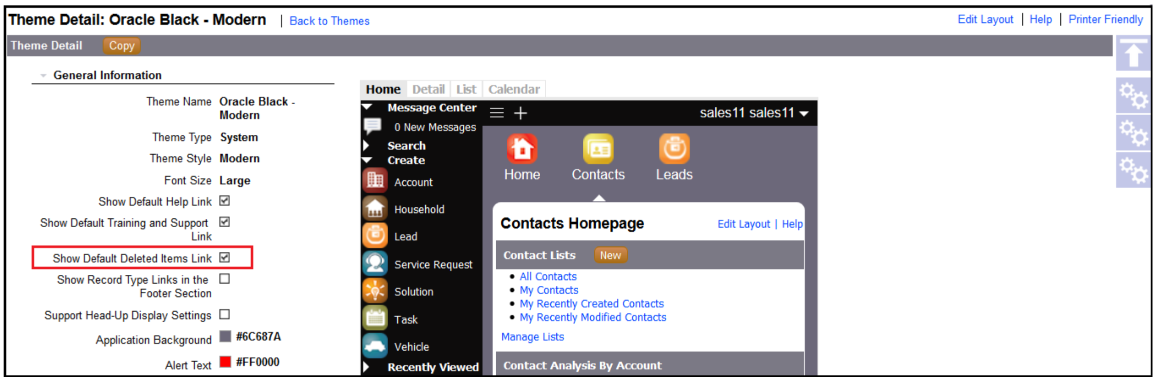
Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
Administration				
Ability to Hide the Global Link 'Deleted Items'		✓		
Company Alerts Based on Role		✓		
Head-Up Display at Theme Level and Modern Theme Support		✓		
Secure Login Page				✓
Analytics				
Ability to Report Primary Account Data within Contact Team Analysis				✓
Report Services API with Parameter Passing Option for Filters				✓
Connected Mobile Sales				
Ability to Configure Account Search Fields		✓		
Autofill in Associated Account when Creating a Lead Related to an Account				✓
Custom Note Field Support for Contact and Custom Objects 4 to15		✓		
Image Support for Contact Detail Pages		✓		
Menu Options for Various Record Types		✓		
Integration				
Add REST API to Query Campaign Recipients Child Objects				✓
Enable Modification Tracking Support for Address Updates from Geocoder				✓

Feature	Customer Care Action Required?	Administrator Action Required?	User Action Required?	Immediate User Availability
Usability				
Ability to Hide the Calendar View and Open Task Pane in Calendar Pages				✓
Ability to See Parent Books Hierarchy in Book Selector		✓		
Add Address Field with Lookup Function to Custom Objects				✓
Add AS, FM, GU, MP, MH, PW, UM, VI to the List of States for United States Address Format				✓
Add New Fields and Change Labels for Certain Countries in Address Object				✓
Allow Resizing Existing Appointments by Adjusting the Start and End Time in Calendar				✓
Auto Number Picklist Entries				✓
Enable Ability to Provide Popup Reminder for an Activity		✓	✓	
Enable Action Bar Search and List Management for Assets		✓		
Fiscal Calendar Naming by Start Year/End Year				✓
Lead Cascading Picklist to Display Cascaded Reject Code Values when Lead Status Is Rejected				✓
Locale Support for Slovakia & Romania				✓
Option to Keep Multi-Select Picklist Value from Both Records in a Merge				✓
Provide Options to Change Default Search Criteria for Lookup Windows		✓		
Validation of Percentage Split Field of Opportunity Team in All Input Channels				✓
Web URL Clickability and Smart Associations in Concatenated Fields		✓		
Web Services				
Activity Exposed as Child of Service Request Web Services 2.0				✓
Administrative Web Services to Manage Process Administration				✓
Workflows				
Add 'Activity Subtype' to Create Task Workflow Action				✓
Add IsValidRowId, Lower and Upper Functions in Expression Builder				✓
Add Record RowId in Workflow Wait Monitor				✓
Extend Logging for Expression Related Errors in Workflow Error Monitor				✓

Administration

Ability to Hide the Global Link 'Deleted Items'

This feature introduces a setting at the theme level, “Show Default Deleted Items Link”, which is selected by default. If the company administrator deselects the setting for a theme, the Deleted Items global link is hidden from the users who use that theme.

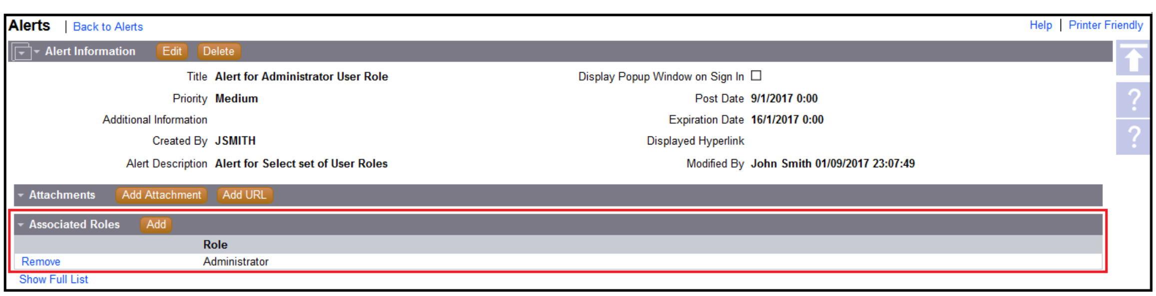


STEPS TO ENABLE

1. In Oracle CRM On Demand, click Admin, then click Application Customization, and then click Themes.
2. Create a new theme, or edit an existing custom theme.
3. To hide the Deleted Items link, deselect the Show Default Deleted Items Link check box.
4. Save your changes.

Company Alerts Based on Role

Prior to Release 34, company alerts were displayed to all users in the company. This feature allows company administrators to associate alerts with specific roles. Oracle CRM On Demand displays such alerts only to the users who are assigned to those roles.



STEPS TO ENABLE

1. In Oracle CRM On Demand, click Admin, then click Company Administration, and then click Company Alerts.
2. Create a new alert and save it, or drill down on the Title field of an existing alert.

3. To associate a specific role with the alert, select the role in the Associated Roles related information section of the page.
4. Save your changes.

Head-Up Display at Theme Level and Modern Theme Support

Prior to Release 34, the head-up display (HUD) was configurable at the company level and at user level, and was supported for classic themes only. This feature introduces a setting at the theme level that, when enabled, respects the head-up display settings at the company level and at user level. When the setting is deselected, the head-up display is never displayed, irrespective of the settings at the company level and at user level. The new setting is called “Support Head-Up Display Settings”

STEPS TO ENABLE

1. In Oracle CRM On Demand, click Admin, then click Application Customization, and then click Themes.
2. Create a new theme, or edit an existing custom theme.
3. To enable the setting, select the Support Head-Up Display Settings check box.
4. Save your changes.

TIPS AND CONSIDERATIONS

When the setting is deselected at the theme level, the HUD will never display, irrespective of the settings at the company level and at user level.

Secure Sign-In Page

To improve the security of sign-in pages, changes have been implemented so that Oracle CRM On Demand sign-in pages cannot be embedded within other web pages. Customers who currently embed the sign-in page within another web page will need to remove the embedding and add custom code using specific parameters as outlined in the Tips and Considerations section.

TIPS AND CONSIDERATIONS

The following is an example of a custom sign-in page:

```
<FORM METHOD=”POST” ACTION=”https://secure.crmondemand.com/OnDemand/authenticate”>
        User Sign In ID: <INPUT TYPE=”text” NAME=”j_username”>
        Password: <INPUT TYPE=”password” NAME=”j_password”>
</FORM>
```

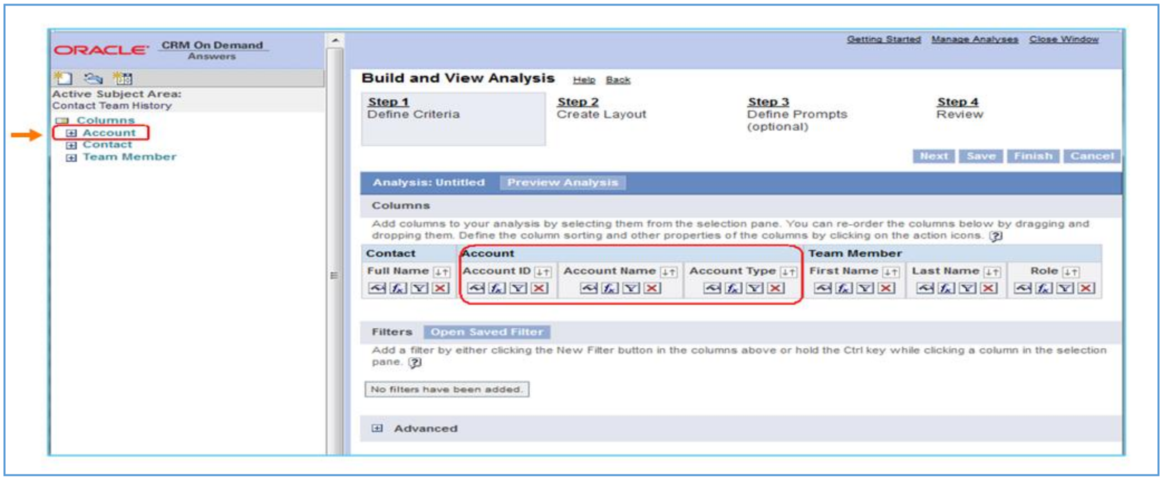
Note that the j_username and j_password parameters must be used in the NAME variable for the custom sign-in page.

Analytics

Ability to Report Primary Account Data within Contact Team Analysis

In Release 34, a new Account dimension has been added to the Contact Team History subject area, providing the option to report on the Primary Account details of contacts, along with their team details.

.



STEPS TO ENABLE

There are no steps required to enable the feature.

Report Services API with Parameter Passing Option for Filters

In Release 34, users can pass report filters as parameters when calling the Report Services API for offline scheduling and downloading of Oracle CRM On Demand Analytics reports.

In the ReportExecute method of the Report Services API, a new parameter '&Action=Filter' has been added. It is used together with the following parameters:

- &P0 parameter, indicating the number of parameters being used in the call
- &P1 parameter, indicating the operator
- &P2 parameter, indicating the name of the column
- &P3 parameter, indicating the value of the column

Users can specify up to six filters, in sets of parameters. The first filter is specified in parameters P1-P3, and subsequent filters are specified in parameters P4-P6, P7-P9, P10-P12, P13-P15 and P16-P18.

You can invoke the Report Services API from a command line tool such as wget, The Report Services API executes the specified report and delivers the report output after applying the report filters specified in the API call. Other parameters, output formats, allocations, and so on, remain unchanged for the Report Services API.

ReportExecute Call sample using Wget

- Prior to Release 34
  - wget --content-on-error --load-cookie "cookiefile1.txt" --output-document "pathname.pdf" https://secure-servername>/OnDemand/user/ReportService?Method=ReportExecute&Path=<ReportPathandName>&Format=pdf&Refresh=Y --max-redirect=100
- In Release 34
  - wget --content-on-error --load-cookie "cookiefile1.txt" --output-document "pathname.pdf" https://secure-servername>/OnDemand/user/ReportService?Method=ReportExecute&Path=<ReportPathandName>&Format=pdf&Refresh=Y**&Action=Filter&P0=2&P1=<op>&P2=<FilterColumn1Name>&P3=<FilterColumn1Value>&P4=<op>&P5=<FilterColumn2Name>&P6=<FilterColumn2Value>** --max-redirect=100

STEPS TO ENABLE

There are no steps required to enable the feature.

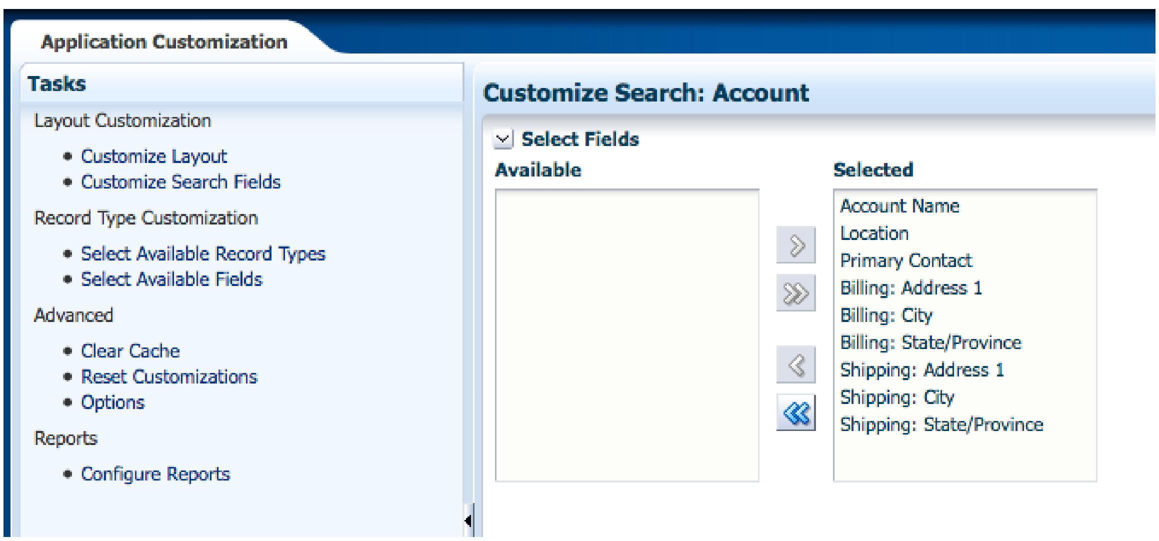
TIPS AND CONSIDERATIONS

If you invoke the Report Services API with filters, and if you select the PDF format for the download, then make sure to change the Rows per Page property in the report Table view to the required number to include all of the records for the report. Otherwise, only 25 records will be downloaded by default.

Oracle CRM On Demand Connected Mobile Sales

Ability to Configure Account Search

Starting with Oracle CRM On Demand Connected Mobile Sales server v1.4.21, administrators can configure the layout for account searches.



STEPS TO ENABLE

1. Sign in to Application Composer.
2. Under the Layout Customization section, select Customize Search Fields.
3. Choose the record type for the search layout you want to modify.
4. Move the fields that you want displayed to the Selected section.
5. Save your settings.

Autofill in Associated Account when Creating a Lead Related to an Account

In Oracle CRM On Demand, when a user creates a child lead record from an Account Detail page, the Associated Account field is automatically populated with the name of the account record. Starting with Oracle CRM On Demand Connected Mobile Sales server v1.4.20, the same behavior has been implemented in the mobile application.

Custom Note Field Support for Contact and Custom Objects 04 to15

Starting with Oracle CRM On Demand Connected Mobile Sales server v1.4.20, administrators can expose custom note fields for the Contact and Custom Objects 04 through 15 record types.

STEPS TO ENABLE

1. Sign in to Application Composer.
2. Click Select Available Fields, and then choose the record type for which you want to make the custom note field available.
3. Move the custom note field to the Selected section.
4. Save your changes.
5. Click Customize Layout, and then choose the record type.
6. Click Customize List, and then move the custom note field to the Selected section.
7. Save your changes.
8. Click Customize Layout, and then choose the record type.
9. Click Customize Detail, and then move the custom note field to the Selected section.
10. Save your changes.

Image Support for Contact Detail Pages

In Oracle CRM On Demand, administrators can expose an image field for the Contact record type, to allow an image to be displayed directly on the Contact Detail page. In Oracle CRM On Demand Connected Mobile Sales server v1.4.21, the mobile application can be configured to display the same image.

STEPS TO ENABLE

1. Sign in to Oracle CRM On Demand,
2. Click Admin, then click Application Customization, and then click Customize Record Types.
3. Select the Display Image check box for the Contact record type, and then save your changes.
4. Sign in to Application Composer.
5. Choose the Clear Cache option so that the server can obtain the changes that were made in the Oracle CRM On Demand application.

Menu Options for Various Record Types

To allow users to perform commonly used actions more quickly and efficiently, menu options have been provided on Detail pages for various record types. The following table displays the options that have been made available:

Record Type	Options Available
Account	Add Attachment, Add Appointment, Add Task, Email Contacts, Email Team, Log a Call

Appointment	Add Attachment, Email Contacts and Users
Contact	Add Attachment, Add Appointment, Add Task, Log a Call
Lead	Add Attachment, Add Appointment, Add Task, Log a Call
Opportunity	Add Attachment, Add Appointment, Add Task, Email Contacts, Email Team, Log a Call
Task	Add Attachment

Integration

Add REST API to Query Campaign Recipients Child Object

Starting with Release 34, the set of REST APIs has been extended to provide the ability to retrieve, create, update or delete Campaign Recipients Objects. The following are now supported:

- https://POD/OnDemand/user/Rest/latest/Campaigns (GET)
- https://POD/OnDemand/user/Rest/latest/Campaigns/ROWID (GET)
- https://POD/OnDemand/user/Rest/latest/Campaigns/describe (GET)
- https://POD/OnDemand/user/Rest/latest/Campaigns/ROWID/describe (GET)
- https://POD/OnDemand/user/Rest/latest/Campaigns/ROWID/child/Recipients/describe (GET)
- https://POD/OnDemand/user/Rest/latest/Campaigns/ROWID/child/Recipients (GET)
- https://POD/OnDemand/user/Rest/latest/Campaigns/ROWID/child/Recipients (POST)
- https://POD/OnDemand/user/Rest/latest/Campaigns/ROWID/child/Recipients/ChildRowId (GET)
- https://POD/OnDemand/user/Rest/latest/Campaigns/ROWID/child/Recipients/ChildRowId (PATCH)
- https://POD/OnDemand/user/Rest/latest/Campaigns/ROWID/child/Recipients/ChildRowId (DELETE)

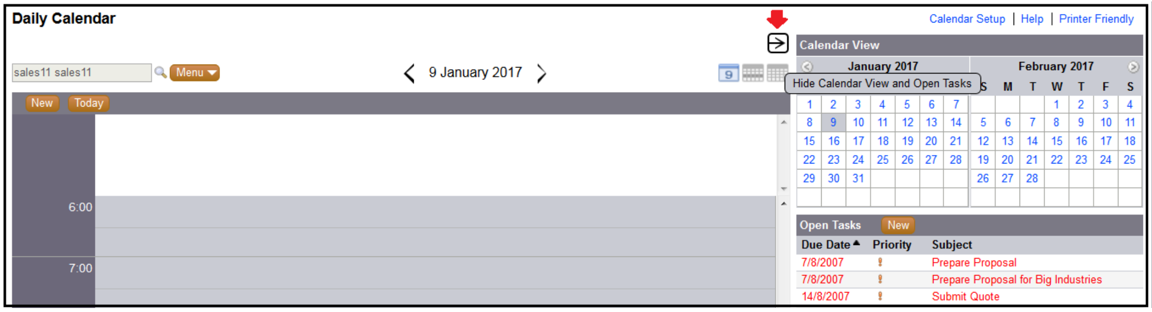
Enable Modification Tracking Support for Address Updates from Geocoder

Starting with Release 34, if modification tracking is enabled for the Address record type, then when Oracle Maps Geocoder updates the latitude or longitude on an Address record, modification tracking entries are generated, for both shared and non-shared addresses. The modification tracking entries contain details of the modified address such as Row ID and parent record information. For more details, please refer to *Oracle CRM On Demand Online Help* for Release 34.

Usability

Ability to Hide the Calendar View and Open Task Pane in Calendar Pages

A new icon in the Daily and Weekly Calendar pages allows users to show or hide the Calendar View and Open Tasks pane in those pages. Hiding the Calendar view and Open Tasks pane provides more space to display appointments on the screen. It also provides more space for displaying appointment details when printing the page.



Icon to hide Calendar View and Open Tasks pane

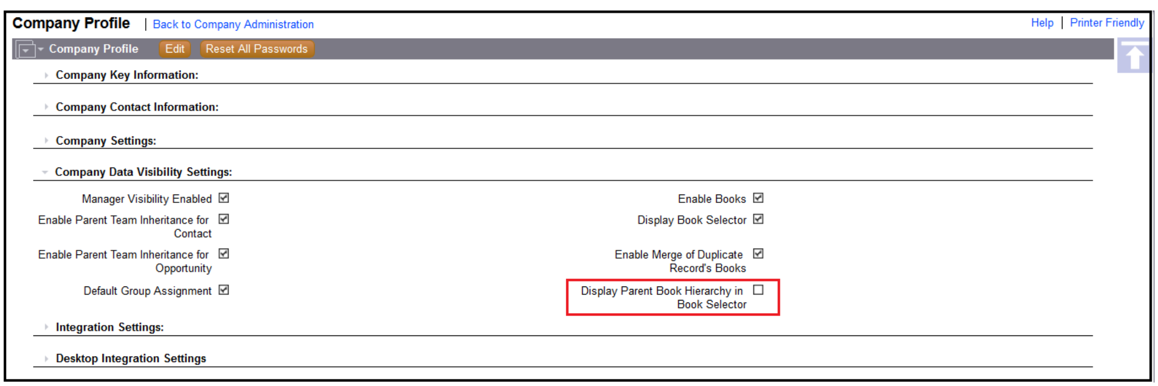
TIPS AND CONSIDERATIONS

The show/hide status of the Calendar View and Open Tasks pane persists until the user logs out of the session.

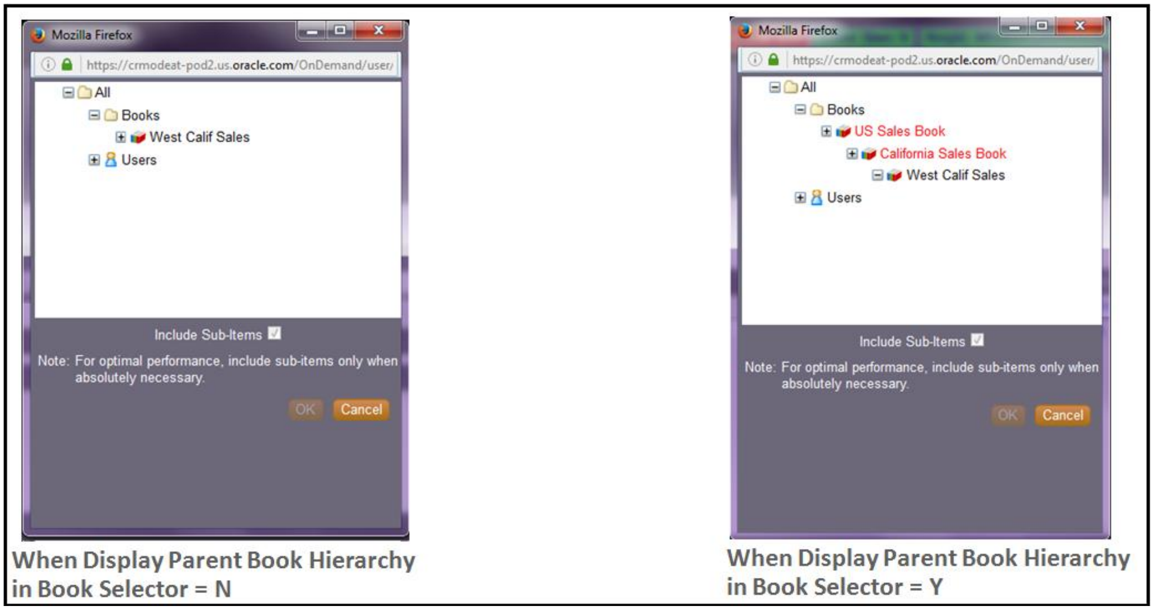
Ability to See Parent Books Hierarchy in Book Selector

This feature provides a new setting, “Display Parent Book Hierarchy in Book Selector”, in the Company Profile page. If this setting is selected, the book selector in areas such as the Action bar search, Advanced Search, List Management, Lookup Windows, Reports and Dashboards displays not only the book in which the user is added as a member and its child books, but also the books above the member book in the hierarchy.

Displaying the parent books in book selectors can provide the appropriate context for the users, especially when the names of the books might not be descriptive enough to allow users to select the correct book easily. However, there is no change in data security, as users will not be able to access the records in parent books.



Company Profile Setting



Books displayed in Book Selector

STEPS TO ENABLE

1. In Oracle CRM On Demand, click Admin, then click Company Administration, and then click Company Profile.
2. To enable the feature, select the Display Parent Book Hierarchy in Book Selector check box.
3. Save your changes.

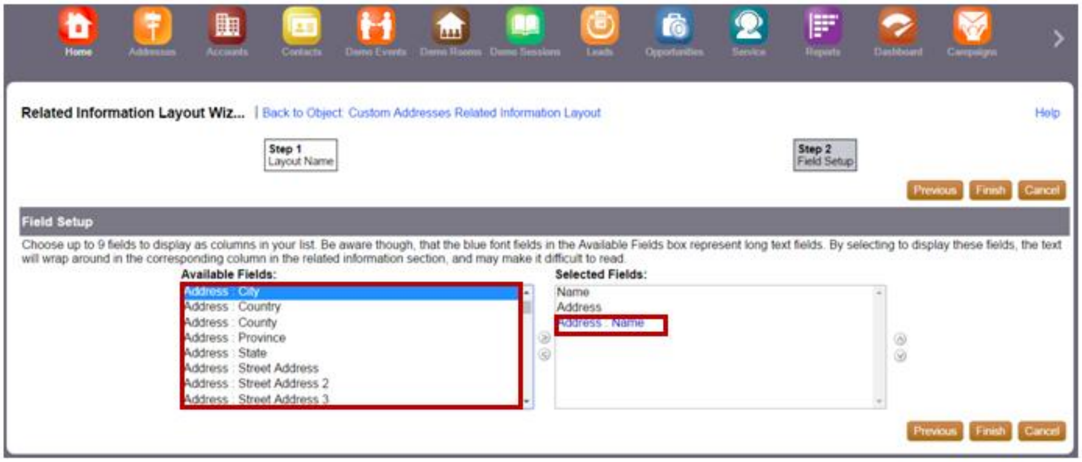
TIPS AND CONSIDERATIONS

The books above the user's member book in the hierarchy are displayed in red font, indicating that they are not selectable, as the user does not have access to those books.

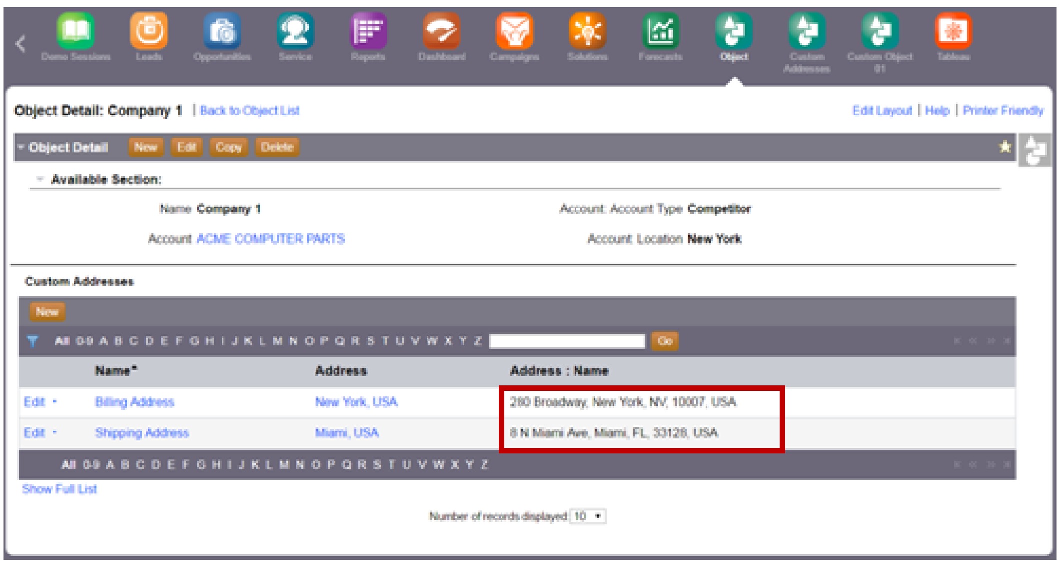
Add Address Field with Lookup Function to Custom Objects

Multiple addresses, for example billing and shipping addresses, can be associated with top-level custom objects by using another custom object storing these addresses, as a child object. With this feature, a new concatenated address field named 'Address : Name' is exposed to Custom Object record types in Oracle CRM On Demand, along with the fields 'Address : City', 'Address : Country', 'Address : County', 'Address : Province', 'Address : State', 'Address : Street Address', 'Address : Street Address 2', 'Address : Street Address 3' and 'Address : Zip/Post Code'.

Company administrators can now add these new fields to the page layouts for the Custom Object record types.



New Address fields exposed in a custom object, configured to store addresses



Custom object configured to store addresses is displayed as child for a top-level custom object, with the new 'Address : Name' added to the layout

Add AS, FM, GU, MP, MH, PW, UM, VI to the List of States for United States Address Format

In Release 34, the following states have been added to the list of states for the United States of America:

- AS – American Samoa
- FM – Federated States of Micronesia
- GU - Guam
- MH - Marshall Islands
- MP - Northern Mariana Islands
- PW - Palau
- UM - U.S. Minor Outlying Islands

- VI - U.S. Virgin Islands

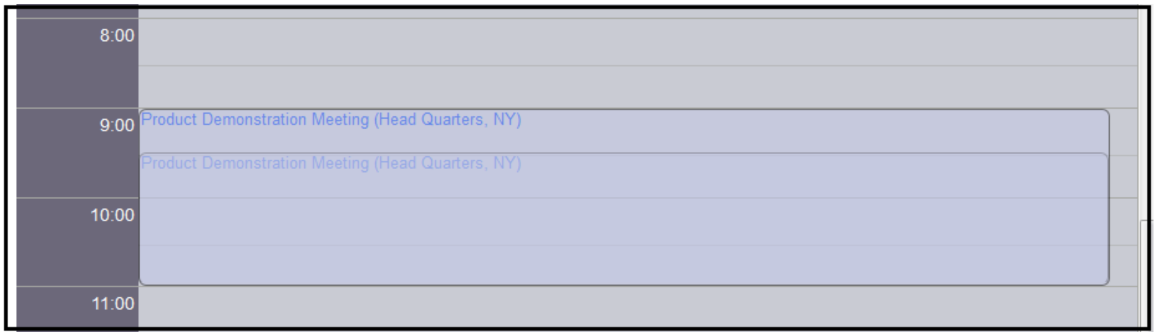
Add New Fields and Change Labels for Certain Countries in Address Object

In Release 34, the following changes have been made in the Address record type, for the specified countries:

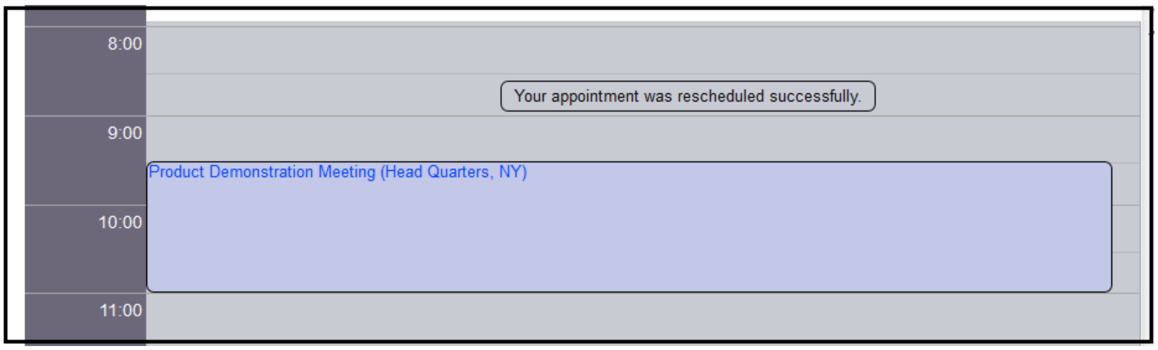
- For India, the Postal Code label has been renamed to Pin Code
- For Poland, a new field, Province, has been added
- For Peru, two new fields, Department and District, have been added

Allow Resizing Existing Appointments by Adjusting the Start and End Time in Calendar

This feature allows users to change the start time or end time of an appointment in a modern theme calendar, by dragging the horizontal edge of the appointment and dropping it at the required slot. When you hover your pointer over the horizontal edges, the pointer icon changes to a bi-directional arrow icon, indicating that the edges can be dragged.



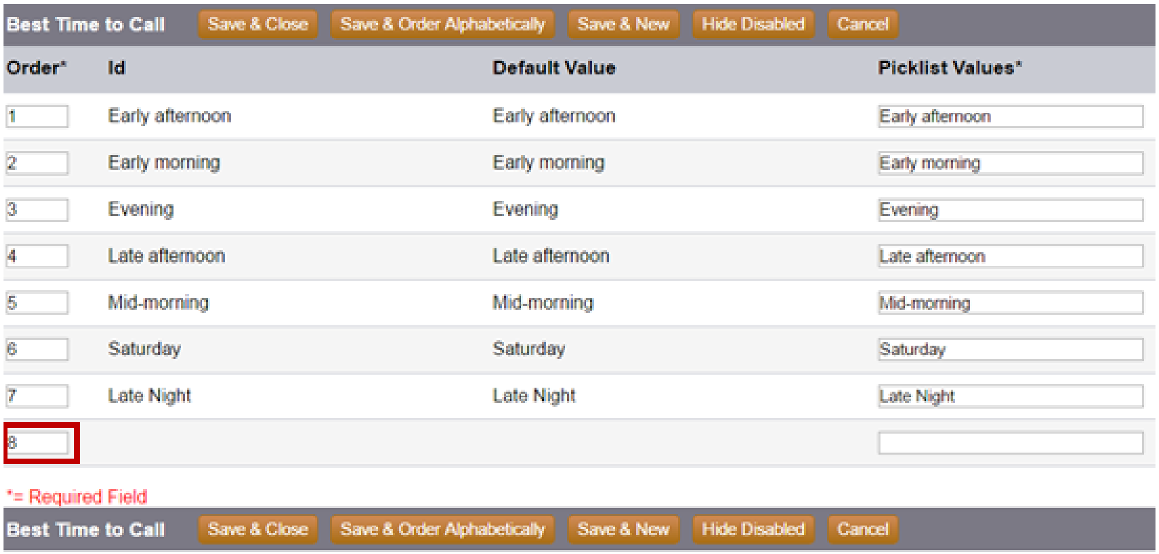
Dragging the top edge to change start time of appointment



Dropping to confirm the change in start time of appointment

Auto Number Picklist Entries

Starting with Release 34, the order number for a new picklist entry is automatically populated with the next available value.

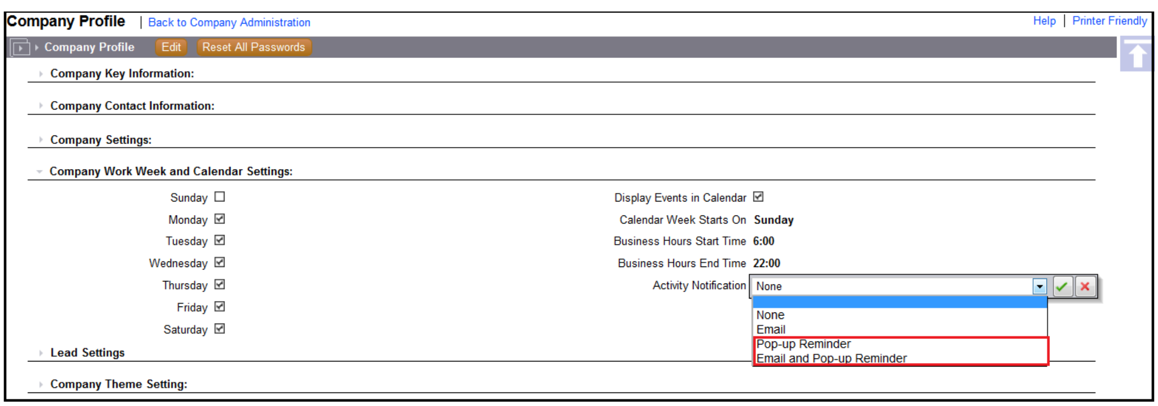


Order Number Populated Automatically

Enable Ability to Provide Popup Reminder for an Activity

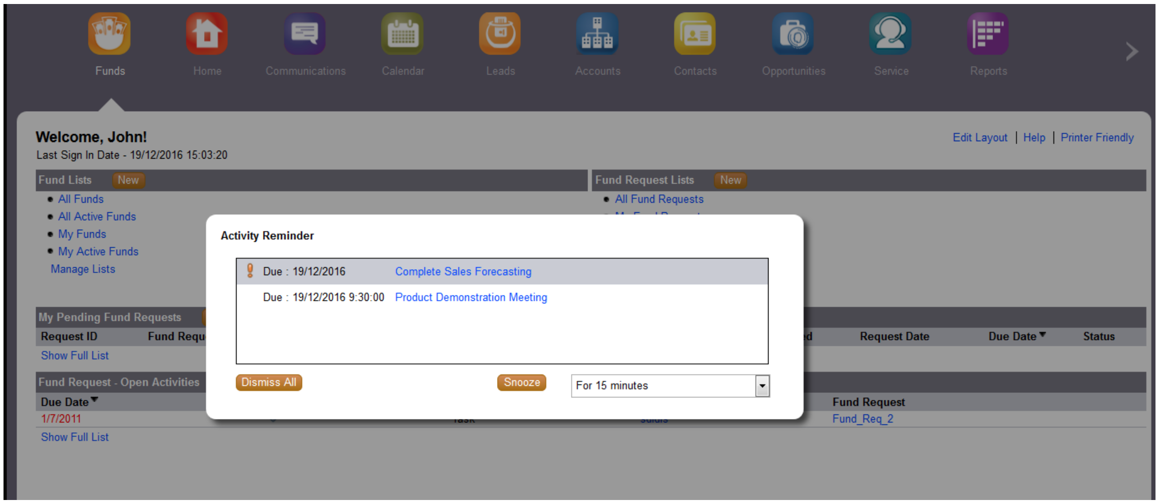
Release 32 introduced the ability to send email reminders to activity users when an activity is due. Starting with Release 34, activity reminders can be shown in a pop-up window on the screen, if the user is signed in to Oracle CRM on Demand.

Two new values are available in the Activity Notification setting in the company profile, namely “Pop-up Reminder” and “Email and Pop-up Reminder”. Company administrators can select one of these values if they want users to see pop-up reminders for their activities. The same settings are also provided at user level, so that the end users can override the company profile setting.



Company Profile Setting

Users can set reminders for individual activities. For activities that are due, Oracle CRM On Demand displays an on-screen pop-up reminder to the activity users and owner.



Pop-up reminder on the screen

STEPS TO ENABLE

Company Administrator setting

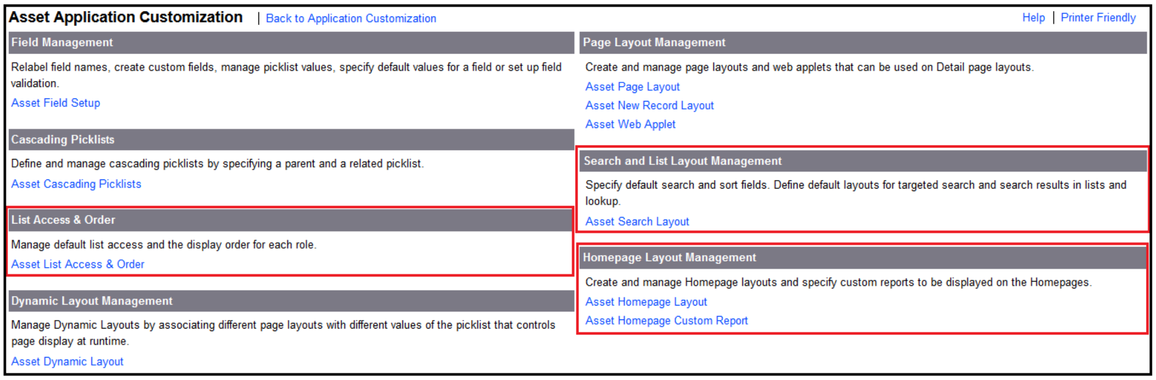
1. In Oracle CRM On Demand, click Admin, then click Company Administration, and then click Company Profile.
2. To enable the feature, in the Activity Notification field, select either Pop-up Reminder, or Email and Pop-up Reminder.
3. Save your changes.

End user setting

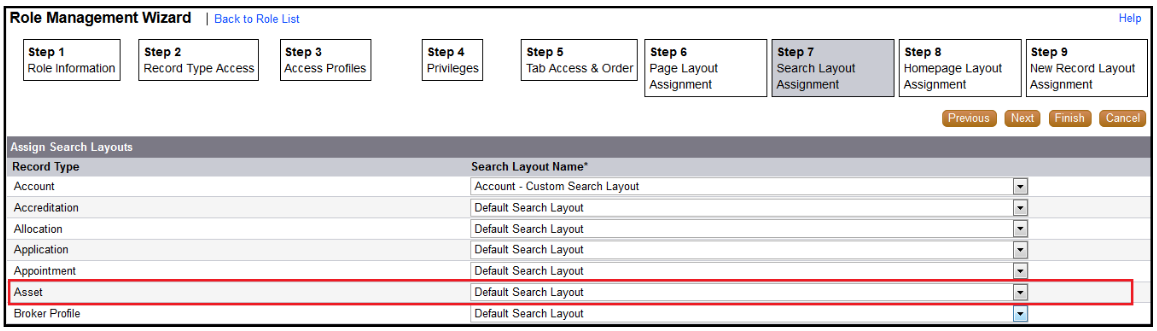
1. Click My Setup, then click Calendar Settings, and then click Default Calendar View.
2. To enable the feature or to override the Company Profile setting, in the Activity Notification field, select either Pop-up Reminder, or Email and Pop-up Reminder.
3. Save your changes.
4. In your appointments, set the reminder time for tasks using the Task Reminder field and set the reminder time for Appointments using the Appointment Reminder field.

Enable Action Bar Search and List Management for Assets

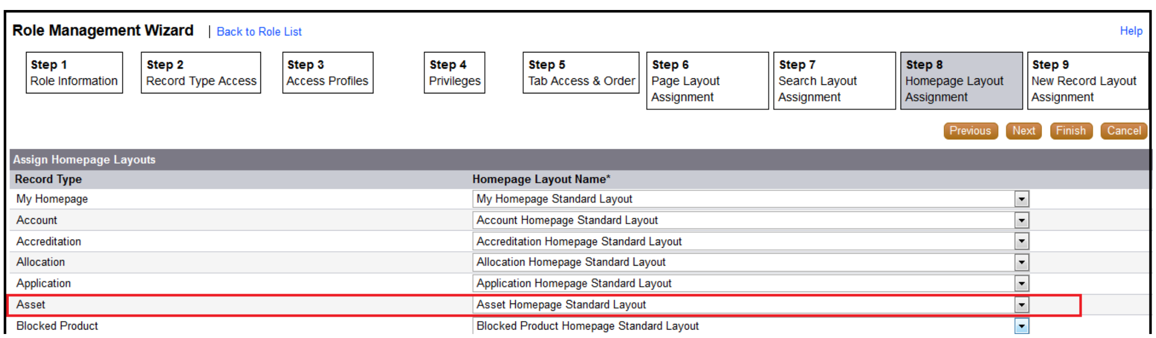
This feature introduces the ability to perform a targeted search for asset records from the Action Bar and to create lists of assets. It also allows company administrators to manage Homepage layouts, Search layouts and List Access & Order layouts for the Asset record type in the same way as any other top-level record type. Administrators can assign the asset page layouts to roles and make the Assets record type available to end users as a top-level object.



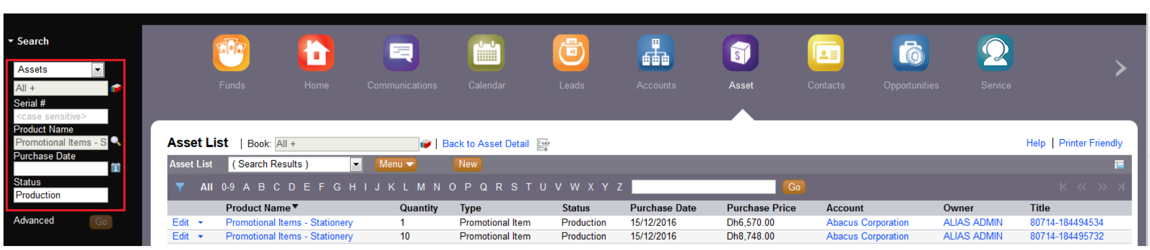
Application Customization: Company administrators can create custom layouts for the Asset record type



Assigning Asset Search Layout to Roles



Assigning Asset Homepage Layout to Roles



End Users can perform Targeted Search of Assets

STEPS TO ENABLE

1. In Oracle CRM On Demand, click Admin, then click Application Customization, and then click Asset.
2. To create or edit custom search layouts, click Asset Search Layout;
3. To create or edit custom Homepage layouts, click Asset Homepage Layout.
4. To create or edit the default list access and the display order for each role, click Asset List Access & Order.
5. To assign the custom layouts to a role, click Admin, then click User Management and Access Controls, and then click the Edit link for the role.
6. In Step 5 of the Role Management wizard, move the Asset record type to the Selected Tabs list.
7. In Step 7 of the Role Management wizard, select the Asset search layout that you want to assign to the role.
8. In Step 8 of Role Management wizard, select the Asset Homepage layout that you want to assign to the role.

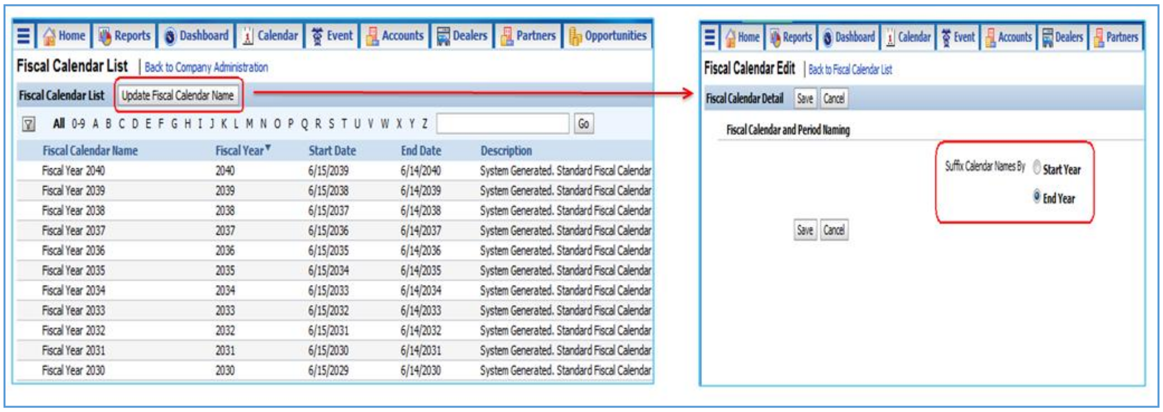
Fiscal Calendar Naming by Start Year / End Year

When a standard fiscal calendar is created, the calendar name is suffixed with the end year of the fiscal year by default. Prior to Release 34, no changes to the fiscal calendar names were allowed. In Release 34, administrators can update the format of the calendar name so that all of the fiscal calendar names and period names are suffixed with the start year of the fiscal year instead of the end year of the fiscal year.

» A new "Update Fiscal Calendar Name" button is available in the Fiscal Calendar Definition page in Company Administration.

» When you click this button, a Fiscal Calendar Edit page opens and you can choose to suffix the calendar names with either the Start Year or the End Year value.

» After you save your changes, all of the standard fiscal calendar names and the fiscal period names for the company are updated to the new format.

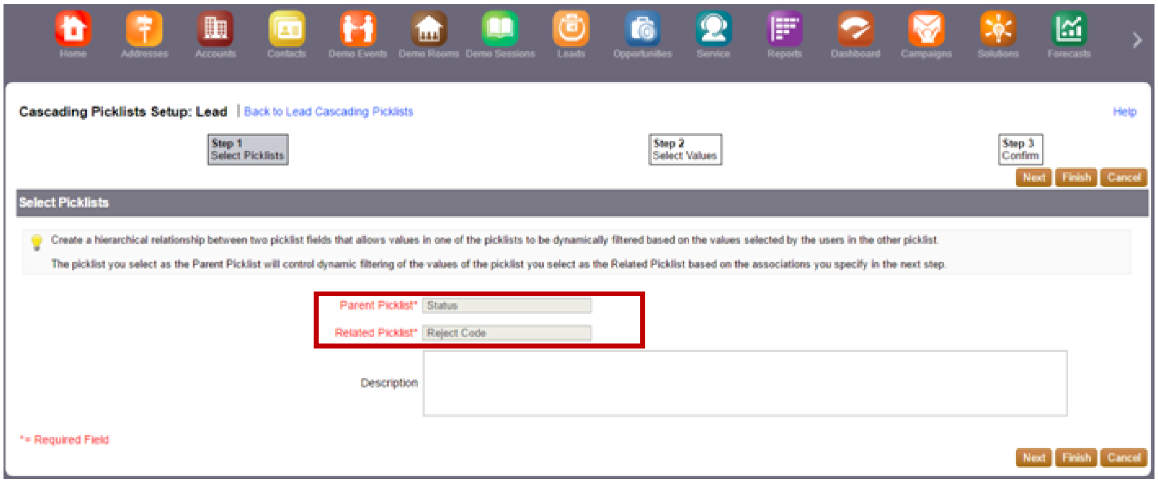


TIPS AND CONSIDERATIONS

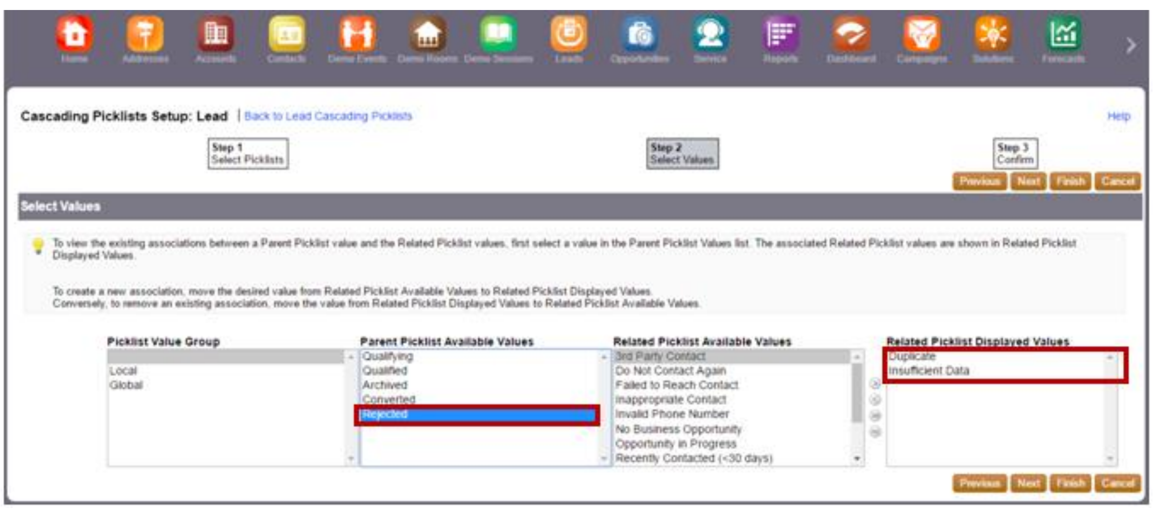
This feature applies only to standard fiscal calendars. It does not apply to custom fiscal calendars.

Lead Cascading Picklist to Display Cascaded Reject Code Values when Lead Status Is Rejected

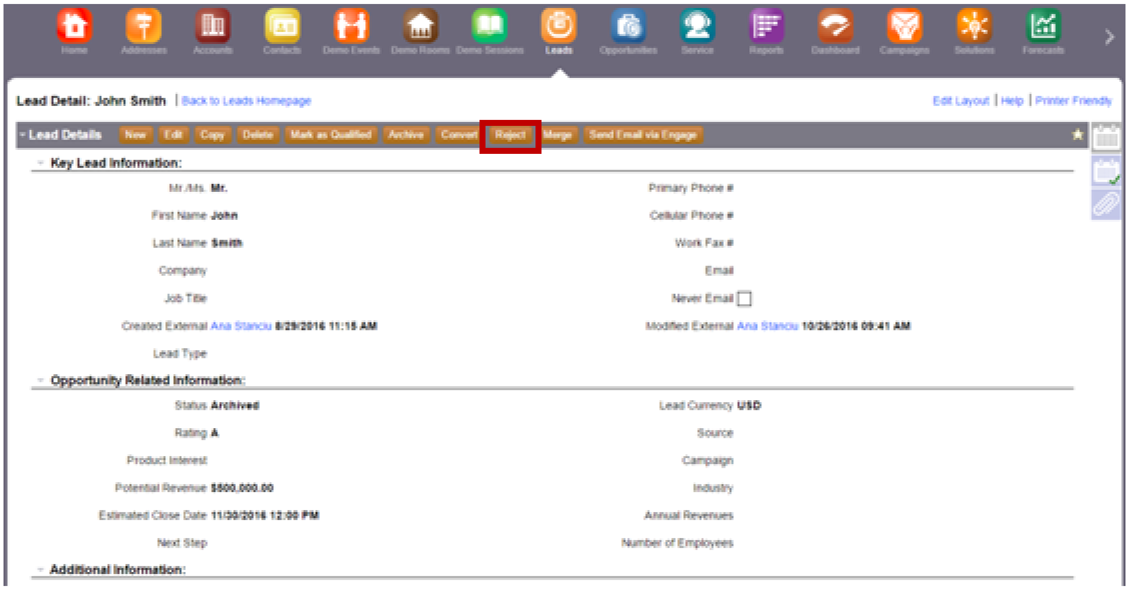
Starting with Release 34, when a lead is rejected on the Reject a Lead page, and a cascading picklist is defined with the Status field as the parent picklist and the Reject Code field as the related picklist, the values for the Reject Code are restricted according to the cascading picklist definition.



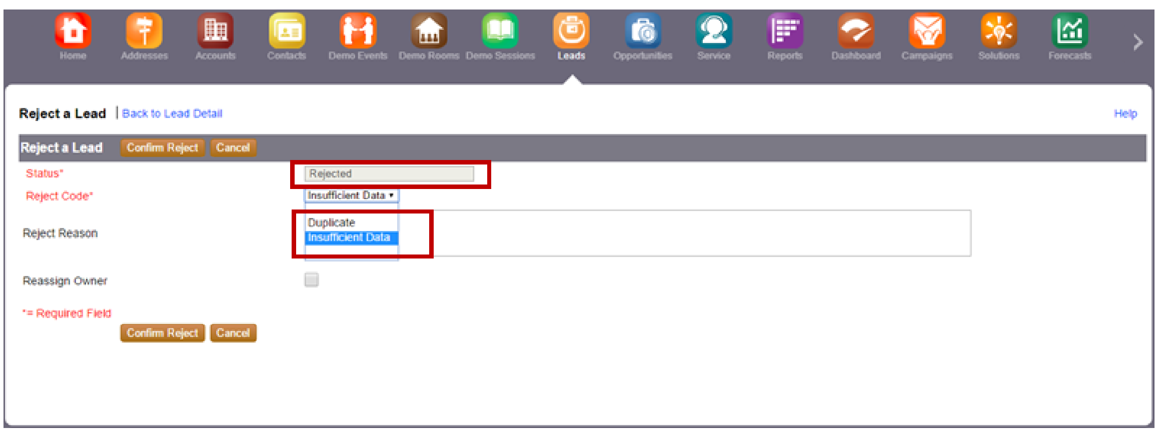
Defining a cascading picklist between Status and Reject Code picklists, Step 1



Defining a cascading picklist between Status and Reject Code picklists, Step 2



Rejecting a lead



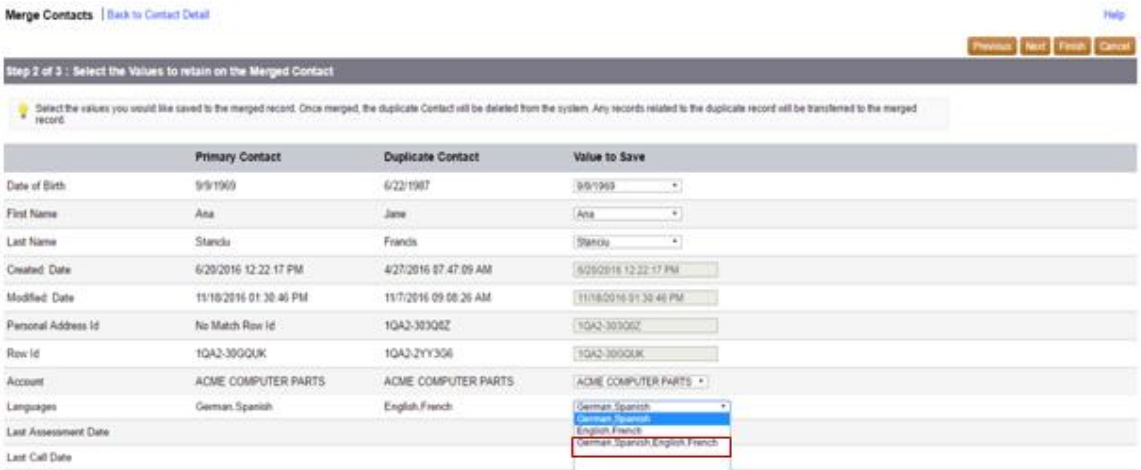
Reject Code picklist restricted set of values as per the cascading picklist definition

Locale Support for Slovakia & Romania

Starting with Release 34, Romania and Slovakia locales are supported in Oracle CRM On Demand. With the new locale support, customers can use Romania and Slovakia-specific date and time formats. These newly introduced locales will be supported in Reports and Dashboards as well.

Option to Keep Multi-Select Picklist Value from Both Records in a Merge

Starting with Release 34, when merging two records, a new option that contains values from both the primary and the duplicate record is available in the Value to Save field. This allows you to keep the values from the multiselect picklists from both the primary record and the duplicate record, in the final record.



New option containing values from both primary and duplicate record available in 'Value to Save' field

Provide Options to Change Default Search Criteria for Lookup Windows

This feature allows company administrators to configure the default search field in lookup windows. The new "First Targeted Search Field as Default Search in Lookups" setting is available in Search Layouts of all record types. If the setting is selected, the first field in Targeted Search field of the layout will be displayed as the default search field in the lookup window.

STEPS TO ENABLE

1. In Oracle CRM On Demand, click Admin, and then click Application Customization.
2. To create or edit custom search layouts, select any record type and click the Search Layout link for the record type.
3. In Step 3 of Search Layout wizard, select the First Targeted Search Field as Default Search in Lookups check box to enable the feature

Validation of Percentage Split Field of Opportunity Team in All Input Channels

Prior to Release 34, validation of the Percentage Split field in the Opportunity Team record type was done only in the UI/Java layer. In Release 34, validation of the Percentage Split field has been moved to the OM layer so that the validations trigger for all channels, such as UI, Import, REST and Web services.

The field is validated on the following aspects:

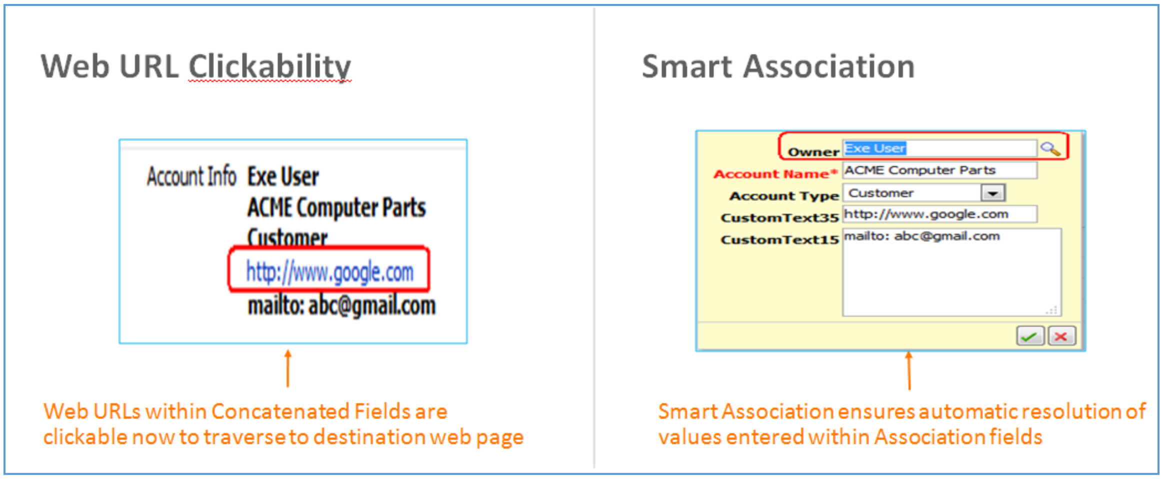
- Incorrect value (non-numeric values are not accepted)
- Value greater than 100 (must be between 0 and 100)

Web URL Clickability and Smart Association in Concatenated Fields

Prior to Release 34, Web links within a concatenated field were shown only as text, and Smart Associations were not enabled for association fields within concatenated fields.

In Release 34, the ability to click on Web links from within a concatenated field and open the related Web URL has been added. Note that this feature works only when the Convert URL Text Values to Links option is selected on the Company Profile page.

In Release 34, Smart Associations are enabled for association fields within Concatenated fields – that is, when the user enters a value in the text box, that value will be automatically resolved and associated to a record that exists in the drop-down menu values, if there is a match.



STEPS TO ENABLE

1. In Oracle CRM On Demand, click Admin, then click Company Administration, and then click Company Profile.
2. Select the Convert URL Text Values to Links check box.
3. Save the profile changes.

This setup step is required only for the Web URL clickability function.

Web Services

Activity Exposed as Child of Service Request Web Services 2.0

Starting with Release 34, Service Request Web services 2.0 supports Activity as a child of Service Request. For more information, please refer to the *Oracle Web Services On Demand Guide for Release 34*.

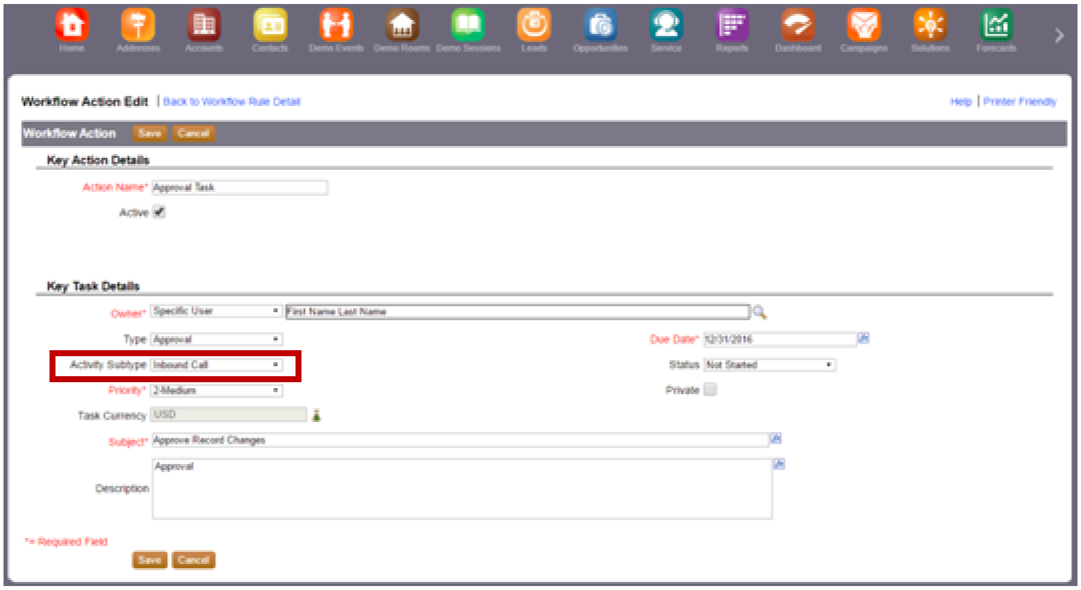
Administrative Web Services to Manage Process Administration

A new Administrative Web service named Process Administration is now available with methods to Read and Upsert process administration information. Using this Web service, you can access and update process administration configurations and their child information. However, this Web service does not expose field setup and related access control configuration data for transition states. For more information, please refer to the *Oracle Web Services On Demand Guide for Release 34*.

Workflows

Add ‘Activity Subtype’ to Create Task Workflow Action

This feature exposes the Activity Subtype field in workflow Create Task actions. This field is an editable picklist. It is not required and it does not have a default value. Company administrators can modify existing Create Task actions in workflows or create new Create Task actions and select a value for the Activity Subtype.



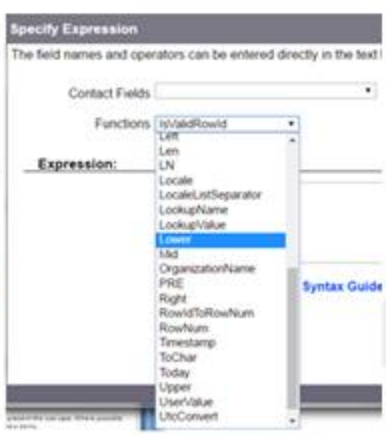
Create Task Action page

Add IsValidRowId, Lower and Upper Functions in Expression Builder

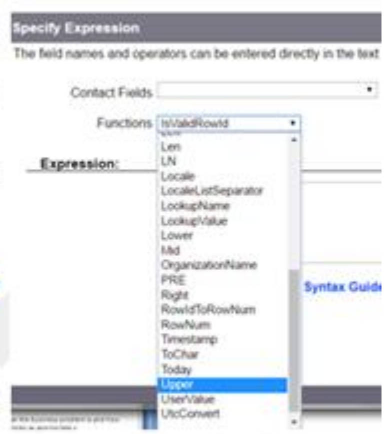
In Release 34, three new functions have been introduced in Expression Builder, which is available in Field Management, Workflows Rules and Actions, and Process Administration:

- The IsValidRowId function queries a specified object and returns TRUE value if the specified RowId exists and FALSE if the RowId does not exist
- The Lower function converts all letters in a specified string to lowercase
- The Upper function converts all letters in a specified string to uppercase

IsValidRowId



Lower



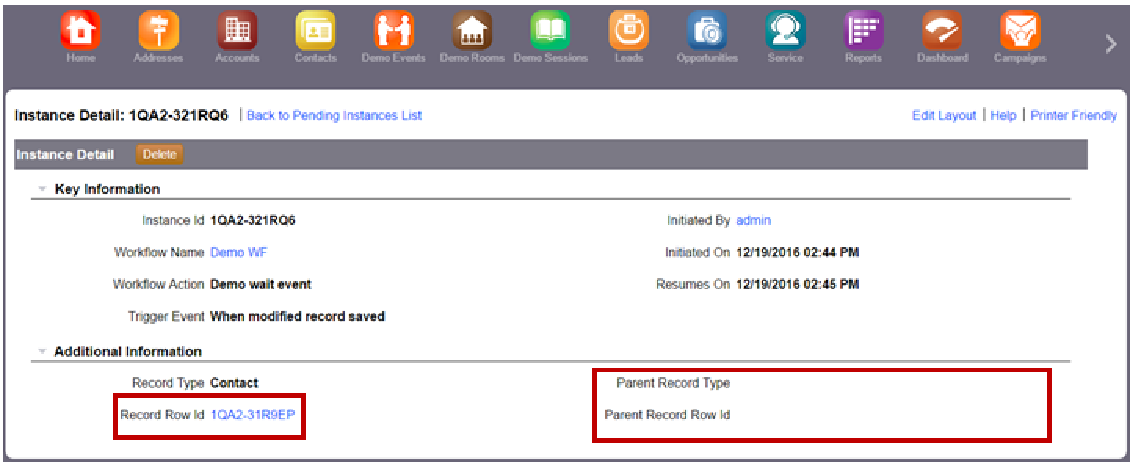
Upper

Add Record RowId in Workflow Wait Monitor

From the Workflow Wait Monitor, users can view the details of the pending instances of Wait actions and details of the workflow actions. For example, if an instance of a workflow Wait action is pending for longer than they expect, then the users can use the Workflow Wait Monitor to investigate the instance, find details of the record that triggered the Wait action, and look at the configuration of the workflow action. If necessary, they can delete the instance. In

Release 34, the instance view was enhanced by the addition of three more fields related to the record that triggered the Wait action:

- Record Row Id
- Parent Record Type
- Parent Record Row Id



Pending Instance Detail view of Wait actions

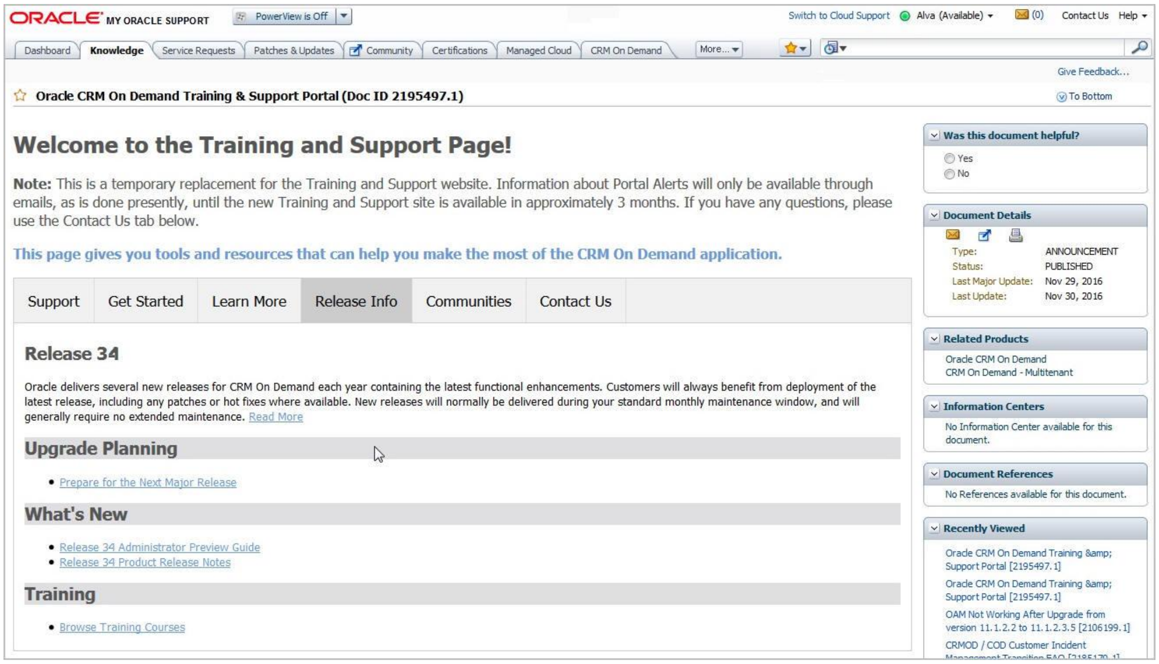
Extend Logging for Expression Related Errors in Workflow Error Monitor

Starting with Release 34, some workflow-related errors that were previously seen only in log files are now logged in the Workflow Error Monitor. Examples of such errors are:

- Errors due to syntax errors not being detected by Expression Builder, for example, [{Name}]=TRUE
- Errors due to renaming of custom fields after they had been used in workflow rule or actions expressions
- Assigning invalid values for picklists in Update Values actions

Training and Support Center

The Training and Support Center portal makes it easy for you to pinpoint the training resources and support that you need, depending on your job role, your level of expertise with the product, and the phase of using Oracle CRM On Demand.



Training and Support Center – Release Info tab

The **Support** tab provides alerts and notifications specific to your application environment.

The **Get Started** tab lists resources based on your specific role together with resources aimed at helping you get the most out of your first 30 days with Oracle CRM On Demand.

The **Learn More** tab outlines information in key topic areas, such as administration, integration, and reports. Go to this tab to get the resources you need to move beyond the basics.

The **Release Info** tab contains information specific to the current and upcoming releases of Oracle CRM On Demand. Access this tab to prepare for upgrades to your Oracle CRM On Demand application.

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

Search

Use the Search box to find resources across the entire Training and Support Center based on keywords or Doc IDs. For example, searching on Analytics will capture instructor-led training (for example, the Advanced Analytics Workshop), Webinars, FAQs, and best practices for optimizing analytics performance.

Access

To access the portal, click the Training and Support link in the upper right of any page in Oracle CRM On Demand.

Additional Resources

Before you begin setting up the new Oracle CRM On Demand Release 34 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:

http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.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 34 questions or issues.

Please use one of the following toll-free numbers based on your location:

- United States & Canada
  - Toll Free: 866-853-8521
  - Toll: 512-501-7113
- Australia: 0011-800-08538521
- China: 10800.130.1178
- China Alternate: 86.800.810.0366
- Belgium: 0800-7-5630
- France: 00-800-08538521
- Germany: 00-800-08538521
- Hong Kong: 001-800-08538521
- India: 000-800-100-1148
- Indonesia: 001-803-1-002-0896
- Italy: 00-800-08538521
- Japan: 010-800-08538521
- Korea: 00798-1-1-002-0896
- Luxemburg: 800-2-6576
- Malaysia: 1-800-81-3753
- Mexico: 001-866-678-9037

» Netherlands: 0800-022-6451
» New Zealand: 0800-447171
» Pakistan: 00-800-01-001-866-435-7705
» Philippines: 1800-1-111-0178
» Spain: 00-800-08538521
» Singapore: 001-800-08538521
» Taiwan: 00801-10-4139
» Thailand: 001-800-11-002-0896
» Sri Lanka Colombo: 2-430-430-866-435-7705
» Sri Lanka (outside Colombo): 112-430-430-866-435-7705
» United Kingdom: 00-800-08538521
» Vietnam: 1-201-0288-866-435-7705

Important Dialing Instructions

All numbers listed above for countries outside of the United States & Canada are UIFN (Universal International Freephone Numbers). Please dial all numbers exactly as listed. These numbers are Freephone and subsequently will not cause any charges to our customers.

Oracle Corporation, World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065, USA

Worldwide Inquiries
Phone: +1.650.506.7000
Fax: +1.650.506.7200

CONNECT WITH US

blogs.oracle.com/oracle

facebook.com/oracle

twitter.com/oracle

oracle.com

Integrated Cloud Applications & Platform Services