

# ORACLE CRM ON DEMAND CUSTOMIZATION AND INTEGRATION



At Oracle, we know that no two businesses are exactly alike. That is why Oracle CRM On Demand provides you with powerful and flexible tools to extend your CRM so that it is tailored to support your organization's specific business processes.

## THE WORLD'S MOST COMPREHENSIVE CRM ON DEMAND SOLUTION

- Easy to use for high user adoption
- Deploys quickly with little IT investment
- Embedded marketing, sales and service best practices
- Powerful and easy to use real-time and historical analytics
- Works online or offline

## Customize for Your Unique Business Requirements

Oracle CRM On Demand enables customization at all levels of the application – the user interface (UI) level, the business process level, and the data level. This customization flexibility combined with Oracle CRM On Demand's rich, prebuilt functionality and embedded best practices means you can deploy CRM that is a perfect fit for your business, without having to build it yourself from the ground up.

With Oracle CRM On Demand, you point and click to configure the application without touching the underlying code, so you do not need a lot of training to get started. Customizations and extensions will not break in upgrades, eliminating the time and expense of potential rework. And for companies that do not want to go it alone, Oracle CRM On Demand's certified consultants can help.

## Personalize the User Interface to Drive High User Adoption

Oracle CRM On Demand lets users personalize the application to tailor it to the way they use it. Homepages and lists may be customized to display only sales data that is pertinent to a sales representative. Analytics reports may be customized to the way an executive measures business performance. Tabs can be re-named, re-ordered, and hidden to suit user needs. In addition, configurable search tools enable users to fine tune the search interface to produce highly relevant search results.

UI customization also includes dynamic layouts, which enable organizations to configure different layouts for different kinds of records. Dynamic layouts reduce clutter and present end users with only the information they need, based on record type, to be

productive. These and other UI level customizations help make Oracle CRM On Demand a highly intuitive application that drives high user adoption.

## KEY FEATURES

### CUSTOMIZATION FEATURES

- Advanced field management
- Audit trail customization
- Cascading pick lists
- Custom analytics reports
- Custom objects
- Custom web content
- Dynamic layouts
- Host custom extensions on CRM On Demand servers
- Home page customization
- Search customization
- UI customization
- Workflow
- JS API for UI customization
- Push-based Page Layout Reset

### INTEGRATION FEATURES

- Integration events
- Web links
- Web applets and tabs
- Web services
- prebuilt integration
- Microsoft Office
- Microsoft Outlook Email
- Oracle E-Business Suite
- Oracle Marketing Cloud
- Oracle Social Network

Taking UI customization to the next level, the JavaScript API allows customers to create their own JS based integrations to CRM On Demands user interface using a standardized RESTful API. The API can be used to add or remove buttons, suppress existing buttons and even change the behavior of standard buttons.

## Extend Oracle CRM On Demand Through Data Level Customization

Customization does not stop at the UI. Oracle CRM On Demand provides custom fields and custom objects, so companies can model data not available in the out-of-the-box application. Custom data relationships may also be created, enabling organizations to relate custom objects to prebuilt objects or to other custom objects.

## Build Company-Specific Process Support


Oracle CRM On Demand's customization capabilities extend to the business process level, with features like time-based workflow, scripting, and advanced field management. Custom workflows can be used to trigger integration events, and custom analytics add deep insight. These flexible features enable you to support even the most unique, company-specific business processes.

## Extend Your Deployment Using Custom or Prebuilt integration

Oracle CRM On Demand provides the best of both worlds when it comes to integration. A comprehensive set of integration capabilities gives you the ability to build integrations and mashups between Oracle CRM On Demand and other applications. Moreover, prebuilt integrations enable you to streamline business processes that span application boundaries, while greatly shortening time to value.

## Custom Integration and Extensions Seamlessly Link Applications

Oracle CRM On Demand's integration capabilities, like its customization capabilities, span the UI, process, and data levels of the application. UI integration and extensions let you extend and embed external content and custom HTML to create mashups. At the



process level, integration events used in conjunction with workflow capabilities enable you to trigger cross-application processes automatically based on changes to information in Oracle CRM On Demand. Open, standards-based web services enable powerful integration at the data level, while adhering to business rules. Support for open standards means that companies can integrate to Oracle CRM On Demand using the tools of their choice, which keeps training costs and the overall costs of integration low.

## Prebuilt Integrations Speeds Time to Value

Oracle CRM On Demand's prebuilt integrations span both desktop and back-office applications. Seamless integration with familiar desktop applications like Microsoft Outlook, Microsoft Office, and IBM Lotus Notes improve user productivity. Bidirectional data synchronization, UI, and business process level integration between Oracle CRM On Demand and Oracle E-Business Suite streamlines the opportunity to quote/order process and provides a true 360-degree view of the customer. This prebuilt integration solution leverages Oracle's Applications Integration Architecture, powered by Fusion Middleware, to help you gain greater business agility using the applications you have today. In addition, pre-built integrations are available to connect Oracle CRM On Demand with Oracle Social Network and Oracle Marketing Cloud for an integrated customer experience.

## Host your content in CRM On Demand

Client Side Extensions (CSE) provides you the opportunity to create and host custom extensions on the CRM On Demand servers, rather than a server in your own infrastructure. Whether a flash file to show a graphical hierarchy, JavaScript to call web services and update other records or simple HTML, hosting extensions through CRM On Demand eliminates the costs of hosting it yourself. In addition, your extensions can now leverage the high security, incredible performance, and robust infrastructure of Oracle's Data Center.

Extensions are created by uploading JS, HTML, JPG, GIF, SWF, or CSS files from the CRM On Demand Application Administration screens. Once uploaded, the extension will be referenced by an automatically generated, unique URL in any custom web applet, custom web tab or global web applet with no additional configuration steps. Simply configure these applets the way you always have, but provide the generated URL instead. Hosting your extensions in CRM On Demand will provide better performance and eliminate the costs of hosting it yourself.

## Bottom Line





By leveraging advanced customization and integration capabilities to ensure your CRM is tailored to your specific requirements, Oracle CRM On Demand extends the reach and impact of CRM, and maximizes your return on investment.



### CONTACT US

For more information about Oracle CRM On Demand, visit [oracle.com](http://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.

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