ORACLE CRM ON DEMAND
RELEASE 28

Get smarter, more productive and gain the best value with Oracle CRM On Demand Release 28. Oracle CRM On Demand continues to be the most complete Software-as-a-Service (SaaS) CRM solution available. Now, with Release 28, organizations of all types and sizes benefit from actionable insight anywhere, anytime, as well as key enhancements in mobility, embedded social, ease of use, analytics, and integration and extensibility.

Next Generation Mobile and Desktop Solutions
Oracle CRM On Demand Release 28 offers a complete set of mobile and desktop solutions that improve productivity by enabling reps to access and update information anywhere, anytime.

Capabilities include:

- **Oracle CRM On Demand Connected Mobile Sales.** This add-on mobile service provides a configurable mobile solution on Android, iOS, and BlackBerry devices. You can access data from CRM On Demand in real time with a rich, native user experience that is comfortable and familiar to current mobile users and fully configurable to capture your unique processes. New features include calendar and contact synchronization for iOS devices by supporting the CalDAV and CardDAV standards to allow appointments and contacts to be viewed, created, updated and deleted right from your native iOS calendar and contact apps. This means changes made within the iOS device calendar and contact apps will now reflect in CRM On Demand and vice versa. Icons have been updated to follow the modern UI theme as in our browser version of CRM On Demand.
**BENEFITS**

- Leverage anytime, anywhere access to CRM via mobile and desktop solutions
- Increase performance and operational transparency
- Improve customer service with new channels
- Maximize productivity, satisfaction, and user adoption (ROI)
- Maximize data security
- Gain immediate advantage with industry-ready solutions
- Achieve the lowest Total Cost of Ownership (TCO) and highest Business Agility

*Figure 1 Oracle CRM On Demand Connected Mobile Sales*

- **Oracle CRM On Demand Disconnected Mobile Sales (DMS)** – A disconnected CRM solution for the iPad platform, DMS has added more options for eDetailing including the ability to track and report on what aspects of a presentation have been delivered so that next time a rep visits a physician, they will know precisely what has been presented and what hasn’t – down to the individual page level. In addition, to ensure procedural compliance, more options are available to report on how much of a presentation was provided to the physician. For sales representatives that travel across time zones, a unique feature has been added that will allow them to perform a call submission based on the time zone the call was in instead of the time zone the representative is in. This enhancement ensures that call submission processes are followed while allowing representatives to provide an update while the information is still fresh in their mind.
• **Oracle CRM On Demand Desktop:** This application centralizes essential CRM information in the familiar Microsoft Outlook environment, increasing user adoption and decreasing training costs. Users can manage CRM data while disconnected, and then synchronize bi-directionally when they are back on the network. With Oracle CRM On Demand Desktop Version 4.1, a free version called CRM Desktop Lite is included. It allows you to synchronize Contacts, Activities and email with Microsoft Outlook.

![Oracle CRM On Demand Desktop](image)

• **iCalendar,** a standard format to share calendar entries with others, is supported in Oracle CRM on Demand. Users can save iCalendar files for oracle CRM On Demand appointments from the daily, weekly, or monthly calendar view or from the appointment detail page. This file can be imported into other applications that supports iCalendar format such as Microsoft Outlook. The appointment’s Subject, Location, Description, List of users and contacts, Start time, end time and the list of attachments is included in the iCalendar file.

• **vCard,** a standard format for electronic business cards, is supported in Oracle CRM on Demand to allow users to save Oracle CRM On Demand Contacts as vCard files from the Contact Detail page or import external Contacts via vCard into Oracle CRM On Demand.

• **Mobile Browser Support:** Apple iPhone, Apple iPad, Windows 8 Tablets, and Google Android.

**Get more Productive with Modern User Interface**

Oracle CRM On Demand continues to invest in improving User Interface to enhance user experience whether accessed on tablets or on desktops. In Release 27, we added a Global Header to provide users with quick access to applets and icons, updated the Calendar to have a modern look and introduced a Map page for users to find an address on a map. Release 28 expanded on those improvements as well as made
additional enhancements in several other areas.

Several features have been added to enhance the Calendar.

- Appointments can now be intuitively created and deleted by directly clicking within the Calendar area.
- Multi-day appointments are displayed in the Monthly Calendar giving a much clearer view when making longer term plans and appointments.
- A new visual indicator has been added that shows Appointments that have scrolled off the screen, ensuring that later appointments are not missed.
- The Group calendar was substantially enhanced as well making it easier to navigate and cleaner to use with day/week/month navigation, a quick link for “Today”, and a simple toggle between the personal and group calendar.

In Release 27 we introduced Maps functionality, and have continued to enhance it in Release 28. With proximity search for Appointments, Oracle CRM On Demand checks the addresses stored in the Address fields on the Activity record and places a pin on the map if the addresses are within the radius that you specify for the search. The ability to obtain directions was also introduced in Release 28; enter multiple destinations, add additional stop points, and get a detailed set of turn-by-turn directions for the days’ travel.

When users work off of lists, users need to switch back and forth between viewing the details of the record and viewing the list of records. Also, when going back to the list of records, the user needs to remember the position of the record on the list and potentially scroll back to that position. To provide a better user experience when users are updating records based off of a list, a Toggle View Pane icon is introduced on the list pages list pages near the favorites icon.
Get Smarter with Actionable Insight

The difference between making good decisions and great decisions depends heavily upon the quality, structure, and availability of information at hand. Oracle CRM On Demand Release 28 expands upon its industry-leading analytics capabilities to provide greater business insight than ever before. New capabilities include the addition of real-time analytics support for Custom Objects 16 to 20 within Advanced Custom Objects and real-time reporting capability on the many to many relationships of Accounts and Contacts. Other enhancements include enabling Principal Partner Account analysis with Account History, reporting on Households associated Portfolios, Portfolio relationships analysis within Advanced Custom Objects and Vehicle metrics analysis by Account dimension.

Leverage Social Media

Engaging customers through social media channels is rapidly becoming a significant key to enhanced customer experience as it provides proactive customer service, targeted messaging, and greater intimacy throughout the entire customer lifecycle. Listening to customers on the social media channels can identify a customers’ sphere of influence, and reveal the real value they bring to their organization, or the impact they can have on growing your business.

Engaging customers through social media channels equates to meeting them on their terms, where they feel empowered and is the first step toward developing brand loyalty, virally expanding customer engagements, thus increasing revenue.

Your social media strategy extends business capabilities internally as new socially enabled tools make their way into everyday business processes – extending collaboration and communication between employees. Oracle CRM On Demand is leveraging Oracle’s Social Relationship Management suite providing integration with Oracle Social Engagement and Monitoring, Oracle Social Marketing, and Oracle Social Network. With Oracle CRM On Demand you have the power to engage with your customers directly through social media channels, identify potential negative influencers, create service request from social posts, so your service team can follow-up in real-time; or have social campaign leads automatically entered into Oracle CRM On Demand streamlining the lead qualification process.

Using the integrated Oracle Social Network, your Oracle CRM On Demand users can collaborate with your entire organization maintaining a full history of interactions for processes such as Approvals, Agreement Negotiation, Discounting and more.
Get the Best Value

Oracle CRM On Demand delivers unprecedented value with the broadest set of capabilities from a single-provider solution, the industry’s lowest total cost of ownership, the most on-demand deployment options, the deepest CRM expertise and experience of any CRM provider, and the most secure CRM in the cloud. With Release 28, Oracle CRM On Demand now includes even more enterprise-grade security, integration, and extensibility features, along with enhanced industry editions to save you time and money.

New features include:

- **Custom tooltips on fields** can now be included for custom help, guidance or just providing some more information about the field. Any field with a tooltip configured is denoted with a dotted underline. On mobile devices, a touch and hold will display the tooltip.

- **Import Account Contact** allows users to import Account Contacts into CRM On Demand via Data Import Assistant and Oracle Data Loader on Demand. By importing Account Contact, users can create an association of an existing Contact with an existing Account in CRM On Demand.

- **Expanded Integration**: CRM On demand continues to improve Web Services each release. Custom web link fields are exposed allowing users to read web link information via web services version 2.0. We also have added more object coverage enabling customers and partners to easily integrate with CRM On Demand. Examples of Web Services enhancements in Release 28 include adding several child objects of Custom Objects 1, 2 and 3 – specifically Account, Contact, Asset, Note, Activity, Portfolio and Opportunity. We continue to expand RESTful API support. For example, a data only option has been added for GET requests that can be used to retrieve only field names and values allowing for quick retrieval of information. Also, authentication APIs have been added so that sessions can now be established with REST APIs and used with the UI making UI extensibility more powerful. The new authentication API also supports SSO.

- **Sample code for Oracle Marketing Cloud** will be published on Oracle Technology Network to demonstrate how to use Oracle CRM On Demand’s Web Services and Oracle Marketing Cloud’s Bulk APIs to create an integration to push data from Oracle CRM On Demand to Oracle Marketing Cloud’s custom objects. This provides the ability to extend the integration with Oracle Marketing Cloud by populating Oracle Marketing Cloud’s custom objects with any of your Oracle CRM On Demand data to allow for more defined data segmentation and campaigns.

- **Idle alert for User Session Timeout** allows administrators to configure an idle alert, which would notify the end users if their session is about to time out due to inactivity.

- **Custom icon for custom web applets** enables administrators to define what
icons to display for custom web applets instead of displaying generic icon.

Bottom Line
Oracle CRM On Demand Release 28 enables organizations to get smarter, get more productive, and get the best value, period. For more information on Oracle CRM On Demand Release 28, please visit oracle.com/crmondemand or call +1.866.906.7878 to speak to an Oracle representative.