ORACLE CRM ON DEMAND DESKTOP

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CRM ON DEMAND

Oracle CRM On Demand Desktop increases CRM user adoption and maximizes sales productivity by providing CRM capabilities directly within Microsoft Outlook. With features such as seamless Microsoft Outlook integration, unified data, mobility, and customizability, Oracle CRM On Demand Desktop provides sales professionals access to essential CRM data, right at their fingertips.

CRM On Demand Desktop also provides a freely licensed version called CRM On Demand Desktop Lite that allows you to synchronize your Contacts and Activities with Microsoft Outlook.

Increase CRM User Adoption

Oracle CRM On Demand Desktop delivers CRM functionality where and how most sales professionals like to work – from within Microsoft Outlook. All emails, calendar events, and tasks can be linked to the right Contact, Account, Lead, or Opportunity in Oracle CRM On Demand. When sending a meeting invite or an email, a single click captures the action and quietly updates Oracle CRM On Demand in the background with no extra work required.

 Oracle CRM On Demand Desktop extends the forms, menus, folders, and toolbars of Microsoft Outlook, to display rich CRM data. You can use smart UI capabilities such as type-ahead filtering and auto-suggestion, or standard Microsoft Outlook personalization such as conditional formatting, thereby jointly delivering a powerful tool to increase your productivity. The familiar Microsoft Outlook UI look and feel means Oracle CRM On Demand Desktop requires minimal user training.

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

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- Seamless Microsoft Outlook integration using familiar user interface

- Automatic two-way synchronization of data between Oracle CRM On Demand and Microsoft Outlook: Accounts, Contacts, Leads, Opportunities, Email, Calendar and Tasks

- Full-featured offline access

- Powerful customizations to add new objects and fields, modify UI layout and business rules for validation

- Web Mashups extend functionality into Outlook

- Online-lookup and Record pinning to synchronize data from CRM On Demand

- Synchronize by owned records or Books of Business

- Single Sign On

BENIFITS

- Increase CRM user adoption
- Increase sales productivity
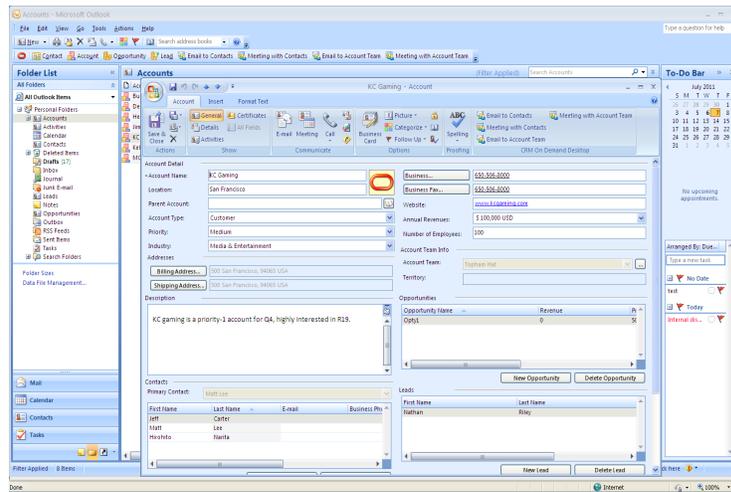- Minimize training
- Reduce data costs

Figure 1: Oracle CRM On Demand Desktop delivers CRM functionality from within Microsoft Outlook; this image shows an Account with its associated Oracle CRM On Demand Opportunities, Leads, Contacts, and other information. Creating an email and calendar invite automatically associates it with the Account, the transaction is captured, and Oracle CRM On Demand is updated through background synchronization.

Easy Access to Essential CRM functionality

Organizations require sales representatives to capture a lot of information about what they spend their time on to keep the entire team informed. Examples include:

- Interactions between themselves and a customer or prospect, including notes and comments,

- Regular updates to Opportunities,

- Creating new Contact records to identify key players in the Account or Opportunity, and

- Keeping all contact information (phone, address, email, etc.) up to date.

That is a lot of data to keep accurate in one system, let alone two. Oracle CRM On Demand Desktop provides powerful filtering capabilities that only synchronize the most critical data from Oracle CRM On Demand, such as high priority accounts or opportunities closing this quarter, instead of the entire data set in Oracle CRM On Demand.

Oracle CRM On Demand Desktop further delivers key CRM functionality into Microsoft Outlook and extends the natural actions that sales representatives take. With a single click, you can schedule a meeting or send an email, record the interaction, and update Oracle CRM On Demand. Keeping the Address Book updated in Microsoft Outlook is second nature to most people; that modified or new record is reflected in Oracle CRM On Demand with no additional steps needed. CRM made simple.

Unify Data

For a sales representative, being able to find the information they need easily is extremely important. Partial data or moving through multiple screens is not good enough. Oracle CRM On Demand Desktop leverages the Microsoft Outlook native UI interface to display a full set of relevant data in one single view. For example, view emails, appointments, contacts, and tasks associated with an Opportunity all on a single page. See all you need, all at once.

Online Lookup

Occasionally, sales representatives need to get access to a record that they haven't synchronized into Microsoft Outlook. With online lookup, if the sales representative is on the network, they can retrieve a record from CRM On Demand without having to synchronize the record first. Online Lookup allows sales representatives to synchronize targeted records instead of an entire set of similar records, saving time.

Record Pinning

Combined with Online Lookup, Record Pinning allows a sales representative to take the record they have found in CRM On Demand and include it in their synchronization even if the record doesn't match the filters. Record Pinning is also useful for continuing to synchronize those records that fall outside of the filters based on a change, such as closed opportunities.

Web Mashups

Getting the full view of a record often means accessing information from multiple sources. CRM On Demand Desktop includes Web Mashups on the detail pages for records, allowing integration with Google Maps, LinkedIn Profiles or Twitter feeds for that record – providing a single source of information.

Automatic or Manual Two-Way Synchronization

Oracle CRM On Demand Desktop's two-way data synchronization allows sales professionals to have a constantly updated and accurate 360-degree view of CRM data changes. It is easy to stay in sync as well - simply initiate synchronization at any time, or just schedule it to occur at certain time intervals. Every change made in each system is synchronized, with full field-level conflict resolution – just to be safe. No more outdated or mismatched records. Stay in the know, stay in the now.

Offline Access

For the mobile sales professional of today, who is always on the move, and sometimes without a stable internet connection, Oracle CRM On Demand Desktop supports a seamless transition between online and offline modes of operation. Continue to use the full functionality of the product in an offline mode, and simply synchronize to the server once the internet connection becomes active. Stay focused on keeping your sales data current and accurate, with no worries of missing updates or having to remember to provide one. There for you when you need it.

Customizability

Make CRM work for you the way you like it. Feel something is missing from the standard view presented, or want to rearrange how the page looks? No problem! Oracle CRM On Demand Desktop provides an impressive array of customizable objects, fields, and UI layout options. For example, you can add Service Requests, Campaigns or other objects that you heavily rely on. In addition, Oracle CRM On Demand Desktop provides customizable validation logic, including required fields, read only fields, and business rules. For example, you can ensure that the opportunity close date has not passed for any open opportunity, thereby maintaining high quality data. Personalize your client to help make the data-flow familiar and efficient. Make it right for you.

CRM Desktop Lite

CRM On Demand Desktop also includes a freely licensed version called CRM On Demand Desktop Lite that allows you to synchronize Contacts and Activities with Microsoft Outlook. You can have a mix of users with some users on the paid version of CRM On Demand Desktop and some on free CRM On Demand Desktop Lite. System requirements are the same for both versions of CRM On Demand Desktop.

Bottom Line

Oracle CRM On Demand Desktop enables sales professionals to manage their data in Microsoft Outlook, maintain a 360-degree view of CRM data through synchronization, seamlessly transition from the office to on the move, and vastly improve sales force productivity.

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Integrated Cloud Applications & Platform Services

Oracle is committed to developing practices and products that help protect the environment