

Siebel CRM Server Sync for Microsoft Exchange Server



Oracle's Siebel Server Sync for Microsoft Exchange Server enables employees to easily share customer information between Microsoft Outlook and Siebel applications. Whether employees use Microsoft Outlook or Siebel to manage their calendars, address books, and tasks, data is seamlessly integrated. Siebel Server Sync for Microsoft Exchange Server increases end user productivity, adoption, and collaboration, helping companies transform themselves into customer-driven enterprises.

KEY FEATURES

- Seamless integration between Microsoft Exchange Server and Siebel Server that doesn't require user intervention
- View CRM contacts, calendar, and tasks in Exchange
- Associate CRM account, opportunities, and contacts to Outlook tasks and appointments

KEY BENEFITS

- Make informed decisions with a more complete view of all customer communications
- Improve user adoption by extending CRM to Microsoft Outlook and mobile devices

Increase User Adoption through Microsoft Exchange Synchronization

Companies in every industry are in fiercely competitive races to be their customers' trusted source for products and services. Every corporation is pursuing strategies, processes, and technologies to improve customer relationship management (CRM). But the devil is in the details. Every interaction adds to the health of your relationship with your customer.

Employees need tools that everyone can use and understand, ones that are familiar and comfortable. Managers need data from the front line for analyzing trends, patterns, and preferences. They need to understand what is working to improve customer satisfaction, sales, and productivity.

Microsoft desktop productivity solutions are on nearly every desktop around the world. Enabling employees to work seamlessly between desktop productivity applications and Oracle's Siebel applications plays a vital role in end-user acceptance of a CRM solution. With integration of these products, employees can focus on customers and building relationships and not on updating the CRM system.

Achieve Higher Productivity with Seamless Microsoft Integration

Siebel Server Sync for Microsoft Exchange Server shares customer information between Microsoft Outlook and Siebel applications. This advanced integration extends the ability of Siebel applications to become the true repository for all customer-related information.

Siebel Server Sync for Microsoft Exchange Server overcomes the challenge of making the CRM system transparent to front-line sales, service, and marketing employees. Keeping the CRM system up-to-date becomes part of a user's daily tasks and can be done within Microsoft Outlook.

This extensive integration includes:

- A server-based synchronization engine that synchronizes calendar, contacts, and tasks between Siebel applications and Microsoft Exchange Server—this is done in the background without requiring active user intervention
- A Microsoft Outlook add-in that allows users to link Microsoft Outlook contacts, tasks, and appointments to Siebel data such as opportunities and service requests—speeding and simplifying the process of tracking every customer interaction
- Siebel Server Sync for Microsoft Exchange Server extends the benefits of desktop productivity applications into a value-added activity that improves the customer experience and drives user adoption of CRM systems.

Synchronize in the Background

Siebel Server Sync for Microsoft Exchange Server enables near-real-time, bidirectional synchronization of calendar appointments, contacts, and task items between the CRM database and Microsoft Exchange Servers. This occurs in the background—eliminating the need for employees to remember special steps for synchronizing the applications.

Users can schedule appointments through Siebel applications, and the meetings are visible in all participants' Microsoft Exchange calendars. When users propose or change meeting, these actions are automatically reflected in the Siebel application.

Drive User Adoption while Reducing Cost of Ownership

Siebel server-based synchronization drives user adoption, as users can continue to use the productivity tools they already use while maintaining current data in the Siebel CRM system. Whether the user maintains a calendar or contact data in Microsoft Outlook, Outlook Web Access, or even on a third-party mobile device that is already sharing data with Microsoft Exchange, data is shared with the CRM application. The seamless integration between Siebel CRM applications and Microsoft Outlook will significantly lower training costs and increase user adoption.

The engine also supports a lower total cost of ownership driven by consolidating functionality into server components, centralizing administration, and eliminating client-based configuration. The seamless integration reduces maintenance overhead and improves operational efficiency.

The Siebel server-based synchronization engine consists of two major components:

- A dispatcher server component to optimally dispatch sync requests
- An extraction server component to synchronize data between the Siebel CRM and Microsoft Exchange Server databases

All components run only on the Microsoft Windows platform. Administrators do not need to install any components on their Microsoft Exchange Servers. The Siebel server-based synchronization engine supports Microsoft Exchange 2010 and 2013 using Exchange Web Services.

Linking with the Siebel Microsoft Outlook Add-In

Siebel Server Sync for Microsoft Exchange Server comes with an add-in that allows users to use Microsoft Outlook to link calendar appointments, contacts, and task items to Siebel applications. For example, users can create calendar appointments in Microsoft Outlook and link those appointments to the relevant opportunity that they have created in the Siebel Sales application without leaving Outlook. Once users associate Siebel links with a Microsoft Outlook record, they can use these links to navigate directly from the Microsoft Outlook client into the appropriate Siebel application.



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