

# SIEBEL CRM MOBILITY



A critical component of any successful CRM implementation is the ability for users work when and where they want—from desktop browsers, to mobile devices, to third-party products like Microsoft Outlook or IBM Lotus Notes—whether or not they have connectivity to the enterprise CRM system.

This white paper discusses the various options available for mobility and provides guidance on how to select the correct solution for various usage scenarios.

## KEY FEATURES

- Varying degrees of functionality designed to meet specific user needs
- Flexibility to allow users to leverage the applications and devices they prefer

## KEY BENEFITS

- Increase user adoption
- Reduce user training
- Gain offline access to CRM data

## Overview of Products

Siebel (Disconnected) Mobile	Full-function Siebel CRM applications optimized for mobile devices, whether connected or disconnected
Siebel CRM Desktop	Subset of Siebel CRM functionality addressing the most common user tasks from within the Microsoft Outlook or IBM Lotus Notes client
Siebel Server Sync for Exchange (SSSE)	Synchronizes calendar, task, and contact data between Siebel CRM and Microsoft Exchange, which in turn allows propagation to Microsoft Outlook and popular mobile devices.
CalDAV / CardDAV	Exposes the Siebel Calendar and Contact lists to mobile device users with standards-compliant devices.

## Siebel (Disconnected) Mobile

Siebel Mobile is the most comprehensive solution for allowing end-users to access their CRM data anywhere, anytime, and on any device. It is intended for users who need access to the Siebel CRM application even when they do not have network connectivity to the enterprise application. It provides a process-driven application to suit the needs of a mobile worker and works in a connected or disconnected mode. The Siebel Mobile application is a hybrid or container mobile application using the Siebel Open UI Responsive Web Design framework along with the Oracle Mobile Application

Framework to provide access to native features of mobile devices. The Siebel Mobile application can be downloaded from Apple Apps store or Google Play depending on the platform. Oracle also provides the mobile project archive file which allows customers to use their own profile and publish it to their custom apps store, thereby giving better control on the deployment.

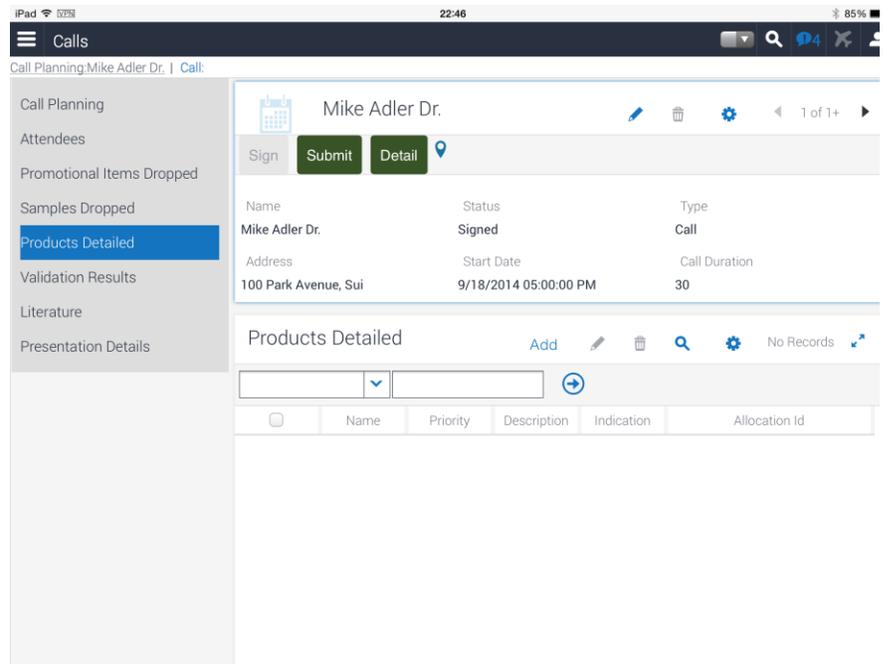


Figure 1: Siebel CRM Mobile application

### Typical Use Cases for Siebel (Disconnected) Mobile

We provide a number of Siebel Mobile Applications which are configured for disconnected use out-of-the-box, including Pharma Mobile, Field Service Mobile, and Sales Mobile.

Field Service Mobile and Sales Mobile can be used across multiple Industries covering sales or field service use cases. Customers need to download only one application (Siebel Mobile) from the Apps Store or Google play but depending on the backend configuration of the Siebel Server can use Field Service, Sales, or Pharma Mobile.

- Life Sciences: Pharmaceutical sales representatives armed with tablets who visit health care providers and wish to present multi-media product information and capture sample drops, even when they have no network connectivity.
- Field Services: Technicians who need to be able to select their next activity; get directions to customer sites; have access to customer, product, and asset information; and capture parts used, time, and expenses.
- Sales: Sales representatives who spend most of their time on the road meeting customers, who capture customer information before and after the meeting, allowing them to follow their leads and opportunities.

## Siebel CRM Desktop

Siebel CRM Desktop is designed for those users who rely on the popular Microsoft Outlook and IBM Lotus Notes applications for managing their customer interactions, but need to ensure that their customer data and interactions are captured in the CRM application.

Beyond simply synchronizing basic calendar, task, and contact data, Siebel CRM Desktop exposes CRM data and functionality directly within the host client.

Examples include (but are not limited to):

- When working with a calendar item, the user can associate it to a CRM account or opportunity as an activity, allowing sales team members and management to see customer touch points in the context of sales activity.
- When creating a calendar item, any invitee will automatically be added to the contact or employee list for the related CRM activity.
- Users may relate an inbound or outbound email to a particular customer account, sales opportunity, or any other syncing object. The user can also set up automatic associations of all inbound and outbound email for a given contact or customer account.

Siebel CRM Desktop provides CRM business logic, including availability of custom fields and enforcement of validation rules (required fields, pick lists, calculated fields, etc.) within the host application. Providing validation at the time of data entry ensures that users are notified immediately of any validation issues, which helps ensure they can address them quickly.

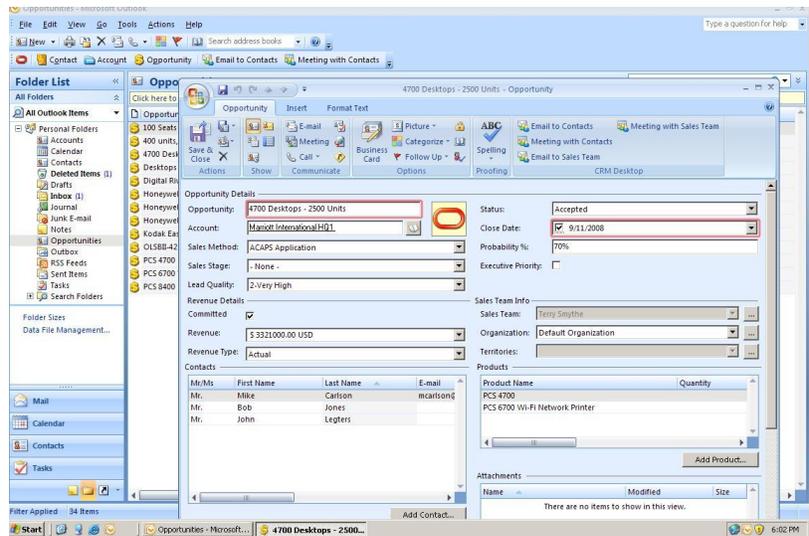


Figure 2: Maintain CRM Data in Microsoft Outlook

All functions available in Siebel CRM Desktop are available to users regardless of whether they are online or offline. Any changes made in their desktop productivity application are maintained regardless of whether there is immediate access to the CRM application. When users reconnect, any data updated on the client are uploaded to the server and vice versa. Any conflicts are reported to the user, who can determine the appropriate resolution.

Since users are already familiar with navigation, search, data entry, and other features of their desktop productivity application, organizations can allocate valuable training time on topics vital to the success of the CRM implementation, such as how individual opportunity status information feeds overall sales pipeline forecast through the back office to support and manufacturing.

It should be noted that Siebel CRM Desktop is intended to provide users with access to the CRM functionality they need every day, and is not intended to replace the entire CRM application. For example, a sales representative might need to update customer account and sales opportunity information on a daily basis and could do so within Outlook or Lotus notes using the CRM Desktop add-in, but for less frequent tasks—such as updating end-of-month forecasts or generating quotes or proposals—the user would return to the full Siebel CRM web-based client.

#### **Typical Use Cases for Siebel CRM Desktop**

- Sales representatives who currently manage their contacts, calendar, and tasks within Outlook or Notes and need basic access to view and make changes to a subset of their CRM data.
- Field service technicians who need to be able to have access to customer, product, and asset information, capture parts used, time, and expenses.

### **Siebel Server Sync for Exchange (SSSE)**

Siebel Server Sync for Exchange provides server-side integration between Siebel CRM and Microsoft Exchange for objects native to both applications—calendar, contact, and task. It is a lightweight solution, requiring no client-side installation or action by the end-user and no installation requirement on the Exchange server.

SSSE 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.

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 and vice versa. When users propose or change meetings, these actions are automatically reflected in the Siebel application.

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.

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 later using Exchange Web Services.

Siebel Server Sync for Microsoft Exchange Server comes with an optional 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.

#### **Typical Use Cases for Siebel Server Sync for Exchange (SSSE)**

- Sales or service representatives who currently manage their contacts, calendar, and tasks within Outlook or their mobile device and need only rare access to other CRM data.
- Users need near-real time, transparent server-side synchronization of data between Exchange and Siebel CRM.

### **CalDAV / CardDAV Integration**

CalDAV and CardDAV are industry standards allowing calendar and contact data (respectively) from a host server (in this case Siebel) to be presented to users for viewing on modification on a compliant client. For example, a user of an Apple iPhone device could subscribe to the Siebel Calendar and see appointments from the CRM application overlaid with other (such as their corporate or personal) calendars on the same device. Similarly, a user's Siebel contacts can appear as an additional address book on the mobile device.

It is important to understand that CalDAV/CardDAV integration introduces an *additional* calendar/address book on the client device, and as such does not provide synchronization between existing calendars and address books. For example, assume that a user were invited to a meeting by a customer and that invitation were to be received via the user's corporate Exchange server and the user accepted via the Outlook client. That meeting would be visible to the user on his or her mobile device calendar, but it would be on their corporate calendar, not their Siebel Calendar—the meeting would not be visible within the CRM application itself.

### Typical Use Cases for CalDAV / CardDAV

- Service users whose primary calendar is the Siebel Calendar and need to be able to see appointments on mobile devices
- Users who want to easy access to their CRM contacts on their mobile devices.



#### CONTACT US

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#### Hardware and Software, Engineered to Work Together

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