



# **Siebel Mobile Guide: Connected**

Siebel Innovation Pack 2013

Version 8.1/8.2

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## Index



# 1

## What's New in This Release

### What's New in Siebel Mobile Guide: Connected Version 8.1/8.2

Table 1 lists the changes described in this version of the documentation to support this release of the software. The new features described in Table 1 are available in Siebel CRM version 8.1.1.11, Siebel CRM version 8.2.2.4, and later.

Table 1. What's New in Siebel Mobile Guide: Connected Version 8.1/8.2

Topic	Description
<a href="#">"Setting SupportedMobileBrowser" on page 22</a>	Modified topic. The default value for the Application Object Manager parameter SupportMobileBrowser has changed to include support for Blackberry® Mobile.
<a href="#">"Selecting Fields, Drop-Down Lists, and Records" on page 41</a>	New topic. Describes Siebel Mobile behavior when selecting fields, drop-down lists, and records.
<a href="#">"Inline Editing" on page 41</a>	New topic. Inline editing is now supported by Siebel Mobile applications.
<a href="#">"Customizing Check Boxes" on page 42</a>	New topic. You can change how check boxes appear in Siebel Mobile applications.
<a href="#">"Data Display" on page 42</a>	New topic. You can display data in tabular format in Siebel Mobile applications.
<a href="#">"Show More and Show Less Icons" on page 42</a>	New topic. You can expand or contract the information that is displayed on the screen.
<a href="#">"Configuring Siebel Mobile Application Settings" on page 53</a>	New topic. There is a new Settings icon on the Siebel Mobile application banner, which you can use to configure the behavior of Siebel Mobile applications. You also use the Settings icon to log out of Siebel Mobile applications.
<a href="#">"Logging Out of Siebel Mobile Applications" on page 56</a>	Modified topic. You now log out of Siebel Mobile applications, using the Settings icon on the application banner.

## What's New in Siebel Mobile Guide: Connected Version 8.1, Rev. B

Table 2 lists the changes described in this version of the documentation to support this release (8.1.1.10 and 8.2.2.3) of the software.

Table 2. What's New in Siebel Mobile Guide: Connected Version 8.1, Rev. B

Topic	Description
<a href="#">"Siebel Mobile Products" on page 11</a>	New topic. Describes the different mobile applications that are included in the Siebel product line.
<a href="#">"Requirements for Setting Up Siebel Mobile Applications" on page 18</a>	New topic. Describes the requirements that must be met before setting up Siebel Mobile applications.
<a href="#">"Adding Object Managers for Siebel Mobile Applications" on page 19</a>	New topic. Describes how to run the new_compdef_sia script to add object managers for Siebel Mobile applications.
<a href="#">"Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications" on page 20</a>	New topic. Describes how to set the Siebel Application Object Manager parameters for Siebel Mobile applications.
<a href="#">"Determining the Unique User Agent String for Your Mobile Device" on page 22</a>	New topic. Describes how to determine the user agent string for your mobile device and how to update the SupportedMobileBrowser parameter.
<a href="#">"Adding Virtual Directories for Siebel Mobile Applications" on page 24</a>	New topic. Describes how to run the new_virdirs script to add virtual directories for Siebel Mobile applications.
<a href="#">"Enabling the Handheld Component Groups for Siebel Mobile Applications" on page 25</a>	New topic. Describes how to enable the component groups for Siebel Mobile applications.
<a href="#">Using the Attachment Feature on page 49</a>	New topic. Describes how to attach a new file and URL address to account and contact records in your Siebel Mobile application.
<a href="#">"Reviewing Notification Messages" on page 51</a>	Modified topic. You can now create new and modify existing notification messages from your Siebel Mobile application.
<a href="#">"Generating an Invoice for the Activity" on page 139</a>	Modified topic. You can now review the invoice line item details for an activity in your Siebel Mobile connected application for Siebel Service.
<a href="#">"Updating a Shift, Break, and Period of Unavailability" on page 143</a>	New topic. Describes how to update a shift, break, and period of unavailability in your Siebel Mobile connected application for Siebel Service.

# 2

## Overview of Siebel Mobile Applications

This chapter introduces Oracle's Siebel Mobile applications. It contains the following topics:

- [Siebel Mobile Products on page 11](#)
- [About Siebel Mobile Applications on page 14](#)
- [Requirements for Using Siebel Mobile Applications on page 15](#)
- [System Requirements for Siebel Mobile Applications on page 15](#)

**NOTE:** The procedures in this guide assume that you do not use left-hand navigation. However, you can set up left-hand navigation. For more information about left-hand navigation and about implementing it, see *Siebel Fundamentals for Siebel Open UI*.

### Siebel Mobile Products

Several mobile applications are included in the Siebel CRM product line. Each serves a different purpose and runs on different devices. Often, these applications complement each other. The mobile applications are as follows:

- **Siebel Mobile Connected Applications.** Siebel Business Applications accessed from a browser on a mobile device, where the browser is connected to a Siebel Server. This is a new offering from Oracle which provides access to Siebel Business Applications, with its native look-and-feel, from tablets and smartphones. The following applications are supported in connected mode: Siebel Pharma, Siebel Consumer Goods, Siebel Sales, and Siebel Field Service.
- **Siebel Mobile Disconnected Applications.** Siebel applications accessed from a browser on a mobile device, where the browser is not connected to a Siebel Server (offline mode). This is a new offering from Oracle which provides access to Siebel, with its native look-and-feel, from tablets and smartphones. The following applications are currently supported in disconnected mode: Siebel Pharma and Siebel Field Service.
- **Siebel Mobile Web Client and Siebel Remote.** A disconnected client and supporting server-side software. These applications provide intelligent transaction routing, data synchronization, and Store-and-Forward Messaging (SFM) capabilities. Siebel Remote works only on Microsoft® Windows™-based desktops, laptops, and tablets.  
**NOTE:** Store-and-Forward Messaging is only supported for existing customers using SFM capabilities, and it is no longer available for new customers.
- **Siebel Handheld Applications.** A disconnected client with data filtering, data synchronization, and Store-and-Forward Messaging capabilities. Siebel Handheld applications only run on Microsoft Windows Mobile 6.5.x operating system.
- **Siebel Wireless.** Siebel Business Applications delivered to client browsers that connect to a Siebel Server through a wireless network. Siebel Wireless runs on any phone that has an HTML browser.

Table 3 describes the software components of Siebel Mobile, and the supported hardware devices.

Table 3. Siebel Mobile Product Software Components and Supported Devices

Product Group	Server Components	Client Component	Supported Client Devices
Siebel Mobile Connected	Siebel Mobile application in online mode (that is, connected to Siebel Server)	Client browser. For more information, see <a href="#">“Requirements for Using Siebel Mobile Applications”</a> on page 15.	HTML5-compliant mobile devices, such as: <ul style="list-style-type: none"> <li>■ Apple® iOS devices (iPad® and iPhone®)</li> <li>■ Android OS devices (Samsung® Galaxy tablets and Galaxy smartphones)</li> <li>■ Blackberry 10 mobile devices</li> <li>■ Microsoft Windows 8 tablets</li> <li>■ Microsoft Windows 8 smartphones</li> </ul>
Siebel Mobile Disconnected	Siebel Mobile application in offline mode (that is, disconnected from Siebel Server)  Synchronization object manager	Client browser. For more information, see <a href="#">“Requirements for Using Siebel Mobile Applications”</a> on page 15.	HTML 5-compliant mobile devices, such as: <ul style="list-style-type: none"> <li>■ Apple iOS devices (iPad and iPhone)</li> <li>■ Android OS devices (Samsung Galaxy tablets and Galaxy smartphones)</li> <li>■ Blackberry 10 mobile devices</li> </ul>
Siebel Remote	Siebel Remote  Store-and-Forward Messaging	Siebel Mobile Web Client  <b>NOTE:</b> Siebel Mobile Connected and Siebel Mobile Disconnected are not related to the Siebel Mobile Web Client in any way.	Desktop PCs  Laptops  Tablets

Table 3. Siebel Mobile Product Software Components and Supported Devices

Product Group	Server Components	Client Component	Supported Client Devices
Siebel Handheld Applications	Handheld Application Synchronization Object Manager  Store-and-Forward Messaging	Siebel Handheld Client	Windows Mobile 6.5.x devices
Siebel Wireless	Wireless Object Manager	Client Browser	Any mobile device running a supported client browser, including wireless devices and handheld devices.

Table 4 describes the supported applications of Siebel Mobile, and documentation on the Siebel Bookshelf for information about these applications.

Table 4. Siebel Mobile Product Supported Applications and Related Documentation

Product Group	Supported Applications	Related Documentation
Siebel Mobile Connected	Siebel Consumer Goods Siebel Field Service Siebel Sales Siebel Pharma	If using Siebel Mobile applications in online mode only, then see the following: <ul style="list-style-type: none"> <li>■ <i>Siebel Mobile Guide: Connected</i></li> <li>■ <i>Configuring Siebel Open UI</i></li> <li>■ <i>Siebel Maintenance Release Guide on My Oracle Support</i></li> </ul>
Siebel Mobile Disconnected	Siebel Field Service Siebel Pharma	If using Siebel Mobile applications in both online and offline mode, then see the following: <ul style="list-style-type: none"> <li>■ <i>Siebel Mobile Guide: Disconnected</i></li> <li>■ <i>Configuring Siebel Open UI</i></li> <li>■ <i>Siebel Maintenance Release Guide on My Oracle Support</i></li> </ul>
Siebel Remote	Almost all Siebel Business Applications and Siebel Industry Applications  (Provides the same look and feel as those applications.)	<i>Siebel Remote and Replication Manager Administration Guide</i>  <i>Siebel Store-and-Forward Messaging Guide for Mobile Web Client</i>

Table 4. Siebel Mobile Product Supported Applications and Related Documentation

Product Group	Supported Applications	Related Documentation
Siebel Handheld Applications	Siebel Consumer Goods	<i>Siebel Consumer Goods Handheld Guide</i>
	Siebel Field Service	<i>Siebel Service Handheld Guide</i>
	Siebel Sales	<i>Siebel Sales Handheld Guide</i>
	Siebel Medical	<i>Siebel Medical Handheld Guide</i>
	Siebel Pharma	<i>Siebel Pharma Handheld Guide</i>
		<i>Siebel Store-and-Forward Messaging Guide for Handheld</i>
Siebel Wireless	Siebel Sales	<i>Siebel Wireless Administration Guide</i>
	Siebel Field Service	
	Siebel Partner Relationship Management	
	Siebel Self-Service Applications	

## About Siebel Mobile Applications

Siebel Mobile applications enable you to access Siebel CRM information with your mobile device in real time by permitting you to access a browser-based version of one of the following Siebel Business Applications on your mobile device:

- Siebel Consumer Goods
- Siebel Sales
- Siebel Service
- Siebel Pharma

The URL address that you use accesses a unique mobile-enabled Siebel Application Object Manager and renders the UI using jQuery Mobile. jQuery Mobile is a mobile framework or JavaScript library that is designed to simplify the client-side scripting of HTML. It is used to create mobile applications with a native look-and-feel which can run on multiple operating systems. For more information about jQuery Mobile, go to the jQuerymobile Website at <http://jquerymobile.com>.

Siebel Mobile applications are ideal for field sales and service representatives whose access is limited to their tablet or smartphone device while travelling or in the field with a customer. Siebel Mobile applications are designed to maximize the following:

- **Usability.** Siebel Mobile applications are designed for field sales and service users and are optimized to support frequent tasks in the sales and service cycle.
- **Productivity.** Siebel Mobile applications maximize productivity by enabling you to find the relevant information easily and to complete important activities quickly.

- **Collaboration.** Siebel Mobile connected applications enable you to pass contact information to other contacts, employees, or account team members. Additionally, you can schedule meetings and calls with contacts, employees, account team members, and even account customers, while you are mobile.

## Requirements for Using Siebel Mobile Applications

Siebel Mobile applications use Siebel Open UI. Before you can use Siebel Mobile applications, you must meet the following requirements:

- You must have a mobile device with an internet connection.
- The browser on your mobile device must support the following: HTML5, CSS 3.0 or higher, and JavaScript 1.5 or higher.
- You have reviewed the topics about Siebel Open UI and Siebel Mobile applications in the applicable *Siebel Maintenance Release Guide* on My Oracle Support (Article ID 880452.1).

## System Requirements for Siebel Mobile Applications

Siebel Mobile applications run on HTML5-compliant browsers on many mobile devices, including the following:

- Apple iOS devices (iPad and iPhone)
- Android OS devices (Samsung Galaxy tablets and Galaxy smartphones)
- Microsoft Windows 8 tablets and smartphones

Oracle does not certify any specific device as Siebel Mobile applications are standards based, and they support any device with a HTML5-compliant browser.

**NOTE:** For Siebel CRM product releases 8.1.1.9 and later and for 8.2.2.2 and later, the system requirements and supported platform certifications are available from the Certification tab on My Oracle Support. For information about the Certification application, see article 1492194.1 (Article ID) on My Oracle Support.





# 3

## Setting Up Siebel Mobile Applications

This chapter describes how to set up Siebel Mobile connected applications. It includes the following topics:

- [Process of Setting Up Siebel Mobile Connected Applications on page 17](#)
- [Requirements for Setting Up Siebel Mobile Applications on page 18](#)
- [Adding Object Managers for Siebel Mobile Applications on page 19](#)
- [Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications on page 20](#)
- [Adding Virtual Directories for Siebel Mobile Applications on page 24](#)
- [Enabling the Handheld Component Groups for Siebel Mobile Applications on page 25](#)
- [Assigning Responsibilities to Siebel Mobile Application Users on page 26](#)
- [Adding Mobile Administration Views to Siebel Administrator Responsibility on page 29](#)
- [Customizing Siebel Mobile Applications on page 29](#)
- [Enabling JavaScript for Safari on page 31](#)
- [Troubleshooting Your Siebel Mobile Application on page 32](#)

### Process of Setting Up Siebel Mobile Connected Applications

To set up Siebel Mobile connected applications, perform the following tasks:

- 1 ["Requirements for Setting Up Siebel Mobile Applications" on page 18](#)
- 2 ["Adding Object Managers for Siebel Mobile Applications" on page 19](#)
- 3 ["Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications" on page 20](#)
- 4 ["Adding Virtual Directories for Siebel Mobile Applications" on page 24](#)
- 5 ["Enabling the Handheld Component Groups for Siebel Mobile Applications" on page 25](#)
- 6 ["Assigning Responsibilities to Siebel Mobile Application Users" on page 26](#)
- 7 ["Adding Mobile Administration Views to Siebel Administrator Responsibility" on page 29](#)
- 8 ["Customizing Siebel Mobile Applications" on page 29](#)

# Requirements for Setting Up Siebel Mobile Applications

This task is a step in “[Process of Setting Up Siebel Mobile Connected Applications](#)” on page 17. Before starting to set up your Siebel Mobile application, you must meet the following requirements:

- 1 The installed software for Siebel Mobile is Siebel Fix Pack 8.1.1.11/8.2.2.4.  

Install either Siebel CRM version 8.1.1.11/8.2.2.4 for new installations or Siebel Fix Pack 8.1.1.11/8.2.2.4 for existing installations prior to 8.1.1.11/8.2.2.4. For more information about new installations and patch installations, see *Siebel Installation Guide* for the operating system you are using.
- 2 If it is required, you must run the Siebel Incremental Repository Merge to update your database to 8.1.1.11/8.2.2.4.  

Running IRM is necessary only after installing 8.1.1.11/8.2.2.4 as a patch installation for an existing 8.1.1.x/8.2.2.x installation. For more information about setting up and using Siebel Incremental Repository Merge, see *Siebel Database Upgrade Guide*.

For new installations, running Siebel Incremental Repository Merge is not required. Install a fresh Siebel database and go through the database install process to get to 8.1.1.11/8.2.2.4 Fix Pack.
- 3 All standard Siebel Server and Siebel Web Server Extension (SWSE) configurations have been carried out before you run any Siebel Mobile scripts on the Siebel Server and SWSE.
  - For existing installations, you might have to run some Siebel Mobile scripts on the Siebel Server and SWSE. For more information, see the following topics:
    - “[Adding Object Managers for Siebel Mobile Applications](#)” on page 19
    - “[Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications](#)” on page 20
    - “[Adding Virtual Directories for Siebel Mobile Applications](#)” on page 24
  - For new Siebel Mobile installations, doing the standard Siebel Server and SWSE configuration is sufficient for the language or languages selected during Siebel CRM installation. However, to set up Siebel Mobile applications for new languages, then complete the following procedures:
    - “[Adding Object Managers for Siebel Mobile Applications](#)” on page 19
    - “[Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications](#)” on page 20
    - “[Adding Virtual Directories for Siebel Mobile Applications](#)” on page 24

**NOTE:** The Siebel Bookshelf is available on Oracle Technology Network (<http://www.oracle.com/technetwork/indexes/documentation/index.html>) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

# Adding Object Managers for Siebel Mobile Applications

This task is a step in "Process of Setting Up Siebel Mobile Connected Applications" on page 17 and is required if deploying your Siebel Mobile application in a new language.

The following procedure shows you how to run the `new_compdef_sia` script to add new object managers for Siebel Mobile applications. Run `new_compdef_sia` on all Siebel Servers that must support Siebel Mobile applications. Run `new_compdef_sia` once for each language that must support Siebel Mobile applications. Running the script adds the Siebel Application Object Managers for Siebel Mobile applications that are in the HandheldSync and HandheldSyncSIS component groups.

For new installations of Siebel Mobile applications, the Siebel Application Object Managers are created by default in the language selected during Siebel CRM installation. For example, if ENU is the language selected, then the Siebel Application Object Managers shown in Table 5 are automatically added for ENU so it is not necessary to add them again. However, if you want to run your Siebel Mobile applications subsequently in a new language, then you must run `new_compdef_sia` for each language that must be supported, as shown in the following procedure.

Table 5. Siebel Application Object Managers for Siebel Mobile Applications

Application Object Manager	Siebel Mobile Application Name
ePharmamObjMgr_enu	Siebel ePharma Mobile
CGmObjMgr_enu	Siebel CG Sales Enterprise Mobile
SalesmObjMgr_enu	Siebel Sales Enterprise Mobile
ServicemObjMgr_enu	Siebel Field Service Mobile

## To add object managers for Siebel Mobile applications

- 1 Stop the Siebel Server.
- 2 Stop the Siebel Gateway Name Server and make a backup of the `siebns.dat` file.
- 3 Restart the Siebel Gateway Name Server.
- 4 Set the `SIEBEL_HOME` environment variable to the `SES_HOME/si ebsrvr` directory.
- 5 Navigate to the following folder from, for example, a command prompt:  
`SES_HOME/si ebsrvr/bi n/<LANG>`
- 6 Execute one of the commands shown in the following table, as required:

Operating System	Command
Microsoft Windows	Execute the following command on Windows: <code>new_compdef_sia.bat &lt;GATEWAY&gt;:&lt;PORT&gt; &lt;ENTERPRISE&gt;  &lt;USERNAME&gt; &lt;PASSWORD&gt; &lt;LANG&gt;</code>

Operating System	Command
Linux or UNIX	Execute the following command on Linux or UNIX: <pre>new_compdef_si a.ksh &lt;GATEWAY&gt;: &lt;PORT&gt; &lt;ENTERPRISE&gt; &lt;USERNAME&gt; &lt;PASSWORD&gt; &lt;LANG&gt;</pre>

- 7 When prompted, verify that the parameters passed are correct.
- 8 Start the Siebel Server.
- 9 Enable the component groups for Siebel Mobile.

For more information, see [“Enabling the Handheld Component Groups for Siebel Mobile Applications” on page 25.](#)

## Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications

This task is a step in [“Process of Setting Up Siebel Mobile Connected Applications” on page 17](#) and is required if deploying your Siebel Mobile application in a new language.

The following procedure shows you how to set the Siebel Application Object Manager parameters. Siebel Application Object Manager parameters must be set on every Siebel Server that will support Siebel Mobile, and for each language that must support Siebel Mobile applications. For more information about Siebel Application Object Manager parameters and the Siebel Server Manager, see *Siebel System Administration Guide*. For more information about enabling Siebel Open UI for Siebel Application Object Managers, see *Siebel Installation Guide* for the operating system you are using.

For new installations of Siebel Mobile applications where, for example, ENU is the language selected, the Siebel Application Object Manager parameter settings shown in [Table 6](#) are automatically preconfigured for ENU, so it is not necessary to set them again. However, if you want to run your Siebel Mobile applications subsequently in a new language, then you must configure the parameter settings shown in [Table 6](#) for the language that must be supported, as shown in the following procedure.

### To set the Siebel Application Object Manager parameters

- 1 Log in to the `svrmgr`.
- 2 Enter the following commands separately at the `svrmgr` command line for each Siebel Mobile application in the appropriate language.

For example, for U.S. English, enter the commands as follows:

```
change param EnableOpenUI = True for comp XObjmgr_enu  
change param AppletSelectStyle="Applet Select" for comp XObjmgr_enu  
change param HighInteractivity=TRUE for comp XObjmgr_enu  
change param MobileApplication=TRUE for comp XObjmgr_enu  
change param EnableInlineForList=Never for comp XObjmgr_enu
```

```
change param ShowWriteRecord=TRUE for comp XObjmgr_enu
change param EnableSIFocusTracking=TRUE for comp XObjmgr_enu
change param SupportedMobileBrowser="Tablet: iPad, Android-Chrome-GT-
P7510, Android-Chrome-Nexus, Android-Chrome-Mi cromax P500(Funbook), webOS, MSIE-
Windows NT-Touch, MSIE-Windows NT-ARM|Phone: iPhone, iPod, Android-Chrome-
Mobile, MSIE-Windows Phone, BB10-Mobile" for comp XObjmgr_enu
```

For each language that you want to set up for your Siebel Mobile application, substitute the language in question for *\_enu*. For example, use *\_esp* to enter the commands for the Spanish language as follows:

```
change param EnableOpenUI = True for comp XObjmgr_esp
change param AppletSelectStyle="Applet Select" for comp XObjmgr_esp
. . .
```

Note that the Siebel Application Object Manager parameter settings shown in [Table 6](#) are required for all Siebel Mobile applications.

Table 6. Siebel Application Object Manager Parameters for Siebel Mobile Applications

Parameter Name	Parameter Setting
EnableOpenUI	EnableOpenUI=TRUE
AppletSelectStyle	AppletSelectStyle="Applet Select"
HighInteractivity	HighInteractivity=TRUE
MobileApplication	MobileApplication=TRUE For more information, see <a href="#">Setting MobileApplication on page 22</a> .
EnableInlineForList	EnableInlineForList=Never
ShowWriteRecord	ShowWriteRecord=TRUE
EnableInlineForList	EnableInlineForList=Never
EnableSIFocusTracking	EnableSIFocusTracking=TRUE
SupportedMobileBrowser	SupportedMobileBrowser="Tablet: iPad, Android-Chrome-GT-P7510, Android-Chrome-Nexus, Android-Chrome-Mi cromax P500(Funbook), webOS, MSIE-Windows NT-Touch, MSIE-Windows NT-ARM Phone: iPhone, iPod, Android-Chrome-Mobile, MSIE-Windows Phone, BB10-Mobile"  <b>NOTE:</b> This is the default value for SupportedMobileBrowser. However, this value might vary depending on the browser you are using, the browser version, your operating system, the name of your device, the device type, and so on. For more information, see <a href="#">"Setting SupportedMobileBrowser" on page 22</a> .

## Setting MobileApplication

Set MobileApplication to true for each Siebel Application Object Manager that you set up for Siebel Mobile so that the look-and-feel of the application will display in mobile (and not desktop) mode. For more information about how to set MobileApplication, see [“Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications” on page 20](#).

## Setting SupportedMobileBrowser

Set SupportedMobileBrowser to include each different type of mobile device that you want your Siebel Mobile application to support. The default value for SupportedMobileBrowser for Siebel Mobile 8.1.1.11/8.2.2.4 or later is as follows:

```
SupportedMobileBrowser="Tablet: iPad, Android-Chrome-GT-P7510, Android-Chrome-Nexus, Android-Chrome-Miromax P500(Funbook), webOS, MSIE-Windows NT-Touch, MSIE-Windows NT-ARM|Phone: iPhone, iPod, Android-Chrome-Mobile, MSIE-Windows Phone, BB10-Mobile"
```

For information about how to set SupportedMobileBrowser, see [“Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications” on page 20](#).

## Syntax for Listing the Parameter Value

The syntax for listing the parameter values is as follows:

- A colon (:) must follow each new device type. For example:  
*Device:*
- A vertical bar (|) must separate each mobile device definition.
  - The value after the vertical bar up until the next colon (:) is considered as the start of a new device type definition.
  - The values after the colon (:) represent the unique user agent strings for different mobile devices. The user agent strings are separated by a comma.
- If there is no colon (:) in the SupportedMobileBrowser string, then it is assumed that the SupportedMobileBrowser string is defining a mobile device of type Tablet by default.

You can change the default value of SupportedMobileBrowser by adding the unique user agent strings for more mobile devices to the parameter. For more information, see [“Determining the Unique User Agent String for Your Mobile Device” on page 22](#).

## Determining the Unique User Agent String for Your Mobile Device

A *user agent* string is the string that the browser sends to a server every time it visits a Web page. The user agent string includes information about the following: the browser you are using, the browser version, your operating system, the name of your device, the device type, and so on. The server (belonging to the Web page that you are visiting) uses this information to provide you with the content that best suits the browser and device that you are using. To obtain the user agent string for your mobile device, browse to the following or a similar Web site from your mobile device:

<http://whatsmyuseragent.com/>

After you obtain the user agent string for the mobile device, you must pick the words from the user agent string which will uniquely identify your device type, device name, the operating system being used, browser, browser version, and so on. All user agent strings typically contain common words like Mozilla, Linux, and AppleWebKit so be careful when picking the unique words to identify your device.

The following procedure shows you how to determine the unique user agent string for your mobile device for Siebel Mobile 8.1.1.11/8.2.2.4 or later, and how to add the unique user agent string to SupportedMobileBrowser.

When forming your unique user agent string, note that the sequence of the words does not matter, the combination of words must be unique, and the words must be separated by a hyphen (-). When adding user agent strings to SupportedMobileBrowser, the user agent strings must be separated by a comma. Note the following:

- To add a new phone device, then add the user agent string to the Phone: section of SupportedMobileBrowser.
- To add a new tablet device, then add the user agent string to the Tablet: section of SupportedMobileBrowser.

### ***To determine the unique user agent string for your mobile device***

- 1 Start the browser on your mobile device.
- 2 Navigate to the following Web site from the browser on your mobile device:

<http://whatsmyuseragent.com/>

- 3 The user agent string for your mobile device and browser is returned.

Note that the user agent string that is returned will vary depending on the browser you are using, the browser version, your operating system, the name of your device, the device type, and so on. But an example of a user agent string for Galaxy tablet (mobile device) is as follows:

```
Mozilla/5.0 (Linux; Android 4.0.4; GT-P7510 Build/IMM76D)
AppleWebKit/535.19 (KHTML, like Gecko)
Chrome/18.0.1025.166 Safari/535.19
```

An example of a user agent string for Galaxy Note (phone device) is as follows:

```
Mozilla/5.0 (Linux; Android 4.0.4; GT-N7000 Build/IMM76D)
AppleWebKit/535.19 (KHTML, like Gecko)
Chrome/18.0.1025.166 Mobile Safari/535.19
```

- 4 To add the unique user agent string for Galaxy tablet, do the following:
  - a Pick *Android*, *GT-P7510*, and *Chrome* to form the unique user agent string because the other elements in the string are common for other android-based devices.
  - b Add **Android-Chrome-GT-P7510** to SupportedMobileBrowser, for example, as follows:

```
SupportedMobileBrowser="Tablet: iPad, Linux, Android-Chrome, Android-Chrome-GT-P7510, webOS, MSIE-Windows NT-Touch, MSIE-Windows NT-ARM|Phone: iPhone, iPod, Linux, Android-Chrome-Mobile, MSIE-Windows Phone"
```

5 Then do the following to add the unique user agent string for Galaxy Note (phone device):

- a Pick *Android*, *Mobile*, and *Chrome* to form the unique user agent string because the other elements in the string are common for other android-based phone devices.
- b Add **Android-Chrome-Mobile** to SupportedMobileBrowser, for example, as follows:

```
SupportedMobileBrowser="Tablet: iPad, Linux, Android-Chrome, webOS, MSI E-Windows NT-Touch, MSI E-Windows NT-ARM|Phone: iPhone, iPod, Linux, Android-Chrome-Mobile, MSI E-Windows Phone"
```

**NOTE:** The word *Mobile* is always present in the user agent strings of Android-based phones, so it is not necessary to add the device name or model number to the server parameter string.

## Adding Virtual Directories for Siebel Mobile Applications

This task is a step in ["Process of Setting Up Siebel Mobile Connected Applications"](#) on page 17 and is required if deploying your Siebel Mobile application in a new language.

Use the following procedure to run the `new_virdirs` script to add virtual directories for Siebel Mobile. You create virtual directories on a particular Web server where Siebel Web Server Extension (SWSE) is installed. You must create the virtual directories on every Web server that supports Siebel Mobile applications. For more information about creating custom virtual directories, see *Siebel Installation Guide* for the operating system you are using.

For new installations of Siebel Mobile applications, the virtual directories are created by default in the language selected during Siebel CRM installation. For example, if ENU is the language selected, then virtual directories are automatically added for ENU. However, if you want to run your Siebel Mobile applications subsequently in a new language, then you must run `new_virdirs` for each language that must be supported, as shown in the following procedure.

### *To add virtual directories for Siebel Mobile applications*

1 Stop the Web server.

For more information about starting and stopping the Web server, see *Siebel Installation Guide* for the operating system you are using.

2 Create a backup copy of each of the following files:

- `eapps.cfg`
- `eapps_sia.cfg`
- Web server configuration files. For example, `obj.conf`, `httpd.conf`, and so on.

3 From the `EAPPWEB_HOME/config` directory, execute the `new_virdirs.sh` or `new_vdirs.bat` script with the appropriate parameters shown in the following table.



Operating System	Parameters
Microsoft Windows	<p>Only one parameter is required on Windows:</p> <pre>eappweb\config\new_virdirs.bat &lt;LANG&gt;</pre>
Linux or UNIX	<p>The script on UNIX operating systems accepts both &lt;LANG&gt; and &lt;WEBSERVER_LOCATION&gt;:</p> <pre>./new_virdirs.sh &lt;LANGUAGES&gt; &lt;WEBSERVER_LOCATION&gt;</pre> <p>where:</p> <ul style="list-style-type: none"> <li>■ <i>LANGUAGES</i> is a list of language codes, where a comma separates each code.</li> <li>■ <i>WEBSERVER_LOCATION</i> identifies the folder where the Web server resides.</li> </ul>

**NOTE:** If execution of the `new_virdirs.sh` or `new_vdirs.bat` script fails, then you must restore all necessary files from the backup in [Step 2](#).

4 Restart the Web server.

Access the new components using the URL. For more information about the Siebel Mobile application URLs, see [“Logging In to Siebel Mobile Applications”](#) on page 33.

## Enabling the Handheld Component Groups for Siebel Mobile Applications

The handheld components for Siebel Mobile connected must be enabled on the supported Siebel Server. The following procedure shows you how to enable the handheld component groups that are required for Siebel Mobile applications. This task is a step in [“Process of Setting Up Siebel Mobile Connected Applications”](#) on page 17.

### *To enable the handheld component groups for Siebel Mobile applications*

- 1 Log in to the Siebel Web application, and then do the following:
  - a Navigate to the Administration - Server Configuration screen, then the Component Groups view.
  - b Query for the HandheldSync\* component group.
 

The following handheld component groups are returned:

    - ❑ HandheldSync
    - ❑ HandheldSyncSIS
  - c For each of these component groups, do the following:
    - ❑ Select the component group, and then click the Enable button.

- In the Component Group Assignments applet, click the Enable button for the required Siebel Server.

- d If required, go to the LifeSciences component group, and enable it as described in [Step c](#).

**NOTE:** The LifeSciences component group must only be enabled if using the Siebel Mobile application for Siebel Pharma.

- 2 Stop, and then restart the Siebel Server.

## Assigning Responsibilities to Siebel Mobile Application Users

Responsibilities control the views to which users have access. This task is a step in [“Process of Setting Up Siebel Mobile Connected Applications”](#) on page 17.

### *To assign user responsibilities to Siebel Mobile application users*

- 1 Log in to the Siebel application as a user with Administrative responsibility.
- 2 Navigate to the Administration - Application screen, then the Responsibilities view.
- 3 Query for an appropriate Siebel Mobile application user role.

For example, query for the following:

PH Pharma Sales Rep - US Sales

- 4 In the lower applet under views, add the appropriate Siebel Mobile application views.

**NOTE:** Views for the following mobile applications are added by default as part of the seed data for Siebel Mobile, so it is not necessary to manually add them again: Siebel ePharma Mobile, Siebel Consumer Goods Mobile, Siebel Sales Mobile, Siebel Field Service Mobile.

- The following views are added by default for Siebel Pharma:

- Pharma Account Addresses View - Mobile
- Pharma Account Affiliations View - Mobile
- Pharma Account Calls View - Mobile
- Pharma Account Contact View - Mobile
- Pharma Account List View - Mobile
- Pharma Account Relationships View - Mobile
- Pharma Contact Address View - Mobile
- Pharma Contact Affiliations View - Mobile
- Pharma Contact Best Contact Times View - Mobile
- Pharma Contact Call View - Mobile
- Pharma Contact List View - Mobile
- Pharma Contact Relationships View - Mobile
- Pharma Contact State Licenses View - Mobile
- SIS HH Pharma Account Call Attendee View - Mobile
- SIS HH Pharma Professional Call Products Detailed View - Mobile
- SIS HH Pharma Professional Promotional Items View - Mobile
- SIS HH Pharma Professional Samples Dropped View - Mobile
- LS Pharma Professional Call Execute View - Mobile

LS Pharma Call Signature Capture View - Mobile  
LS Pharma Call Validation Results View - Mobile  
LS Pharma Signature Audit Administration View\_PUI  
LS Pharma Professional Call Execute View - Mobile

- The following views are added by default for Siebel Consumer Goods:

CG Account Addresses View - Mobile  
CG Account Calls Views - Mobile  
CG Account Contacts View - Mobile  
CG Account List View - Mobile  
CG Account Notes View - Mobile  
CG Account Orders View - Mobile  
CG Account Product Audits View - Mobile  
CG Account Products View - Mobile  
CG Contact Addresses View - Mobile  
CG Contact Best Call Times View - Mobile  
CG Contact List View - Mobile  
CG Routes Accounts View - Mobile  
CG Routes List View - Mobile  
CG Call Account Assessment View - Mobile  
CG Call Account Notes View - Mobile  
CG Call Merchandising Audits View - Mobile  
CG Call Orders View - Mobile  
CG Call Retail Audit List View - Mobile  
CG Outlet Visit Activities List View - Mobile  
CG Visit Call Items List View - Mobile  
CG Order List View - Mobile  
CG Return Order List View - Mobile

- The following views are added by default for Siebel Sales:

SHCE Account List View - Mobile  
SHCE Account Contacts View - Mobile  
SHCE Account Opportunity View - Mobile  
SHCE Account Address View - Mobile  
SHCE Account Activities View - Mobile  
SHCE Account Team View - Mobile  
SHCE Sales Contact List View - Mobile  
SHCE Sales Contact Opportunities View - Mobile  
SHCE Contact Team View - Mobile  
SHCE Contact Address View - Mobile  
SHCE Sales Lead List View - Mobile  
SHCE Sales Lead Opportunities View - Mobile  
SHCE Opportunities List View - Mobile  
SHCE Sales Opportunities Contacts View - Mobile  
SHCE Sales Opportunities Products View - Mobile  
SHCE Sales Opportunities Quotes View - Mobile  
SHCE Sales Opportunities Activities View - Mobile  
SHCE Sales Opportunities Opportunity Team View - Mobile  
SHCE Quote List View - Mobile  
SHCE Quote Quoteltem View - Mobile

- SHCE Quote Order View - Mobile
- SHCE Quote Team View - Mobile
- SHCE Sales Orders List View - Mobile
- SHCE Sales Order Line Item View - Mobile
- SHCE Activity List View - Mobile
- SHCE Sales Activity Contact Form View - Mobile
- SHCE Sales Activity Employee Form View - Mobile

■ The following views are added by default for Siebel Field Service:

- SHCE Service Account Assets View - Mobile
- SHCE Service Account Contacts View - Mobile
- SHCE Service Account Entitlements View - Mobile
- SHCE Service Account SRs View - Mobile
- SHCE Service Accounts View - Mobile
- SHCE Service Activity Assets List View - Mobile
- SHCE Service Activity Attachment View - Mobile
- SHCE Service Activity Contact Form View - Mobile
- SHCE Service Activity FS Expense View - Mobile
- SHCE Service Activity FS Instructions List view - Mobile
- SHCE Service Activity FS Steps View - Mobile
- SHCE Service Activity Home Page View - Mobile
- SHCE Service Activity Invoice Signature View - Mobile
- SHCE Service Activity SR List View - Mobile
- SHCE Service Activity Time View - Mobile
- SHCE Service Asset Entitlements View - Mobile
- SHCE Service Asset List View - Mobile
- SHCE Service Asset Measurement View - Mobile
- SHCE Service Asset Reading View - Mobile
- SHCE Service Asset Warranty View - Mobile
- SHCE Service FS Activity Part Movements View - Mobile
- SHCE Service FS Activity Recommended Parts Tools - Mobile
- SHCE Service FS Invoice - Auto Invoice View - Mobile
- SHCE Service Invoice Line Item Details View - Mobile
- SHCE Service Invoice List View - Mobile
- SHCE Service Invoice Line Item View - Mobile
- SHCE Service My Part Browser View - Mobile
- SHCE Service Order Line Item View - Mobile
- SHCE Service Orders List View - Mobile
- SHCE Service Part Browser Availability View - Mobile
- SHCE Service Part Browser Substitute View - Mobile
- SHCE Service SR Activity View - Mobile
- SHCE Service SR Invoices View - Mobile
- SHCE Service SR Orders View - Mobile
- SHCE Service Service Request Invoice Signature View - Mobile
- SHCE Service Service Request View - Mobile
- SHCE Technician Breaks View - Mobile
- SHCE Technician POU View - Mobile
- SHCE Technician Shifts View - Mobile
- SHCE Part Browser Substitute View - Mobile

For more information about associating views and responsibilities with users, and setting responsibilities for users, see *Siebel Security Guide* and *Siebel Applications Administration Guide*.

## Adding Mobile Administration Views to Siebel Administrator Responsibility

Use the following procedure to add the mobile administration views to the Siebel administrator responsibility. This task is a step in [“Process of Setting Up Siebel Mobile Connected Applications”](#) on page 17.

### *To add the mobile administration views to the Siebel administrator responsibility*

- 1 Log in to the Siebel application as a user with Administrative responsibility.
- 2 Navigate to the Administration - Application screen, then the Views view.
- 3 Click New, and add the following new views:
  - Handheld Business Component Filters Administration View – Mobile
  - Handheld Application Administration Settings View – Mobile
- 4 In the Responsibility list applet, add the Siebel Administrator responsibility for the new views you added in [Step 3](#).

## Customizing Siebel Mobile Applications

This task is a step in [“Process of Setting Up Siebel Mobile Connected Applications”](#) on page 17.

You can use Siebel Open UI Mobile framework, templates, and style sheets to configure the user interface and behavior of your Siebel Mobile application to address your particular business needs. You can customize the look-and-feel of your Siebel Mobile application by modifying the JavaScript files and by using Siebel Tools to expose different objects in your application.

The following customizations are recommended:

- Set up the jQuery Mobile (JQM) grid renderer so that the mobile application data displays in grid (tabular) format.
- Set up landscape and portrait layout for mobile applications so that the views are visible on tablets.
- Set up infinite scroll for mobile applications, which is a feature that allows you to scroll through records in a list applet indefinitely.
- Set up GPS so that when you tap the Pin icon in mobile applications, a map window opens showing the location details.

For more specific information about how to implement each of these recommendations and other mobile customizations, see *Configuring Siebel Open UI*.

## Configuring Application Templates and Style Sheets

You can use the Siebel Open UI Mobile framework, templates, and style sheets to customize the look-and-feel of your Siebel Mobile application. For more information about the Siebel Open UI templates and style sheets, see *Configuring Siebel Open UI*.

## Modifying the CSS Style Sheet

Siebel Mobile applications include a ready-to-use CSS style sheet, called *theme-black.css*. You can modify the *theme-black.css* style sheet to get the required look-and-feel for your application interface. For Apple iPhone applications, you can modify the *theme-phone.css* style sheet. For more information about the Siebel Open UI style sheets, see *Configuring Siebel Open UI*.

## Using Third-Party JavaScript Plug-Ins to Customize Siebel Mobile Applications

You can modify the JavaScript files to customize the look-and-feel of your Siebel Mobile application features. The following third-party browser plug-ins are supported:

- **Mobiscroll 2.5.0.** Use this plug-in to add a scroll wheel for a date-time editor. For more information about Mobiscroll, see the Mobiscroll documentation.
- **jQuery Mobile 1.3.0.** Use this plug-in to add touch-friendly UI widgets, including:
  - **jQuery UI Google® Map 3.0.** Use this plug-in to integrate Google Maps™ mapping service.
  - **jQuery Mobile SimpleDialog.** Use this plug-in to create a modal dialog box.
  - **jQuery SwipeButton.js.** Use this plug-in to add the iPhone swipe-functionality for deleting items on list views.
  - **jQuery scrollview.** Use this plug-in to add grab-and-drag scrolling.
  - **jQuery.signaturepad.min.js.** Use this plug-in to create a signature canvas for capturing signatures in your mobile application.
  - **jQuery ThemeRoller.** Use this plug-in to define the layout and color scheme for the pages in your mobile application.

For more information about jQuery Mobile, go to the jQuerymobile Website.

For more information about implementing each of these JavaScript plug-ins to customize the look-and-feel of your Siebel Mobile application features, see *Configuring Siebel Open UI*.

## Using Siebel Tools to Expose Objects in Siebel Mobile Applications

You can use the same tool set (Siebel Tools) and other infrastructure as the rest of the Siebel Business Applications, to configure the user interface and behavior of many aspects of your Siebel Mobile application to address your particular business needs. In particular, you must use Siebel Tools to do the following:

- Configure Siebel Open UI to display desktop views in mobile Web clients.
- Apply Siebel Web templates to mobile views.
- Set up data for mobile examples.

- Create a custom mobile list.
- Add maps that include location data in a mobile application.

For more information about these tasks and others and about using Siebel Tools to expose objects in Siebel Mobile applications, see *Configuring Siebel Open UI*.

#### Related Topics

["Inline Editing" on page 41](#)

["Customizing Check Boxes" on page 42](#)

["Data Display" on page 42](#)

["Displaying Location Details" on page 48](#)

["Configuring Siebel Mobile Application Settings" on page 53](#)

## Enabling JavaScript for Safari

To use Siebel Mobile applications on Safari, JavaScript must be enabled for Safari.

#### *To enable JavaScript for Safari*

- 1 Start your Safari browser.
- 2 Select Preferences from the Safari menu.
- 3 Click Security.
- 4 Select the Enable JavaScript option.
- 5 Close the Preferences window.
- 6 Close and restart Safari.

# Troubleshooting Your Siebel Mobile Application

Table 7 shows some common errors that users might encounter when trying to access Siebel Mobile applications on their mobile device.

Table 7. Troubleshooting Your Siebel Mobile Application

Problem	Cause	Solution
<p>The Siebel Mobile application user interface is not displaying correctly on the mobile device.</p>	<p>The Siebel Mobile application is not rendering correctly.</p>	<p>Check the browser that is being used on your mobile device. The browser on your mobile device must support the following:</p> <ul style="list-style-type: none"> <li>■ HTML5</li> <li>■ CSS 3.0 or higher</li> <li>■ JavaScript 1.5 or higher</li> </ul>
<p>If you get errors similar to the following:</p> <p>Tag: swe:nav-control is not valid in this context.</p> <p>...</p> <p>Error creating Parameter: HighInteractivity for Comp: ePharmaMObjMgr_ENU @ in CompGroup: HandheldSyncSIS Strict Flag set to FALSE, continuing with the next Object...</p> <p>Error creating Parameter: MobileApplication for Comp: ePharmaMObjMgr_ENU @ in CompGroup: HandheldSyncSIS Strict Flag set to FALSE, continuing with the next Object...</p>	<p>The Siebel Mobile application is not rendering correctly.</p>	<p>Make sure that the Siebel Application Object Manager parameters are configured correctly for your Siebel Mobile application.</p> <p>If you have to set the parameters again, make sure that you run the <code>svrmgr</code> command for your Siebel Application Object Manager. For more information, see <a href="#">“Setting Siebel Application Object Manager Parameters for Siebel Mobile Applications”</a> on page 20.</p>



# 4

## Getting Started with Siebel Mobile Applications

This chapter describes how to get started with Siebel Mobile applications, and the common procedures that you can execute in online (connected) mode in all Siebel Mobile applications. It includes the following topics:

- [Logging In to Siebel Mobile Applications on page 33](#)
- [Navigating Siebel Mobile Applications User Interface on page 34](#)
- [Using the Calendar Feature on page 43](#)
- [Running Predefined Queries on page 43](#)
- [Managing Records in Siebel Mobile Applications on page 43](#)
- [Menu Button on page 47](#)
- [Creating Bookmarks on page 48](#)
- [Displaying Location Details on page 48](#)
- [Using the Attachment Feature on page 49](#)
- [Starting an External Application on page 51](#)
- [Reviewing Notification Messages on page 51](#)
- [Printing from Siebel Mobile Applications on page 52](#)
- [Configuring Siebel Mobile Application Settings on page 53](#)
- [Logging Out of Siebel Mobile Applications on page 56](#)

**NOTE:** For more detailed information about Siebel Pharma, Siebel Field Service, and Siebel Consumer Goods, see the appropriate guide on the Siebel Bookshelf: *Siebel Life Sciences Guide*, *Siebel Field Service Guide*, *Siebel Consumer Goods Guide*.

## Logging In to Siebel Mobile Applications

Siebel Mobile applications are optimized to run on mobile devices. This topic describes how to log in to Siebel Mobile applications on your mobile device.

### *To log in to Siebel Mobile applications*

- 1 Start the browser on your mobile device.
- 2 Enter the URL address for Siebel Mobile applications in the following format:

```
http://<web site domain>/<objmgr_lang>/start.swe
```

For example, if the Web site is `www.localhost.com` and the Siebel Application Object Manager component (Objmgr) is `epharmam_enu`, `cgm_enu`, `salesm_enu`, or `servicem_enu`, then the URL is as follows:

`http://www.local host.com/epharmam_enu/start.swe`

`http://www.local host.com/cgm_enu/start.swe`

`http://www.local host.com/sal esm_enu/start.swe`

`http://www.local host.com/servi cem_enu/start.swe`

Do not omit `start.swe` or use a previous URL (with SWE commands) because the connection to the server might fail. You can also create an icon on your iPad for the Siebel Mobile application, and tap this icon to start the application, rather than enter the URL address each time to start the application. Siebel Mobile applications have their own URL addresses, which are different from the URL addresses that you use to access the typical Siebel Business Applications. You can access Siebel Business Applications with full functionality on your mobile device browser by logging in using the appropriate URL address.

- 3 Enter your login credentials, for example, as follows:

Username: JSmi th  
Password: *password*

- 4 Tap Login.

When you log in to Siebel Mobile connected applications, you are connected to a unique mobile-enabled Siebel Application Object Manager for the Siebel application. By default, you log in to Siebel Mobile connected applications in connected mode, where you are connected to the Siebel Server.

## Navigating Siebel Mobile Applications User Interface

The user interface for Siebel Mobile applications is divided into three areas: the application banner, the left pane, and the right pane. The callouts in [Figure 1 on page 35](#) show these three areas.

### Application Banner

The application banner appears along the top of the UI, and it persists for all views. The banner displays icons representing Siebel objects that you can access using Siebel Mobile applications. Tapping any Siebel object icon redirects you to a screen where you can manage the selected Siebel object. The application banner for some Siebel Mobile applications displays the following Siebel objects by default: Contacts and Accounts. However, other Siebel objects are available on the application banner according to the Siebel Mobile application that you are using, as shown in [Table 8](#).

Table 8. Siebel Objects on the Application Banner

Application	Siebel Objects
Siebel Mobile connected application for Siebel Pharma	The following Siebel objects are available on the application banner: Calls, Contacts, and Accounts. For more information, see <a href="#">Chapter 5, "Using the Siebel Mobile Application for Siebel Pharma."</a>

Table 8. Siebel Objects on the Application Banner

Application	Siebel Objects
Siebel Mobile connected application for Siebel Consumer Goods	The following Siebel objects are available on the application banner: Calls, Contacts, Accounts, Routes, Orders, and Returns. For more information, see <a href="#">Chapter 6, "Using the Siebel Mobile Application for Siebel Consumer Goods."</a>
Siebel Mobile connected application for Siebel Sales	The following Siebel objects are available on the application banner: Contacts, Accounts, Activities, Leads, Opportunities, Orders, and Quotes. For more information, see <a href="#">Chapter 7, "Using the Siebel Mobile Application for Siebel Sales."</a>
Siebel Mobile connected application for Siebel Field Service	The following Siebel objects are available on the application banner: Activities, Service Requests, Accounts, Part Browser, Orders, Invoices, and Assets. For more information, see <a href="#">Chapter 8, "Using the Siebel Mobile Application for Siebel Field Service."</a>

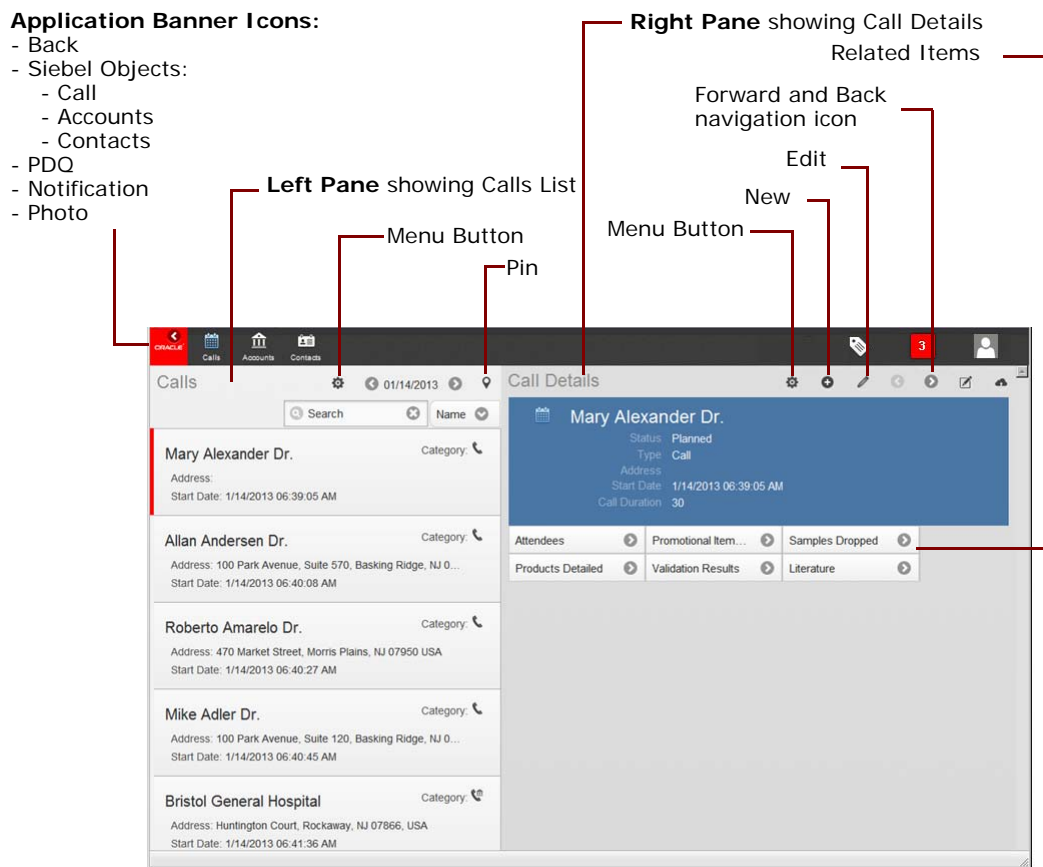


Figure 1. Siebel Mobile Connected Application: Calls List and Call Details

The Back icon is available on the left side of the application banner beside the Siebel objects. The following icons are available on the right side of the application banner: PDQ (Predefined Query), Notification, and Logout.

- **Back.** Tap this icon to return to the previous page view.  
For more information, see [“Using the Back Button on the Application Banner” on page 41.](#)
- **PDQ (Predefined Query).** Tap this icon to display a list of the available predefined queries, which you can run for the selected object on the application banner.  
For more information, see [“Running Predefined Queries” on page 43.](#)
- **Notification.** Tap this icon to display notification messages.  
For more information, see [“Reviewing Notification Messages” on page 51.](#)
- **Photo.** Tap this icon to configure the behavior of Siebel Mobile applications, or to log out of Siebel Mobile applications.  
For more information, see [“Configuring Siebel Mobile Application Settings” on page 53.](#)

## Left Pane

The left pane, on the left side of the UI, displays different information according to the selection that you make in the UI. For example:

- If you tap Calls on the application banner, then the left pane displays the Calls list. For more information, see [“Displaying the List and Record Details View” on page 39.](#)
- If you open a call record by tapping any related item associated with the call record, then the left pane displays the call record’s details. For more information, see [“Opening Records and Associated Related Items” on page 39.](#)

## Right Pane

The right pane or work area, on the right side of the UI, displays context information according to the selection that you make in the left pane and in the UI in general. For example:

- If you tap Calls on the application banner and a call record in the Calls list, then the work area displays the call record’s details. For more information, see [“Displaying the List and Record Details View” on page 39.](#)
- If you open a call record by tapping any related item associated with the call record, then the work area displays the related item information. For more information, see [“Opening Records and Associated Related Items” on page 39.](#)

## Navigating Siebel Mobile Applications in Landscape Mode

Siebel Mobile applications work with a variety of mobile and tablet devices. If you are familiar with navigating iPad applications, then you will find that navigating Siebel Mobile applications is similar. The following procedure shows you how to navigate Siebel Mobile applications. This procedure assumes that your mobile device is in landscape mode.

### *To navigate Siebel Mobile applications in landscape mode*

- 1 Start the browser on your mobile device.
- 2 Enter the URL address for Siebel Mobile applications, and then log in to the application.

For information, see [“Logging In to Siebel Mobile Applications” on page 33](#). The home page for Siebel Mobile applications appears immediately after logging in, and it is the starting point for using Siebel Mobile applications. The following interface elements are present on the home page:

- **Application banner.** The application banner appears along the top of the home page, and it persists for all views.
- **Left pane.** The left pane displays list information according to the object that is selected on the application banner.
- **Right pane.** The right pane or work area displays the details for the selected record from the list in the left pane.

For more information about these user-interface elements, see [“Navigating Siebel Mobile Applications User Interface” on page 34](#).

- 3 To navigate away from the current list and record details view, tap another option on the application banner.  
For more information about the list and record details view, see [“Displaying the List and Record Details View” on page 39](#).
- 4 To open records and associated related items, see [“Opening Records and Associated Related Items” on page 39](#).
- 5 To search for records in Siebel Mobile applications, see [“Searching for Records” on page 45](#).
- 6 To create, modify, or delete records in Siebel Mobile applications, see the following:
  - [“Creating Records” on page 44](#)
  - [“Modifying Records” on page 45](#)
  - [“Deleting Records” on page 46](#)
- 7 To log out of Siebel Mobile applications, see [“Logging Out of Siebel Mobile Applications” on page 56](#).

## Navigating Siebel Mobile Applications in Portrait Mode

You navigate Siebel Mobile applications in portrait mode in much the same way as in landscape mode, except for the following differences:

- The home page displays only the application banner and the list view by default. That is, there is only one pane in portrait mode.
- When you tap a record from the list, the record details are displayed in full screen mode, minimizing the list view.
- To show the list view again, you must tap Back on the application banner.

The following procedure shows you how to navigate Siebel Mobile applications in portrait mode. This procedure assumes that your mobile device is in portrait mode.

### *To navigate Siebel Mobile applications in portrait mode*

- 1 Start the browser on your mobile device.
- 2 Enter the URL address for the Siebel Mobile application, and then log in to the application as shown in [“Logging In to Siebel Mobile Applications” on page 33](#).

The following interface elements are displayed on the home page of Siebel Mobile applications in portrait mode:

- **Application banner.** The application banner appears along the top of the home page, and persists for all views.
  - **Right pane.** The right pane or work area displays list information according to the object that is selected on the application banner.
- 3 To display the details for a record, tap that record in the list.

The record details are displayed in full screen mode, minimizing the list view (that is, the list view disappears). The first four or five fields in the record are displayed. To display any additional fields, tap Show More. The header bar typically displays the following: Menu button, New (+), and Edit icons.

The *related items* (or child objects) that can be associated with the record are displayed below the record details. For example, if you are using the Siebel Mobile application for Siebel Pharma, then the related items for Accounts are: Contacts, Calls, and Addresses. However, if you are using the Siebel Mobile application for Siebel Service, then the related items for Accounts are: Contacts, Service Requests, Assets, and Entitlements.

- 4 To open and review an associated related item, tap a related item below the record details.
- 5 To show the list view again, tap Back on the application banner.
- 6 To navigate to another list view, tap another option on the application banner.

## Displaying the List and Record Details View

The following procedure shows you how to display the list and record details view in Siebel Mobile applications.

### *To display the list and record details view*

- 1 Start the browser on your mobile device.
- 2 Enter the URL address for the Siebel Mobile application, and then log in to the application.  
For more information, see [“Logging In to Siebel Mobile Applications” on page 33](#). The Calls page displays the calls list and record details view by default as follows:
  - List information is displayed in the left pane.
  - Record details are displayed in the right pane or work area.  
The first four or five fields in the record are displayed. To display any additional fields, tap Show More.  
The *related items* (or child objects) that can be associated with the record are displayed below the record details. For example, if you are using the Siebel Mobile application for Siebel Pharma, then the related items for Accounts are: Contacts, Calls, and Addresses. However, if you are using the Siebel Mobile application for Siebel Service, then the related items for Accounts are: Contacts, Service Requests, Assets, and Entitlements.
- 3 To display the record details for a different record, tap another record in the list or tap the forward and back icons on the header bar in the work area.
- 4 To navigate away from the current list and record details view, tap another option on the application banner.
- 5 Open a record and the associated related items.  
For more information, see [“Opening Records and Associated Related Items” on page 39](#).

## Opening Records and Associated Related Items

The following procedure shows you how to open records and associated related items.

### *To open records and associated related items*

- 1 Start the browser on your mobile device.
- 2 Enter the URL address for the Siebel Mobile application, and then log in to the application as shown in [“Logging In to Siebel Mobile Applications” on page 33](#).  
If you are using the Siebel Mobile application for Siebel Pharma, for example, then the Calls page displays the list and record details view by default, as follows:
  - List information is displayed in the left pane.
  - Record details are displayed in the right pane or work area.

The *related items* (or child objects) that can be associated with the record are displayed below the record details. For example, if you are using the Siebel Mobile application for Siebel Pharma, then the related items for Accounts are: Contacts, Calls, and Addresses.

3 To open an account record and one of its associated related items, do the following:

- a Tap Accounts on the application banner, then a record in the Accounts list.
- b In the work area, tap for example the Addresses related item.

Account record details are now displayed in the left pane, and the details for the selected related item (in this case, Addresses) are now displayed in the work area as shown in [Figure 2](#).

- c To modify the related item, tap Edit on the header bar in the work area.
- d To add a related item, tap the New (plus) icon on the header bar in the work area.
- e To navigate to a different related item, tap the related item under the record details in the left pane.

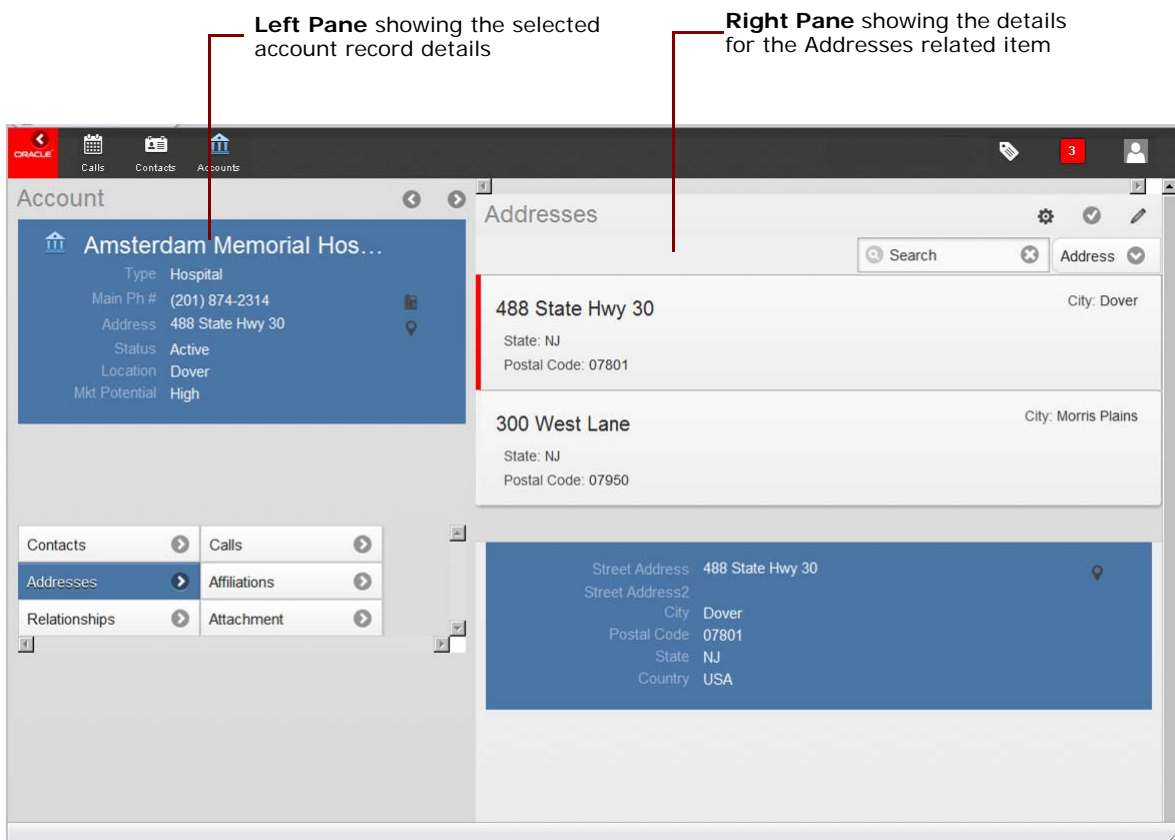


Figure 2. Siebel Mobile Connected Application: Account Record Details and Related Addresses



## Using the Back Button on the Application Banner

The Back button, which is a white left arrow in a black circle, on the application banner in Siebel Mobile applications is provided to go back to the previous screen or view. For the Back button to work correctly by returning to the previous page each time you tap Back on the application banner, you must ensure that the title of every view in the Siebel Mobile application is mentioned when configuring the Back button in Siebel Tools.

### *To use the Back button*

- Tap Back to return to the previous page view.

## Selecting Fields, Drop-Down Lists, and Records

When selecting fields, drop-down lists, and records in Siebel Mobile, you can perform the following actions:

- Tap an editable field in your Siebel Mobile application to automatically display one of the following, according to the field type: drop-down list, text box, or date selector.

A star icon beside a field name indicates that the field is a required field. Some required fields have a default value, other required fields display an error if no value is entered.

- Tap anywhere on a drop-down list field to open the drop-down list.
- Select multiple options from an associated drop-down list.  
Tap once to select an option. Tap the same option again to deselect the option.
- Tap a record to open and display the record details.
- Tap a related item belonging to a record to open the related item.
- Close a dialog box by tapping anywhere outside the dialog box.
- Double-tapping is supported in Siebel Mobile.

For example, you can close a dialog box by double-tapping the selected entry in the dialog box.

## Inline Editing

Inline editing is supported in Siebel Mobile, and it must be configured for each applet in your mobile application. Provided that inline editing is configured for applets in your mobile application, you can do the following:

- Edit fields directly on List pages and on Detail pages without opening the Edit page for the record.
- Edit fields in tables, windows and dialog boxes, and in many linked records on main record Detail pages.

You cannot edit fields inline if any one of the following is true:

- If the field is read-only, then you cannot edit the field inline.
- If the field is a Status field under calls, then you cannot edit the field inline.
- If the field is a calculated field, then you cannot edit the field inline.

After you make an inline edit, then stepping off the record automatically saves the changes to the record. For more information about configuring inline editing for Siebel Mobile applications, see *Configuring Siebel Open UI*.

## Customizing Check Boxes

Check boxes can be configured to appear in one of the following formats in your mobile application:

- **As a regular check box.** Tap the check box to display a check mark. Tap the check box again to remove the check mark.
- **As a flip switch.** This is the default behavior. Tap or swipe the switch to display On. Tap or swipe the switch again to display Off.

For more information about customizing check boxes for Siebel Mobile applications, see *Configuring Siebel Open UI*.

## Data Display

For each applet in your mobile application, you can configure the data in the applet to display in list, tile, or tabular format. For more information about how to configure lists, tiles, and tables for Siebel Mobile application data, see *Configuring Siebel Open UI*.

## Show More and Show Less Icons

In edit mode, only the first four or five fields in a record are displayed by default in Siebel Mobile applications. Use the Show More icon to display additional information, and the Show Less icon to hide the information again. The Show More and Show Less icons are only visible in edit mode only. That is, provided the Edit icon is enabled for the form.

## Drilldown Icon

The drilldown icon, which is a white right arrow in a grey circle, can typically be used to open or drill down on records or fields in Siebel Mobile applications.

## Using the Calendar Feature

You can check the appointments for a selected date using the date in the Calls list header. The Calls list shows all appointments for today's date by default.

### *To use the calendar feature*

- 1 Tap Calls on the application banner.

The Calls list for today's date is displayed by default.

- 2 Navigate to the date that you want by doing one of the following:

- Use the right and left arrows in the Calls list header to navigate to a future or previous date.
- Tap the date in the Calls list header, select the date that you want from the calendar that opens, and then tap Set.

The Calls list returns all appointments for the specified data.

## Running Predefined Queries

You can run a saved predefined query (if available) for some Siebel objects in Siebel Mobile applications, as shown in the following procedure.

### *To run a predefined query in Siebel Mobile applications*

- 1 Tap Accounts on the application banner.

The Accounts list is displayed in the left pane. Record details are displayed in the work area.

- 2 Tap PDQ display the list of saved predefined queries for the account object.

Scroll up and down the predefined query list that opens to find the query that you want to run.

- 3 Tap a predefined query in the list.

This step runs the predefined query, returning the appropriate data in the list view.

- 4 To close the predefined query list, tap PDQ on the application banner again.

## Managing Records in Siebel Mobile Applications

This topic contains the following information:

- ["Creating Records" on page 44](#)
- ["Linking Records to Your Selected Record" on page 44](#)
- ["Searching for Records" on page 45](#)
- ["Modifying Records" on page 45](#)

- [“Deleting Records” on page 46](#)
- [“Reviewing Record Summary Information” on page 46](#)
- [“Formatting the Columns to Display in the List View” on page 46](#)
- [“Displaying the Total Number of Records” on page 47](#)
- [“Creating Bookmarks” on page 48](#)
- [“Menu Button” on page 47](#)

## Creating Records

You can create a record from different areas within Siebel Mobile applications using the New (plus) icon or the Add (check mark) icon. When you create records, note the following about data entry:

- You can enter information directly into some fields, or select values from a drop-down list.
- When you tap some fields, another dialog box is displayed from which you can select values or enter values.
- For some fields that already have a value, you can tap an icon to the right of the field to display a window from which you can select values or enter values. The icons that you can tap are as follows:
  - **Phone icon.** Tap this icon to enter a contact telephone number in an iPad or to place a call to the number on iPhone.
  - **Email icon.** Tap this icon to start the native email client on your mobile device, which opens with an email addressed to the email address in this field.
  - **Pin icon.** Tap this icon to display location details. For more information, see [“Displaying Location Details” on page 48](#).
  - **URL icon.** Tap this icon to navigate to the destination address of the Web site in a new browser window.
- A star icon beside a field name indicates that the field is a required field.

### *To create records in Siebel Mobile applications*

- 1 From any page within your Siebel Mobile application, tap the New (plus) icon or the Add (check mark) icon.
- 2 Enter the details for the new record.
- 3 Tap Save or the check mark to save the record.

## Linking Records to Your Selected Record

You can link one record to another. Linking records gives you access to all related information from records that you view. For example, you can see a complete view of customer information by linking contacts, opportunities, and activities to an account record.

You can associate a single record (single association) to the record that you are working with or you can select multiple records (multiple associations) to link to the record that you are working with as follows:

- **Single associations** are supported in form and list views. For example, when associating an existing contact to an account in the Siebel Mobile application for Siebel Pharma, you can select the contact in the single-association popup window that opens.
- **Multiple associations** are supported in form and list views. For example, when creating an account call in the Siebel Mobile application for Siebel Pharma, you can select multiple contacts to attend a call using the Attendees related item. A multi association popup window opens when you tap Attendees, and you can select one or more contacts as required.

Search supports searches for values within a single-association or multiassociation popup window. This feature enables you to filter search results.

## Searching for Records

The following procedure shows you how to search for records in Siebel Mobile applications. By default, all searches are performed on the Name field. However, you can choose to filter your search for a different field as required.

### *To search for records*

- 1 Tap the Search bar.
- 2 If required, select a field to filter your search by tapping Name, and then choosing a different field.

For example, if you are searching the Calls list, then you can filter the Name, Status, Type, Address, and Start Date. If you are searching the Accounts list, then you can filter the Name, Site, Address, and Account Type.

- 3 Enter a search string, and then tap Go.

All records containing the search string are returned.

## Modifying Records

Use the following procedure to modify records in Siebel Mobile applications.

### *To modify records*

- 1 From any Detail page within Siebel Mobile applications, tap Edit.

**NOTE:** If inline editing is configured for your mobile application, then you can edit the record fields inline without tapping Edit. For more information see [“Inline Editing” on page 41](#).

- 2 Modify the record details as required.
- 3 Tap Save to save the record, or tap X to close the record without saving the changes.

## Deleting Records

The following procedure shows you how to delete records using the Calls list in Siebel Mobile applications, but the procedure to delete records is the same no matter where you are in the application.

### *To delete records*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 In the Calls list, swipe (from left to right) over the record that you want to delete, and then tap Delete.
- 3 Tap Yes when prompted for confirmation to delete the record.

## Reviewing Record Summary Information

Use the following procedure to review the summary information for a selected record.

### *To review record summary information in Siebel Mobile applications*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 In the Calls list, tap a record whose summary information you want to review.
- 3 Tap the Menu button, then About Record.

The summary information for the selected record is displayed and includes the following data:

- The date when the record was created and by whom
  - The last date the record was updated and by whom
  - The number of modifications that have been made to the record
- 4 Tap anywhere else on the screen to close the record summary information.

## Formatting the Columns to Display in the List View

Use the following procedure to specify the columns to appear in the list view and in what order. Up to a maximum of four columns appear in the list view in Siebel Mobile applications. If there are more than four columns defined for an object, then use Columns Displayed to order the list so that the columns that you want to appear in the list view are included at the top of the list. For example, if the following columns are defined in the following order for calls: Type, Status, Call Duration, Address, and Start Date, then complete the steps in the following procedure to hide the Call Duration column, and reorder the columns so that Status is the first column in the Calls list.

Note that Columns Displayed is available from the Menu button on list pages only. Columns Displayed is not available from the Menu button on detail pages.

***To format the columns to display in the list view***

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Tap the Menu button in the left pane, then Columns Displayed.
- 3 In the dialog box that opens, do the following:
  - a Use the left arrow and right arrow to move Call Duration from the Selected Columns to the Available Columns list.
  - b Use the up arrow and down arrow to reorder the Selected Columns list so that Status is the first item in the list, Type is second, Address is third, and Start Date is fourth.
  - c Tap Save when done.

**Displaying the Total Number of Records**

Use the following procedure to display the total number of records in the parent object.

***To review record summary information in Siebel Mobile applications***

- 1 Tap an object on the application banner.
- 2 Tap the Menu button in the list or work area, then Record Count.  
The total number of records in the parent object is displayed.
- 3 Tap anywhere else on the screen to close the record count information.

**Menu Button**

The Menu button, which is an icon that shows a cogwheel, in Siebel Mobile applications typically is displayed on all list and detail pages. The following options are typically available from the Menu button, but you can configure other options for the Menu button by using Siebel Tools as required.

- **About Record.** Use this option to display summary information about the selected record.  
For more information, see [“Reviewing Record Summary Information” on page 46](#).
- **Column Displayed.** Use this option to specify the columns to display in the record details view and the order to display the columns.  
For more information, see [“Formatting the Columns to Display in the List View” on page 46](#).
- **Create Bookmark.** Use this option to create a bookmark for the current page that you are on.  
For more information, see [“Creating Bookmarks” on page 48](#).
- **Record Count.** Use this option to display the total number of records in the parent object.  
For more information, see [“Displaying the Total Number of Records” on page 47](#).

For more information about configuring the Menu button for Siebel Mobile applications, see *Configuring Siebel Open UI*.

## Creating Bookmarks

Use the following procedure to create bookmarks for information that you want to return to later.

### *To create bookmarks for information in Siebel Mobile applications*

- 1 From any page within the Siebel Mobile application, tap the Menu button, and then Create Bookmark.

A dialog box opens and displays the URL address for the current page.

- 2 Copy the URL address, and save it elsewhere, for example, in an email.
- 3 Tap anywhere else on the screen to close the dialog box.

## Displaying Location Details

Global Positioning System (GPS) is integrated with Siebel Mobile applications so that when you tap the Pin icon, a map window opens showing the location details. The Pin icon must be configured in Siebel Tools. The Pin icon is available for address fields that have been completed and also on the header bar for calls (or activities) in the calls (or activities) list view. For information about setting up GPS for Siebel Mobile applications, see the topics about maps in *Configuring Siebel Open UI*.

You must have location services enabled on your mobile device to be able to use the Pin icon with Siebel Mobile applications. If the functionality for location services is not enabled on your mobile device, then the Pin icon is disabled.

## Displaying Location Details Using the Pin Icon in the Calls List Header Bar

The following procedure shows you how to display the location details for all calls in the Calls list by using the Pin icon in the Calls list header bar, but the procedure is the same when using the Pin icon in other list views.

### *To display the location details using the pin icon in the Calls list header bar*

- 1 Tap Calls on the application banner to display the Calls list for today's date.
- 2 In the Calls list, tap the Pin icon in the header bar.
- 3 If prompted, select Allow to enable Siebel Mobile to use the location of your mobile device.

A mini Google map opens at the bottom of the Calls list with pins pointing to the locations of all the calls in the Calls list. Note the following:

- The blue pin indicates the location of current user device (or browser).
- The red pins indicate the locations of all the calls that are displayed in the Calls list.
- Tapping any pin displays the account address information.



- 4 In the mini Google map, tap the New (plus) icon to open the location details in a new window from where you can, for example, obtain driving directions from your current location to the call location as shown in “[Displaying Location Details Using the Address Field Pin Icon](#)” on page 49
- 5 Tap X to close the mini Google map.

**NOTE:** Your Siebel Mobile application does not come with a license for Google Maps APIs. If you want to customize Google maps functionality using Google Maps APIs, then you must purchase a license. For more information about using Google maps, go to <https://support.google.com/maps/?hl=en>.

## Displaying Location Details Using the Address Field Pin Icon

Use the following procedure to display the location details by using the Pin icon next to a completed address field. The Pin icon is hidden for address fields that have not been completed or that do not have a postal code.

### *To display the location details using the address field Pin icon*

- 1 Tap Accounts on the application banner, then tap a record in the Accounts list.  
The account details are displayed in the work area.
- 2 Tap the Pin icon next to the address field in the work area.
- 3 If prompted, select Allow to enable Siebel Mobile to use the location of your mobile device.  
A Google map window opens listing the address and showing suggested locations for the address.
- 4 Navigate the Google map window as follows:
  - a Select the correct address location, and then tap the Pin icon in the Directions header bar to switch to a map with a pin pointing to the location of the address.  
  
Note that the letter B points to the location of the address. The letter A points to the location of the current mobile device. There is a blue pin next to A.
  - b Tap the Form icon in the Directions header bar to return to the address list page.
  - c Tap the By Car, Walking, or Bicycling icon as required to display appropriate directions about how to get to B from A.

## Using the Attachment Feature

The attachment feature allows you to keep supporting material for individual records. You can associate an attachment with individual account and contact records. If you edit files attached to a record, then your changes are saved when you step off the attachment record in the Siebel Mobile application.

## Attaching Files to Records Using the New File Button

The following procedure shows you how to attach files, such as, Microsoft Outlook email messages, Microsoft Word documents, and image files to an account or contact record using the New File button.

### *To attach a file to a record using the New File button*

- 1 Tap Accounts or Contacts on the application banner, and then tap a record in the respective list.  
The record details are displayed in the work area.
- 2 Attach an existing file as follows:
  - a Tap Attachment in the work area, and then tap New File.
  - b Tap Choose Existing, select an existing file to attach to the record, and then tap OK.
- 3 Attach a new photo or video as follows:
  - a Tap Attachment in the work area, and then tap New File.
  - b Tap Take Photo or Video, take an instant photo or record an instant video to attach to the record, and then tap OK.
- 4 Update an existing attached file as follows:
  - a Tap Attachment in the work area, and then tap the record that you want to update.
  - b Tap edit, update the file information as required, and then tap Save when finished.  
For example, you can change the name of the attached file and enter comments.
- 5 To open and view an existing attached file, tap the down arrow icon next to the attachment name.

## Attaching URLs to Records Using the New URL File Button

The following procedure shows you how to attach a URL to an account or contact record, using the New URL button.

### *To attach a URL to a record using the New URL button*

- 1 Tap Accounts or Contacts on the application banner, and then tap a record in the respective list.  
The record details are displayed in the work area.
- 2 Attach a URL as follows:
  - a Tap Attachment in the work area, and then tap New URL.
  - b Enter the URL address in the URL field, and then tap Add.
- 3 Update the details of an existing attached URL as follows:
  - a Tap Attachment in the work area, and then tap the URL record that you want to update.
  - b Tap edit, update the URL information as required, and then tap Save when finished.  
For example, you can change the URL address and enter comments.
- 4 To navigate to an existing URL address, tap the down arrow icon next to the URL address (attachment name).

## Starting an External Application

An external application can be configured in Siebel Tools for Siebel Mobile applications so that you can start it from within the mobile application. For example, you can link contacts to LinkedIn or Facebook so that you will be able to display a contact's LinkedIn or Facebook profile from within Siebel Mobile applications. The icon or URL link to start an external application appears on the details page in the work area of Siebel Mobile applications.

You use the Symbolic URL Administration view in Siebel Tools to specify how the HTTP request to the external application should be constructed and to define any arguments and values to be sent as part of the request. For more information about how to configure an external application to start from Siebel Mobile applications, see *Configuring Siebel Open UI* and the topic about defining symbolic URLs in *Siebel Portal Framework Guide*.

### *To start an external application from within a Siebel Mobile application*

- Tap the External Application URL link or icon on the details page in the work area.

## Reviewing Notification Messages

You can receive notification messages or message broadcasts from time to time. Message broadcasting provides a way for administrators, managers, and other users with access to the Message Broadcast view in Siebel CRM to send important information directly to user screens.

You can create new and modify existing notification messages by navigating to the Administration Communication screen, and then the Message Broadcast view in Siebel CRM. Administrators can also modify the code internally on either the client or server-side using the following APIs:

- **AddNotification.** Creates a notification and returns the Row\_Id of the notification.
- **DeleteNotification.** Deletes a notification using the Row\_Id.
- **UpdateNotification.** Updates a notification using the Row\_Id.
- **ReadNotification.** Returns the notification details using the Row\_Id.

For more information about these APIs, see *Configuring Siebel Open UI*.

You can review notification messages in your Siebel Mobile application by tapping the Notifications icon, which is a box with a number in it on the application banner. The number indicates the number of messages that are waiting for you to read. When there are zero messages, the box is dark-gray with a light-gray zero. If there is one or more messages waiting to be read, then the box displays the color of the highest priority unread message. If there is one message waiting to be read that has an Urgent with Alert severity, then the Notifications icon blinks; the Notifications icon stops blinking after the message is read. The Notifications icon does not blink if there are messages waiting to be read with only a Normal, High, or Urgent severity.

### *To review notification messages in Siebel Mobile applications*

- 1 Tap Notification on the application banner.

The Notification Summary list opens. Note the following:

- Messages that you have not read are white.
- A grayed-out message indicates that you have already read the message.
- A vertical line next to the message, which is color coded, indicates the severity level of messages, as shown in the following table.

Severity Level	Color of Vertical Line Next to Message
Normal	Grey
High	Yellow
Urgent	Red
Urgent with Alert	Red

The author of the message can mark the entire message with a severity level or mark only specific words.

- 2 Tap a message to open and review the details of the message.
- 3 Tap Close to close a message after you have read it.  
After you read a new message, the counter decrements on the Notification icon.
- 4 Tap X to remove a message from the Notification Summary list.

## Printing from Siebel Mobile Applications

You can print from Siebel Mobile applications, using the print option from your browser's Settings menu, provided that you have access to one of the following:

- A printer that is set up on the wireless network to which your mobile device is connected or a Bluetooth-enabled mobile printer
- A wireless printer that is compatible with and supports Apple's AirPrint™ technology

### *To print from Siebel Mobile applications*

- 1 With the page that you want to print displayed, tap the Settings icon in the browser navigation bar.

The following options are available from the browser's Settings menu:

- Add Bookmark
- Add to Reading List
- Add to Home Screen
- Mail Link to this Page
- Tweet
- Print

- 2 Tap Print, Select Printer, and then the name of your wireless printer.
- 3 Tap plus or minus to indicate the number of copies that you want to print.
- 4 Tap Print to start printing.

If you do not have an AirPrint-compatible wireless printer, then email a link of the page to yourself, open the link on your desktop computer, and print the page.

## Configuring Siebel Mobile Application Settings

You can configure Siebel Mobile application settings using the Photo icon. The Photo icon, which is a box with a generic photo in it on the application banner, displays the following information:

- The logged in user's photo if one has been uploaded to the user's profile settings on the Siebel Server. Otherwise, a generic photo is displayed.
- The logged in user's name and email address.
- The following options: Settings and Log Out.

Use the Log Out option to log out of the mobile application as shown in ["Logging Out of Siebel Mobile Applications" on page 56](#).

Use the Settings option to configure the behavior of your Siebel Mobile application, as shown in the following procedure. For example, you can set the startup view, navigation control, UI theme, and view transition for the mobile application.

- **Startup View.** The default startup view for Siebel Mobile applications varies according to the mobile application that you are using, but you can change the startup view as required.
- **Navigation Control.** The default navigation control for Siebel Mobile applications is Button Tablet, but you can change this to Launchpad Tablet as required, provided that Launchpad Tablet has been configured for your Siebel Mobile application. For more information, see *Configuring Siebel Open UI*.
- **Theme.** The default UI theme that is used by Siebel Mobile applications is Mobile Theme, but you can change this to a custom theme as required, provided that a custom theme has been configured for your Siebel Mobile application. For more information about creating a new mobile theme for Siebel Mobile applications, see *Configuring Siebel Open UI*.
- **Transition.** The default view transition that is set for Siebel Mobile applications is None, but you can change this to a custom view transition as required, provided that a custom view transition has been configured for your Siebel Mobile application. For more information about creating a new custom view transition for Siebel Mobile applications, see *Configuring Siebel Open UI*.

*To configure Siebel Mobile application settings*

- 1 Tap the Photo icon on the application banner, and then select the Settings option.
- 2 On the page that opens, tap Edit, and complete the fields shown in the following table as required.

Field	Description	Example Value
Startup View	Specifies the name of the view that will be displayed when the mobile application starts. Tap the Startup View drop-down list, and select a view.	Accounts - Calls (for Siebel Pharma)
Navigation Control	<p>Specifies whether to use the Button Tablet or Launchpad Tablet navigation control in the mobile application.</p> <ul style="list-style-type: none"> <li>■ <b>Button Tablet</b> indicates that the default navigation control for Siebel Mobile applications will be used. All available Siebel objects will be shown on the application banner, which persists for all views and appears at the top of the UI, as shown in <a href="#">Figure 1 on page 35</a>. Tapping a Siebel object on the application banner redirects you to a screen where you can manage the selected Siebel object.</li> <li>■ <b>Launchpad Tablet</b> indicates that the Site Map icon on the application banner will be used to navigate Siebel Mobile applications. All available Siebel objects will appear on the site map or home page as shown in <a href="#">Figure 3 on page 55</a>, and not on the application banner. The site map page displays when you initially log in to the mobile application and whenever you tap the Site Map icon on the application banner. Tapping a Siebel object on the site map page redirects you to a screen where you can manage the selected Siebel object.</li> </ul>	Launchpad Tablet
Theme	Specifies the UI theme that will be used throughout the mobile application. Tap the Theme drop-down list, and select a theme.	Mobile Theme
Transition	Specifies the view transition mode that will be used when moving from one view or applet to another view or applet in the mobile application. Tap the Transition drop-down list, and select a view transition.	Slide Left

Field	Description	Example Value
Confirm Before Deleting Record	<p>Specifies whether users are prompted for confirmation before deleting a record, as follows:</p> <ul style="list-style-type: none"> <li>■ <b>On</b> indicates to prompt users for confirmation.</li> <li>■ <b>Off</b> indicates not to prompt users for confirmation before deleting a record.</li> </ul> <p>Tap the Confirm Before Deleting Record button so that a check mark or On is displayed. Tap the button again so that an X or Off is displayed.</p>	On

3 Tap Save.

Figure 3 shows the site map page, which is available along with the Site Map icon on the application banner when Launchpad Tablet is configured for the Siebel Mobile application.

**Application Banner Icons:**

- Site Map
- Notification
- PDQ
- Photo



Figure 3. Siebel Mobile Application: Site Map Page

# Logging Out of Siebel Mobile Applications

This topic describes how to log out of Siebel Mobile applications.

## *To log out of Siebel Mobile applications*

- Tap the Photo icon on the application banner, and then tap Logout.



# 5

## Using the Siebel Mobile Application for Siebel Pharma

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Pharma can execute in online (connected) mode. It includes the following topics:

- [Checking the Calls for Today on page 57](#)
- [Managing Contacts on page 58](#)
- [Managing Accounts on page 64](#)
- [Conducting Customer Calls on page 69](#)
- [Recording Signatures for Calls on page 75](#)
- [Checking Validation Results on page 76](#)
- [Submitting Calls for Processing on page 77](#)

**NOTE:** When you tap an editable field in your Siebel Mobile application, the drop-down lists, text boxes, and date selectors appear automatically depending on the field type. A star icon beside a field name indicates that the field is a required field. Some required fields have a default value, other required fields display an error if no value is entered.

### Checking the Calls for Today

Using the date in the Calls list, you can check the appointments for today's date.

#### *To check the appointments for today*

- 1 Tap Calls on the application banner.  
The Calls list shows all appointments for today's date by default.
- 2 If required, navigate to a different date by doing one of the following:
  - Use the right and left arrow in the Calls list header to navigate to a future or previous date.
  - Tap the date in the Calls list header, select the date that you want from the calendar that opens, and then tap Set.The Calls list returns all appointments for the specified date.
- 3 Filter the information displayed in the Calls list as follows:
  - a Tap Name, then choose one of the following options to filter the calls list: Address, Status, Type, or Start Date.
  - b Tap the Search bar, enter a search string, and then tap Go.
- 4 Tap the Pin icon in the header bar of the Calls list to open a mini Google map below the Calls list with pins that point to the location of all calls that are planned for today's date.

For more information, see ["Displaying Location Details" on page 48](#).

## Managing Contacts

The following procedures describe how to plan and prepare for a contact call by using the Siebel Mobile connected application for Siebel Pharma:

- [“Displaying Contact Details” on page 58](#)
- [“Adding or Updating Contacts” on page 59](#)
- [“Adding or Updating Address Information for a Contact” on page 60](#)
- [“Adding or Updating Best Times for a Contact” on page 60](#)
- [“Adding or Updating the State License for a Contact” on page 61](#)
- [“Reviewing or Changing Affiliation Information for a Contact” on page 62](#)
- [“Reviewing or Changing Relationship Information for an Account” on page 68](#)
- [“Creating or Updating Calls for a Contact” on page 63](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

## Displaying Contact Details

You can display contact details by using the Contact list.

### *To display contact details*

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a contact in the list.

All contact details for the selected contact are displayed in the work area. The contact details include the information shown in the following table.

Item Name	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new contact. For more information, see <a href="#">“Adding or Updating Contacts” on page 59</a> .
Edit button	Use this button to edit the contact details. For more information, see <a href="#">“Adding or Updating Contacts” on page 59</a> .
Forward and Back buttons	Use this button to navigate to the next and previous contact record in the work area.
Contact Information	Includes information about the contact, such as the contact name, address, and email.

Item Name	Description
Related Lists	<p>Each contact can be associated with multiple calls, addresses, contact best times, and state licenses. The following related lists are available:</p> <ul style="list-style-type: none"> <li>■ <b>Calls.</b> Shows the calls from the team that are linked to the contact. If required, tap Calls to create a new contact call. For more information, see <a href="#">“Creating or Updating Calls for a Contact” on page 63.</a></li> <li>■ <b>Addresses.</b> Shows the address information for the contact. If required, tap Addresses to add a new contact address. For more information, see <a href="#">“Adding or Updating Address Information for a Contact” on page 60.</a></li> <li>■ <b>Best Time.</b> Shows the best time to call on the contact. This information enables you to track when a contact is available at a given location. If required, tap Best Time to add a new contact best time. For more information, see <a href="#">“Adding or Updating Best Times for a Contact” on page 60.</a></li> <li>■ <b>State Licenses.</b> Shows the state license information for the contact, typically, a physician or another health-care provider. If required, tap the State License to add a new contact state license. For more information, see <a href="#">“Adding or Updating the State License for a Contact” on page 61.</a></li> <li>■ <b>Affiliations.</b> Shows the affiliated accounts for the contact. For more information, see <a href="#">“Reviewing or Changing Affiliation Information for a Contact” on page 62.</a></li> <li>■ <b>Relationships.</b> Shows the type of relationship between contacts. For more information, see <a href="#">“Reviewing or Changing Relationship Information for a Contact” on page 62.</a></li> <li>■ <b>Attachments.</b> Shows the attachments (if there are any) for the contact. You can view and update existing attachments, add new file attachments, and add new URL attachments to contacts. For more information, see <a href="#">Using the Attachment Feature on page 49.</a></li> </ul>

## Adding or Updating Contacts

To add a new contact or update existing contact information, complete the following procedure.

### *To add a new or update an existing contact*

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Update the existing contact information as follows:
  - a Tap a contact in the Contacts list.  
All contact details for the selected contact are displayed in the work area.
  - b Tap Edit, update the information as required, and then tap Save when finished.

3 Add a new contact as follows:

- a Tap the plus (+) icon in the work area.
- b Enter the details for the new contact on the page that opens, then tap Save.

The following fields are required and must be completed when adding new contacts: First Name and Last Name.

## Adding or Updating Address Information for a Contact

Complete the following procedure to add or update contact address information.

### *To add or update address information for a contact*

1 Tap Contacts on the application banner to display the Contacts list.

2 Tap a contact in the list.

All contact details for the selected contact are displayed in the work area.

3 Update an existing contact address as follows:

- a Tap Addresses in the work area, then the address that you want to update.
- b Tap Edit, and update the address information as required.
- c Tap Save when finished.

4 Add a contact address as follows:

- a Tap Addresses in the work area, then tap Add.
- b Choose the address that you want to add from the dialog box that opens, then tap OK.

The address is added to the list of addresses for the contact.

5 Create a new contact address as follows:

- a Tap Addresses in the work area, Add, then the plus (+) icon on the dialog box that opens.
- b Enter the information for the new address, then tap Save.

The new address is added to the list of addresses for the contact.

## Adding or Updating Best Times for a Contact

To add or update the best time to call a contact, complete the following procedure. When you add this information, you can view when a contact is available at a given location. A contact, in this case, is typically a physician or another health-care provider.

**NOTE:** A contact best-time slot does not extend after 12:00 p.m. for a specific day. For example, if you create a contact best-time slot for a contact from 9:00-11:00 p.m., and if you change it to start at 11:00 p.m., then the slot does not extend to the next day. The contact best-time slot starts at 11:00 p.m. and ends at 12:00 p.m., as opposed to 1:00 a.m. the next day.

***To add or update contact best times for the contact***

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a contact in the list.  
All contact details for the selected contact are displayed in the work area.
- 3 Update an existing contact best time as follows:
  - a Tap Best Time in the work area, and then tap the record that you want to update.
  - b Tap Edit, update the information as required, and then tap Save when finished.
- 4 Add a new contact best time as follows:
  - a Tap Best Time in the work area, and then the plus (+) icon.
  - b Enter the information for the new contact best time, and then tap Save.  
The following fields are required: Address, Start Day, Start Time, and End Time.

## Adding or Updating the State License for a Contact

To add or update state license information for a contact, typically a physician, complete the following procedure.

***To add or update license information for a contact***

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a contact in the list.  
All contact details for the selected contact are displayed in the work area.
- 3 Update an existing contact state license as follows:
  - a Tap State Licenses in the work area, then the license that you want to update.
  - b Tap Edit, update the information as required, and then tap Save when finished.
- 4 Add a new contact state license as follows:
  - a Tap State Licences in the work area, then the plus (+) icon.
  - b Enter the information for the new contact state license on the page that opens. The following table describes the fields.

Field Name	Description
License Number	The license number for the contact, for example, PS4231732.
State	The U.S. state or jurisdiction associated with the license number. Use the drop-down list to select the state, for example, NJ for New Jersey. If your jurisdiction is not in the United States, then this field is not required.
License Status	The status of the license (Active or Inactive). Choose a status.

Field Name	Description
License Expiry Date	The date when the license expires (MM/DD/YYYY). Tap the date to display the calendar, and then select the expiration date.

- Tap Save.

## Reviewing or Changing Affiliation Information for a Contact

You can review and change the affiliated account information for a contact. One reason to establish affiliations is for call-reporting purposes. Affiliations between accounts and contacts can also be established by using Accounts.

### *To review or change the affiliation information for a contact*

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a contact in the list.  
All contact details for the selected contact are displayed in the work area.
- 3 To review or change the affiliated account information for the contact, tap Affiliations.
- 4 On the Affiliations page that opens, review and update the information as required.
  - Tap Edit to edit an existing affiliated account.
  - Tap the plus (+) icon to add a new affiliated account:
    - Specify the Account Type for the account. This is a required field.
    - Specify a Start Date. This is a required field.
    - Tap Save to save the affiliated account information.

## Reviewing or Changing Relationship Information for a Contact

You can specify the relationship or role that exists between contacts.

### *To review or change the relationship information for a contact*

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a contact in the list.  
All contact details for the selected contact are displayed in the work area.
- 3 To review the relationship information for the selected contact, tap Relationships.

- 4 On the Relationships page that opens, review and update the information as required:
  - Tap Edit to edit an existing contact relationship.
  - Tap Add to add a new contact relationship for the selected contact.
  - Specify the relationship type.
  - Tap Save to save the information.

## Creating or Updating Calls for a Contact

Complete the following procedure to create or update calls for a contact. You can update only calls that have not been submitted for processing.

### *To create or update calls for a contact*

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a contact in the list.  
All contact details for the selected contact are displayed in the work area.
- 3 Update an existing contact call as follows:
  - a Tap Calls in the work area, then the call that you want to update.
  - b Tap Edit in the work area, update the information as required, then tap Save when finished.
- 4 Create a new contact call as follows:
  - a Tap Calls in the work area, then the plus (+) icon.
  - b Enter the information for the new contact call as shown in the following table.

Field Name	Description
Contact	The contact associated with this call.
Address	This field is populated with the contact's primary address information when you select the Contact for the call. To select a different address, tap the address field, and select a record from the pick applet.
Start Date	The call start date and time. This field is required if you are creating a new contact call.
Call Duration	The duration of the call.
Comments	Enter any comments, as required.
Call Type	The type of call. Select an option from the Call Type drop-down list.

- c Tap Save to save the call.

## Managing Accounts

The following procedures describe how to plan and prepare for an account call using the Siebel Mobile application for Siebel Pharma:

- [“Displaying Account Details” on page 64](#)
- [“Adding or Updating Accounts” on page 65](#)
- [“Adding or Updating Contacts for an Account” on page 66](#)
- [“Adding or Updating Address Information for an Account” on page 66](#)
- [“Creating or Updating Calls for an Account” on page 67](#)
- [“Reviewing or Changing Affiliation Information for an Account” on page 67](#)
- [“Reviewing or Changing Relationship Information for an Account” on page 68](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

## Displaying Account Details

You can display account details by using the Accounts list.

### *To display account details*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.

All account details for the selected account are displayed in the work area. The account details include the information shown in the following table.

Item Name	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new account. For more information, see <a href="#">“Adding or Updating Accounts” on page 65</a> .
Edit button	Use this button to edit the account details. For more information, see <a href="#">“Adding or Updating Accounts” on page 65</a> .
Forward and Back buttons	Use to navigate to the next and previous account record in the work area.
Account Information	Includes information about the account, such as the account name, address, and email.



Item Name	Description
Related Lists	<p>Each account can be linked to multiple contacts, calls, and addresses. The following related lists are available for accounts:</p> <ul style="list-style-type: none"> <li>■ <b>Contacts.</b> Shows the contacts linked to the account. If required, tap Contacts to add a new account contact. For more information, see <a href="#">“Adding or Updating Contacts for an Account” on page 66.</a></li> <li>■ <b>Addresses.</b> Shows the address information for the account. If required, tap Addresses to add a new account address. For more information, see <a href="#">“Adding or Updating Address Information for an Account” on page 66.</a></li> <li>■ <b>Calls.</b> Shows the calls from the team that are linked to the account. If required, tap Calls to create a new account call. For more information, see <a href="#">“Creating or Updating Calls for an Account” on page 67.</a></li> <li>■ <b>Affiliations.</b> Shows the affiliated contacts for the account. For more information, see <a href="#">“Reviewing or Changing Affiliation Information for an Account” on page 67.</a></li> <li>■ <b>Relationships.</b> Shows the relationship that exists between this account and other accounts. For more information, see <a href="#">“Reviewing or Changing Relationship Information for an Account” on page 68.</a></li> <li>■ <b>Attachments.</b> Shows the attachments (if there are any) for the account. You can view and update existing attachments, add new file attachments, and add new URL attachments to accounts. For more information, see <a href="#">Using the Attachment Feature on page 49.</a></li> </ul>

## Adding or Updating Accounts

To add a new account or update existing account information, complete the following procedure.

### *To add a new or update an existing account*

- 1 Tap Account on the application banner to display the Accounts list.
- 2 Update the existing account information as follows:
  - a Tap an account in the Accounts list.  
All account details for the selected account are displayed in the work area.
  - b Tap Edit in the work area, update the information as required, and then tap Save when finished.
- 3 Add a new account as follows:
  - a Tap the plus (+) icon in the work area.
  - b Enter the details for the new account on the page that opens, then tap Save.  
Required fields which must be completed when adding new accounts are: Name, and Type.

## Adding or Updating Contacts for an Account

Complete the following procedure to add or update contacts for an account.

### *To add or update contacts for an account*

- 1** Tap Accounts on the application banner to display the Accounts list.
- 2** Tap an account in the list.  
All account details for the selected account are displayed in the work area.
- 3** Update an existing account contact as follows:
  - a** Tap Contacts in the work area, and then tap the contact that you want to update.
  - b** Tap Edit, and update the contact information as required.
  - c** Tap Save when finished.

## Adding or Updating Address Information for an Account

Complete the following procedure to add or update account address information.

### *To add or update address information for an account*

- 1** Tap Accounts on the application banner to display the Accounts list.
- 2** Tap an account in the list.  
All account details for the selected account are displayed in the work area.
- 3** Update an existing account address as follows:
  - a** Tap Addresses in the work area, then the address that you want to update.
  - b** Tap Edit, update the address information as required, and then tap Save when finished.
- 4** Add a new account address as follows:
  - a** Tap Addresses in the work area, then Add.
  - b** Choose the address that you want to add from the dialog box that opens, then tap Yes.  
The address is added to the list of addresses for the account.
- 5** Create a new account address as follows:
  - a** Tap Addresses in the work area, the Add icon, then the plus (+) icon on the dialog box that opens.
  - b** Enter the information for the new address, then tap Save.  
The new address is added to the list of addresses for the account.

## Creating or Updating Calls for an Account

Complete the following procedure to create or update calls for an account.

### *To create or update calls for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.  
All account details for the selected contact are displayed in the work area.
- 3 Update an existing account call as follows:
  - a Tap Calls in the work area, then the call that you want to update.
  - b Tap Edit in the work area, update the information as required, and then tap Save when finished.
- 4 Create a new account call as follows:
  - a Tap Calls in the work area, then the plus (+) icon.
  - b Enter the information for the new account call on the page that opens, as shown in the following table.

Field Name	Description
Account	The account associated with this call.
Address	This field is populated with the account's primary address information when you select the Account for the call. To select a different address, tap the address field, and select a record from the pick applet.
Start Date	The call start date and time. This field is required if you are creating a new account call.
Call Duration	The duration of the call.
Comments	Enter any comments, as required.
Call Type	The type of call. Select an option from the Call Type drop-down list.

- c Tap Save to save the call.

## Reviewing or Changing Affiliation Information for an Account

You can review and change the affiliated contact information for an account. You can also specify the contact's primary specialty and whether the contact is a direct contact for the account.

### *To review or change the affiliation information for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.  
All account details for the selected account are displayed in the work area.
- 3 To review or change the affiliated contact information for the account, tap Affiliations.
- 4 Tap Edit to edit an existing affiliated contact or tap the plus (+) icon to add a new affiliated contact, as follows:
  - a Tap the Lookup icon next to Last Name to specify the contact.  
After you select the contact, the First Name and Email fields automatically display the contact first name and email address.
  - b Tap Start Date to change the start date as required.
  - c Enter the primary specialty for the contact in the Primary Speciality field.
  - d Select the Direct check box as required.
    - If the Direct check box is selected, then the profile data for that person is routed to all members of the team associated with the affiliated account.
    - If the Direct check box is not selected, then the profile data is routed only to members of the team assigned to the person.
  - e Tap Save.

## Reviewing or Changing Relationship Information for an Account

You can specify the relationship that exists between accounts.

### *To review or change the relationship information for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.  
All account details for the selected account are displayed in the work area.
- 3 To review or change the relationship information for the selected account, tap Relationships.
- 4 On the Relationships page that opens, review and update the information as required:
  - Tap Edit to edit an existing account relationship, update the information as required, and then tap Save when finished.
  - Tap the plus (+) icon to add a new account relationship for the selected account:
    - Specify the Relationship type.
    - Tap Save.

# Conducting Customer Calls

The Siebel Mobile application for Oracle's Siebel Pharma enables you to manage calls. This topic describes how to do the following:

- "Displaying Call Details" on page 69
- "Adding New or Updating Calls" on page 70
- "Working with Attendees for Account Calls" on page 71
- "Working with Promotional Items Dropped Records for Calls" on page 72
- "Working with Samples-Dropped Records for Calls" on page 73
- "Working with Product Details for Calls" on page 74
- "Recording Signatures for Calls" on page 75
- "Checking Validation Results" on page 76
- "Submitting Calls for Processing" on page 77

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

## Displaying Call Details

You can manage customer calls from the Call Details page. You can display call details for accounts and contacts, using the Calls list.

### *To display call details*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Tap a record in the Calls list.

All details for the selected call are displayed in the work area. The call details include the information shown in the following table.

Item Name	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">"Menu Button" on page 47</a>
New button	Use this button to create a new call. For more information, see <a href="#">"Adding New or Updating Calls" on page 70</a> .
Edit button	Use this button to edit the call details. For more information, see <a href="#">"Adding New or Updating Calls" on page 70</a> .
Forward and Back buttons	Use to navigate to the next and previous call record in the work area.

Item Name	Description
Sign button	Use this button to display the Signature page for the call to capture the signature for samples dropped off as required. For more information, see <a href="#">“Recording Signatures for Calls” on page 75</a> .
Submit button	Use this button to submit a call for processing. This button is not available after a call has been submitted. For more information, see <a href="#">“Submitting Calls for Processing” on page 77</a> .
Related Lists	<p>Each call can be associated with the following related call items:</p> <ul style="list-style-type: none"> <li>■ <b>Attendees.</b> Shows the number of people attending the account call. Attendees cannot be added for contact calls. For more information, see <a href="#">“Working with Attendees for Account Calls” on page 71</a>.</li> <li>■ <b>Promotional Items Dropped.</b> Shows the number of promotional item dropped records linked to the call. For more information, see <a href="#">“Working with Promotional Items Dropped Records for Calls” on page 72</a>.</li> <li>■ <b>Samples Dropped.</b> Shows the number of sample dropped records linked to the contact call. For more information, see <a href="#">“Working with Samples-Dropped Records for Calls” on page 73</a>.</li> <li>■ <b>Prod Detail.</b> Shows the Product Details page where the product details reviewed with a customer are maintained. For more information, see <a href="#">“Working with Product Details for Calls” on page 74</a>.</li> <li>■ <b>Validation Results.</b> Shows the validation results for the call. For more information, see <a href="#">“Checking Validation Results” on page 76</a>.</li> </ul>

## Adding New or Updating Calls

To add a new call or update existing call information, complete the following procedure.

### *To add new or update a call*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Add a new call as follows:
  - a Tap the plus (+) icon in the work area.
  - b Complete the fields in the following table as required.

**NOTE:** You must choose either a contact or an account to create the call, but not both.

Item Name	Description
Contact	The contact associated with the call. This field is required if you are creating a contact call.
Account	The account associated with the call. This field is required if you are creating an account call.

Item Name	Description
Address	The address of the contact associated with the call.  <b>NOTE:</b> For existing contacts or accounts for whom the call is created, when you select the contact for the call, this field is populated with the contact's primary address information. To select a different address, tap the address field, and select a record from the drop-down list.
Start Date	The date and start time for the call. The value in this field is the current date and time by default.
Call Duration	The call duration in minutes.

- c Tap Save.
- 3 Update an existing call as follows:
  - a Tap a call in the Calls list.  
All details for the selected call are displayed in the work area.
  - b Tap Edit, update the information as required, then Save when done.

## Working with Attendees for Account Calls

An *attendee* is an individual who is present on a given occasion for a meeting or a phone call.

### *To work with attendees for an account call*

- 1 Tap Calls on the application banner to display the Calls list.  
The Calls list for today's date is displayed by default.
- 2 Tap an account call in the Calls list.  
All details for the selected account call are displayed in the work area on the Call Details page. For more information about the call details page, see ["Displaying Call Details" on page 69](#).
- 3 Add attendees to the account call as follows:
  - a Tap Attendees in the work area, then the Add icon.  
The Attendees page opens showing the contacts available for selection, and it includes the following information: First Name, Last Name, Employee Flag, and Primary Specialty.
  - b Tap one or more contact records as required:
    - ❑ You can select or deselect multiple records by tapping the records.
    - ❑ Tap All Contacts to show all the contacts that are available.
    - ❑ Tap Affiliated Contacts to show only the affiliated contacts associated with the account.
  - c Tap OK when done selecting contacts.

## Working with Promotional Items Dropped Records for Calls

You can add, review, update, or remove promotional items dropped records for a contact call or attendee call with a status of In Progress before submitting the call for processing. Only promotional item products that meet the following criteria are available for dropping off at a customer location:

- The products have been allocated to the sales representative.
- The products are available in the sales representative inventory.
- The products are active on the current date.

### *To work with promotional items dropped records for a call*

- 1 Tap Calls on the application banner to display the Calls list.

The Calls list for today's date is displayed by default.

- 2 Tap a call in the Calls list.

All details for the selected call are displayed in the work area on the Call Details page. For more information about the call details page, see ["Displaying Call Details" on page 69](#).

- 3 Add new promotional items dropped records for the call as follows:

- a Tap Promotional Items Dropped in the work area, and then the Add icon.

The Promo Items page opens showing the promotional items that are available for dropping off at a customer location, and it includes the information shown in the following table.

Field Name	Description
Name	The name of the promotional item. This is a read-only field.
Quantity	The quantity of the promotional item to be distributed. This field is required if you are adding a new promotional item dropped line item for a call.
Max Qty	The maximum quantity of promotional items that sales representatives are allowed to drop off to a customer in the allocation period. This is a read-only field.
Available Qty	The amount of promotional item that is currently available to the sales representative. This is a read-only field.

- b Enter a value in the Quantity field for each promotional item that you want to drop off, and then tap OK.
- 4 Edit an existing record as follows:
  - a Select the promotional items dropped record.
  - b Tap Edit, update the Quantity field as required, then tap Save when finished.
- 5 To remove a record, swipe over the record that you want to delete, and then tap Delete.



## Working with Samples-Dropped Records for Calls

You can add, review, update, or remove the samples-dropped records for a contact call or an attendee call with a status of In Progress before submitting the call for processing. Only sample products that meet the following criteria are available for dropping off at a customer location:

- The products have been allocated to the sales representative.
- The products are available in the sales representative inventory.
- The products are active on the current date.

### *To work with samples-dropped records for a call*

- 1 Tap Calls on the application banner to display the Calls list.

The Calls list for today's date is displayed by default.

- 2 Tap a call in the Calls list.

All details for the selected call are displayed in the work area on the Call Details page. For more information about call details page, see [“Displaying Call Details” on page 69](#).

- 3 Add new samples-dropped records for the call as follows:

- a Tap Samples Dropped in the work area, and then Add.

The Sample Drops page opens showing the sample products that are available for dropping off at a customer location and includes the information shown in the following table.

Field Name	Description
Name	The product name. This is a read-only field.
Lot Number	The lot number. This is a read-only field.
Expiry Date	The date that the sample product expires. This is a read-only field.
Quantity	The quantity of the sample to be distributed. This field is required if you are adding a new samples-dropped line item for a call.

- b Enter a value in the Quantity field for each sample product that you want to drop off, and then tap OK.
- c Tap Edit to update an existing record as required, then tap Save when finished.
- d To remove a record, swipe over the record that you want to delete, and then tap Delete.

## Working with Product Details for Calls

You can add, review, update, or remove the product details for an account call before submitting the call for processing. Products are listed in ascending order of priority on the Products Detailed page. Only products with *indications* show up on the Products Detailed page. For example, *indications* record the purpose or therapeutic area for which a drug is designed. The administrator must create *product and indications combinations*. Otherwise, the products are not displayed in the Products Detailed page.

### To work with product details for a call

- 1 Tap Calls on the application banner to display the Calls list.

The Calls list for today's date is displayed by default.

- 2 Tap a call in the Calls list.

All details for the selected call are displayed in the work area on the Call Details page. For more information about call details page, see ["Displaying Call Details" on page 69](#).

- 3 Add new product detail records for the call as follows:

- a Tap Product Details in the work area, and then Add.

The Product Details page opens showing the product details that are available for selection and includes the information shown in the following table.

Field Name	Description
Product Name	The product name. This is a read-only field.
Priority	The priority that you want to attach to this record. This is a required field.
Indication	The purpose or therapeutic area for the product, which can be one of the following: Allergy, Asthma, Arrhythmia, Heart Failure, Syncope, and Other. This field is required if you are adding a new product detail line item for a call. This is a read-only field.

- b Tap the Priority field, then enter a numeric value.

This field is required.

- c Tap OK when finished.

- d Tap Edit to update an existing record as required, then tap Save when finished.

For example, update the Indication field as required. The Indication field is read-only when you are adding a new product detail line item for a call.

- e To remove a record, swipe over the record that you want to delete, and then tap Delete.

## Recording Signatures for Calls

After you have entered all the required information for a call, in particular the samples data, you can obtain the contact's signature to verify the receipt of the product samples. After a sample is dropped off and signed for, that record is locked, and you are unable to further edit or update the sample dropped record. For more information about recording signatures for calls, see the following topics:

- [Displaying the Signature Page on page 75](#)
- [Recording Electronic Signatures for Calls on page 76](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

### Displaying the Signature Page

You can display the Signature page for a call by tapping the Sign button.

#### *To display the Signature page*

- 1 Tap Calls on the application banner to display the Calls list.

The Calls list for today's date is displayed by default.

- 2 Tap a call in the list, then tap Sign in the work area.

The Signature page opens showing the contact and the samples-dropped information and includes the information shown in the following table.

Item Name	Description
Contact Information	Displays the contact name, address, and the date of the last visit.
Clear button	Use this button to clear the Signature input box.
Cancel button	Use this button to cancel the signature capture page and return to the selected Call.
Save button	Use this button to save the signature
Signature input box	Use this input box to capture the contact's signature.

- 3 Tap Save when the signature has been captured.

## Recording Electronic Signatures for Calls

Use the following task to electronically record signatures for calls.

### *To record signatures for calls electronically*

- 1 Tap Calls on the application banner to display the Calls list.  
The Calls list for today's date is displayed by default.
- 2 Tap a call in the list, then Sign in the work area.  
Review any samples-dropped line items already linked to the call in the samples list.
- 3 Capture the signature in the signature input box.
- 4 If required, tap Clear to clear the signature, and start again if you make a mistake.
- 5 Tap Save when finished.  
The electronic signature and all data linked to the call are saved. You can now submit the call for processing.

## Checking Validation Results

Before submitting a call for processing, check the validation results for any errors, and resolve the errors before proceeding with the call.

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

### *To check validation results for a call*

- 1 Tap Calls on the application banner to display the Calls list.  
The Calls list for today's date is displayed by default.
- 2 Tap a call in the Calls list.  
All details for the selected call are displayed in the work area on the Call Details page. For more information about call details page, see ["Displaying Call Details" on page 69](#).
- 3 Tap Sign or Submit as required to capture a signature for the call or submit the call for processing.  
Validation results are generated when you tap the Sign and Submit button for a call.
- 4 Tap Validation Results in the work area to check for any errors.  
The Validation Results page opens showing the validation messages for the call. For example, a warning message will be displayed if you have entered a value that exceeds the maximum quantity of product that you are allowed to drop off for a call.

## Submitting Calls for Processing

When you are satisfied that you have entered all the required information for a call and obtained the signature for samples dropped off, then you can submit the call for processing. Only calls that have a status of Planned or Signed can be submitted for processing. At least one dropped sample must be recorded for a call before you can submit the call for processing. After a call is submitted for processing, the call is locked, and you are unable to further edit or update the call.

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

### *To submit a call for processing*

- 1 Tap Calls on the application banner to display the Calls list.

The Calls list for today's date is displayed by default.

- 2 Tap a call in the list, and then tap Submit to submit the call for processing.

The status on the call changes to Submitted, and the call is locked. The sales representative's sample inventory is decreased according to the samples and promotional items dropped off on the call. The call is closed. You can review but you cannot edit the call details.



# 6

## Using the Siebel Mobile Application for Siebel Consumer Goods

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Consumer Goods can execute in online (connected) mode. It includes the following topics:

- [Performing Daily Tasks on page 79](#)
- [Performing Supplemental Tasks on page 81](#)
- [Managing Calls for Siebel Consumer Goods on page 81](#)
- [Managing Contacts for Siebel Consumer Goods on page 87](#)
- [Managing Accounts for Siebel Consumer Goods on page 91](#)
- [Managing Routes for Siebel Consumer Goods on page 97](#)
- [Managing Orders for Siebel Consumer Goods on page 99](#)
- [Managing Return Orders for Siebel Consumer Goods on page 101](#)

**NOTE:** When you tap an editable field in your Siebel Mobile application, the drop-down lists, text boxes, and date selectors appear automatically depending on the field type. A star icon beside a field name indicates that the field is a required field. Some required fields have a default value, other required fields display an error if no value is entered.

### Performing Daily Tasks

The following are tasks that a field representative typically performs during a workday. The tasks are presented in the approximate order in which a field representative would perform them.

- 1 Before you start your calls for the day, review and check the calls that are scheduled.  
For more information, see the following topics:
  - [“Checking the Calls for Today” on page 82](#)
  - [“Displaying Call Details” on page 82](#)
- 2 When you arrive at a call destination, review the call information, required activities, optional activities, and all other call related information.  
For more information, see the following topics:
  - [“Starting a Call” on page 80](#)
  - [“Adding or Updating the Activities for a Call” on page 84](#)
- 3 One of your assigned activities might be to conduct a retail audit or a merchandising audit.  
For more information, see the following topics:
  - [“Adding or Updating Retail Audit Information for a Call” on page 84](#)
  - [“Adding or Updating Merchandising Audit Information for a Call” on page 85](#)

- 4 After you have completed a retail audit, you can generate an order to restock the customer. When complete, the order is transmitted to the distributor for fulfillment.

For more information, see the following topics:

- [“Adding or Updating Orders for a Call” on page 86](#)
- [“Managing Orders for Siebel Consumer Goods” on page 99](#)

- 5 When done with the call, you can enter notes about the visit, and optionally defer any activity that could not be completed during this visit or enter assessment information for the call.

For more information, see the following topics:

- [“Ending the Call” on page 80](#)
- [“Adding or Updating Notes for a Call” on page 86](#)
- [“Adding or Updating Assessment Information for a Call” on page 87](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Starting a Call

To start a call, complete the following procedure.

### *To start a call*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Tap the record in the Calls list that you want to execute.  
All details for the selected call record are displayed in the work area. Review the details of the call, such as, planned duration.
- 3 Tap Start in the work area.
- 4 Tap Call Items in the work area, and review the assigned activities.
- 5 Review all related information for the call and update the related information as required.  
For more information about the related information for a call, see [“Managing Calls for Siebel Consumer Goods” on page 81](#).

## Ending the Call

To end a call, complete the following procedure.

### *To end a call*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Tap the record in the Calls list that you want to end.



All details for the selected call record are displayed in the work area.

- 3 Tap End in the work area.

## Performing Supplemental Tasks

Additional tasks that a field representative might perform throughout the day include the following:

- [“Adding or Updating Calls” on page 83](#)
- [“Adding or Updating Contacts” on page 89](#)
- [“Adding or Updating Accounts” on page 92](#)
- [“Managing Calls for Siebel Consumer Goods” on page 81](#)
- [“Managing Contacts for Siebel Consumer Goods” on page 87](#)
- [“Managing Accounts for Siebel Consumer Goods” on page 91](#)
- [“Managing Routes for Siebel Consumer Goods” on page 97](#)
- [“Managing Orders for Siebel Consumer Goods” on page 99](#)
- [“Managing Return Orders for Siebel Consumer Goods” on page 101](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Managing Calls for Siebel Consumer Goods

You can add new calls or edit existing calls. The following procedures related to calls and call management are included in this topic:

- [“Checking the Calls for Today” on page 82](#)
- [“Displaying Call Details” on page 82](#)
- [“Adding or Updating Calls” on page 83](#)
- [“Adding or Updating the Activities for a Call” on page 84](#)
- [“Adding or Updating Retail Audit Information for a Call” on page 84](#)
- [“Adding or Updating Merchandising Audit Information for a Call” on page 85](#)
- [“Adding or Updating Orders for a Call” on page 86](#)
- [“Adding or Updating Notes for a Call” on page 86](#)
- [“Adding or Updating Assessment Information for a Call” on page 87](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Checking the Calls for Today

The Calls list shows all appointments for today's date by default. Using the date in the Calls list header, you can check the appointments for a selected date.

### *To check the appointments for today*

- 1 Tap Calls on the application banner.

The Calls list for today's date is displayed by default.

- 2 If required, navigate to a different date by doing one of the following:

- Use the right arrow and left arrow in the Calls list header to navigate to a future or previous date.
- Tap the date in the Calls list header, select the date that you want from the calendar that opens, and then tap Set.

The Calls list returns all appointments for the specified date.

- 3 Filter the information displayed in the Calls list as follows:

- a Tap Name, then choose one of the following options to filter the calls list: Address, Status, Type, or Start Date.
- b Tap the Search bar, enter a search string, and then tap Go.

- 4 Tap the Pin icon in the header bar of the Calls list to open a mini Google map below the Calls list with pins that point to the location of all calls that are planned for today's date.

For more information, see ["Displaying Location Details" on page 48](#).

## Displaying Call Details

You can manage customer calls from the Call details page. You can display call details by using the Calls list.

### *To display call details*

- 1 Tap call on the application banner to display the Calls list.
- 2 Tap a record in the Calls list.

All details for the selected activity are displayed in the work area. The call details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">"Menu Button" on page 47</a> .

Item	Description
New button	Use this button to create a new call. For more information, see <a href="#">“Adding or Updating Calls” on page 83</a> .
Edit button	Use this button to edit the call details. For more information, see <a href="#">“Adding or Updating Calls” on page 83</a> .
Call Information	Includes information about the call, such as the account name, address, time, and description.
Related lists	<p>The following related lists are available for calls:</p> <ul style="list-style-type: none"> <li>■ <b>Call Items.</b> Shows the activities for a call. For more information, see <a href="#">“Adding or Updating the Activities for a Call” on page 84</a>.</li> <li>■ <b>Retail Audits.</b> Shows the retail audit information linked to the call. For more information, see <a href="#">“Adding or Updating Retail Audit Information for a Call” on page 84</a>.</li> <li>■ <b>Merchandising Audits.</b> Shows the merchandising audits linked to the call. For more information, see <a href="#">“Adding or Updating Merchandising Audit Information for a Call” on page 85</a>.</li> <li>■ <b>Orders.</b> Shows the orders linked to the call. For more information, see <a href="#">“Adding or Updating Orders for a Call” on page 86</a>.</li> <li>■ <b>Notes.</b> Shows the notes linked to the call. For more information, see <a href="#">“Adding or Updating Notes for a Call” on page 86</a>.</li> <li>■ <b>Assessments.</b> Shows the assessment information linked to the call. For more information, see <a href="#">“Adding or Updating Assessment Information for a Call” on page 87</a>.</li> </ul>

## Adding or Updating Calls

To add a new call or update existing call information, complete the following procedure.

### *To add or update a call*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Update the existing call information as follows:
  - a Tap a record in the Calls list.  
All details for the selected call are displayed in the work area.
  - b Tap Edit, update the information as required, and then tap Save when finished.
- 3 Add a new call as follows:
  - a Tap the plus (+) icon in the work area.
  - b Enter the details for the new call on the page that opens, then tap Save.

## Adding or Updating the Activities for a Call

To add a new activity or update existing activity information for a call, complete the following procedure.

### *To add or update an activity for a call*

- 1** Tap Calls on the application banner to display the Calls list.
- 2** Tap a record in the Calls list.
- 3** Update the existing activity information for the call as follows:
  - a** Tap Call Items in the work area, then an activity in the list.

Required activities have a check mark next to the Required field. Activities without the check mark are optional. You can filter the records displayed in the activity list as follows:

    - Tap Type, then choose one of the following options to filter the list: Priority, Description, Required, or Type.
    - Tap the Search bar, enter a search string, and then tap Go.
  - b** Tap Edit, update the information as required, and then tap Save when finished.
- 4** Add a new activity for a call as follows:
  - a** Tap Call Items in the work area, then the plus (+) icon in the activities work area.
  - b** Enter the details for the new activity on the page that opens, then tap Save.

## Adding or Updating Retail Audit Information for a Call

Complete the following procedure to add or update retail audit information for a call.

### *To add or update retail audit information for a call*

- 1** Tap Calls on the application banner to display the Calls list.
- 2** Tap a record in the Calls list.

All details for the selected call are displayed in the work area.
- 3** Update an existing retail audit record for the call as follows:
  - a** Tap Retail Audits in the work area, and then tap the record that you want to update.

You can filter the retail audit records list as follows:

    - Tap Product, then choose one of the following options to filter the list: Account Code, OOS, Facing number (#), or Product.
    - Tap the Search bar, enter a search string, and then tap Go.
  - b** Tap Edit, update the record as required, and then tap Save when finished.

- 4 Create a new retail audit record for the call as follows:
  - a Tap Retail Audits in the work area, then the plus (+) icon.
  - b Enter the information for the new retail audit record on the page that opens.  
For example, complete the following fields:
    - ❑ **OOS.** Indicate whether the product is out-of-stock.
    - ❑ **Shelf Stock.** Enter the quantity of the product on the shelf.
    - ❑ **Back Stock.** Enter the quantity of the product in the back room.
  - c Tap Save when finished.

## Adding or Updating Merchandising Audit Information for a Call

Complete the following procedure to add or update merchandising audit information for a call.

### *To add or update merchandising audit information for a call*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Tap a record in the Calls list.  
All details for the selected call are displayed in the work area.
- 3 Update an existing merchandising audit record for the call as follows:
  - a Tap Merchandising Audits in the work area, and then tap the record that you want to update.  
You can filter the merchandising audit records list as follows:
    - ❑ Tap Name, then choose one of the following options to filter the list: Type, Asset Name, Asset Number, or Name.
    - ❑ Tap the Search bar, enter a search string, and then tap Go.
  - b Tap Edit, and update the merchandising audit record as required.
  - c Tap Save when finished.
- 4 Create a new merchandising audit record for the call as follows:
  - a Tap Merchandising Audits in the work area, then the plus (+) icon.
  - b Enter the information for the new merchandising audit record on the page that opens.
  - c Tap Save when finished.

## Adding or Updating Orders for a Call

To add new or update existing order line item information for a call, complete the following procedure.

### *To add or update an order for a call*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Tap a record in the Calls list.  
All details for the selected call are displayed in the work area.
- 3 Review the existing order information for the call by tapping Orders in the work area.
- 4 Update any existing order line item by tapping the line item's field, update accordingly, and then tap Save when finished.

You can filter the order line items list as follows:

- Tap Product, then choose one of the following options to filter the list: Qty, List Price, Disc percent (%), or Product.
  - Tap the Search bar, enter a search string, and then tap Go.
- 5 Add a new order line item as follows:
    - a Tap the plus (+) icon in the Line Item list.
    - b Enter the information for the new line item on the page that opens.
    - c Tap Save when finished.

## Adding or Updating Notes for a Call

Complete the following procedure to add or update notes for a call.

### *To add or update notes for a call*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Tap a record in the Calls list.  
All details for the selected call are displayed in the work area.
- 3 Update an existing call note as follows:
  - a Tap Notes in the work area, and then tap the note that you want to update.  
You can filter the records in the notes list as follows:
    - Tap Note Type, then choose one of the following options to filter the list: Created By, Created, Note, or Note Type.
    - Tap the Search bar, enter a search string, and then tap Go.
  - b Tap Edit, update the note information as required, and then tap Save when finished.

- 4 Add a new note as follows:
  - a Tap Notes in the work area, then the plus (+) icon.
  - b Enter the information for the new note on the page that opens.
  - c Tap Save when finished.

## Adding or Updating Assessment Information for a Call

Complete the following procedure to add or update the assessment information for a call.

### *To add or update the assessment information for a call*

- 1 Tap Calls on the application banner to display the Calls list.
- 2 Tap a record in the Calls list.

All details for the selected call are displayed in the work area.
- 3 Update existing assessment information as follows:
  - a Tap Assessments in the work area, and then the assessment record that you want to see.
  - b Edit the attributes for the assessment as required as follows:
    - Tap the lookup icon in the Value field.
    - Choose a value from the attribute list that opens, then tap OK.
- 4 Add a new assessment record as follows:
  - a Tap Assessments in the work area, then the plus (+) icon.
  - b Enter the information for the new assessment on the page that opens.
  - c Tap Save when finished.

## Managing Contacts for Siebel Consumer Goods

*Contacts* are individuals with whom your company conducts business or expects to conduct business in the future. Contacts can be employees of other companies, independent consultants, vendors, or acquaintances. This topic contains the following information:

- [“Displaying Contact Details” on page 88](#)
- [“Adding or Updating Contacts” on page 89](#)
- [“Adding or Updating Addresses for a Contact” on page 89](#)
- [“Adding or Updating Best Times for a Contact” on page 90](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Contact Details

You can display contact details by using the Contact list.

### *To display contact details*

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a record in the Contacts list.

All details for the selected contact are displayed in the work area. The contact details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">"Menu Button" on page 47</a> .
New button	Use this button to create a new contact. For more information, see <a href="#">"Adding or Updating Contacts" on page 89</a> .
Edit button	Use this button to edit the contact details. For more information, see <a href="#">"Adding or Updating Contacts" on page 89</a> .
Contact Information	Includes information about the contact, such as the contact name, phone number, and email.
Related lists	The following related lists are available for contacts: <ul style="list-style-type: none"><li>■ <b>Addresses.</b> Shows the address information for the contact. If required, tap Addresses to add a new contact address. For more information, see <a href="#">"Adding or Updating Addresses for a Contact" on page 89</a>.</li><li>■ <b>Best Times.</b> Shows the best time to call on the contact. This information enables you to track when a contact is available at a given location. If required, tap Best Time to add a new contact best time. For more information, see <a href="#">"Adding or Updating Best Times for a Contact" on page 90</a>.</li></ul>



## Adding or Updating Contacts

To add a new contact or update existing contact information, complete the following procedure.

### *To add or update an existing contact*

- 1** Tap Contacts on the application banner to display the Contacts list.
- 2** Update the existing contact information as follows:
  - a** Tap a record in the Contacts list.  
All details for the selected contact are displayed in the work area.
  - b** Tap Edit, update the information as required, and then tap Save when finished.
- 3** Add a new contact as follows:
  - a** Tap the plus (+) icon in the work area.
  - b** Enter the details for the new contact on the page that opens, then tap Save.  
The following fields are required and must be completed when adding new contacts: First Name and Last Name.

## Adding or Updating Addresses for a Contact

Complete the following procedure to add or update contact addresses.

### *To add or update addresses for an account*

- 1** Tap Contacts on the application banner to display the Contacts list.
- 2** Tap a contact in the list.  
All details for the selected account are displayed in the work area.
- 3** Update an existing contact address as follows:
  - a** Tap Addresses in the work area, then the address that you want to update.  
You can filter the records displayed in the address list as follows:
    - Tap Street Address, then choose one of the following options to filter the list: City, State, Postal Code, or Street Address.
    - Tap the Search bar, enter a search string, and then tap Go.
  - b** Tap Edit, update the address information as required, and then tap Save when finished.
- 4** Add a contact address as follows:
  - a** Tap Addresses in the work area, then tap the Add (check mark) icon.
  - b** Choose the address that you want to add from the dialog box that opens, then tap OK.  
The address is added to the list of addresses for the contact.

- 5 Create a new contact address as follows:
  - a Tap Addresses in the work area, Add, then the plus (+) icon on the dialog box that opens.
  - b Enter the information for the new address, then tap Save.

The new address is added to the list of addresses for the contact.

## Adding or Updating Best Times for a Contact

To add or update the best time to call a contact, complete the following procedure. When you add this information, you can view when a contact is available at a given location. A contact, in this case, is typically a physician or another health-care provider.

**NOTE:** A contact best-time slot does not extend after 12:00 p.m. for a specific day. For example, if you create a contact best-time slot for a contact from 9:00-11:00 p.m., and if you change it to start at 11:00 p.m., then the slot does not extend to the next day. The contact best-time slot starts at 11:00 p.m. and ends at 12:00 p.m., as opposed to 1:00 a.m. the next day.

### *To add or update contact best times for the contact*

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a contact in the list.

All details for the selected contact are displayed in the work area.
- 3 Update an existing contact best time as follows:
  - a Tap Best Time in the work area, and then tap the record that you want to update.

You can filter the records displayed in the best times list as follows:

    - Tap Address, then choose one of the following options to filter the list: Day, Start Time, End Time, or Address.
    - Tap the Search bar, enter a search string, and then tap Go.
  - b Tap Edit, update the information as required, and then tap Save when finished.
- 4 Add a new contact best time as follows:
  - a Tap Best Time in the work area, and then the plus (+) icon.
  - b Enter the information for the new contact best time, and then tap Save.

# Managing Accounts for Siebel Consumer Goods

You can add new accounts or edit existing accounts. An account represents the relationship between your company and the companies or individuals with whom you do business. You can use the Account Details screen as the primary navigation tool for your customer interactions. The following procedures related to accounts and account management are included in this topic:

- [“Displaying Account Details” on page 91](#)
- [“Adding or Updating Accounts” on page 92](#)
- [“Adding or Updating Contacts for an Account” on page 93](#)
- [“Adding or Updating Addresses for an Account” on page 93](#)
- [“Adding or Updating Distribution Products for an Account” on page 94](#)
- [“Adding or Updating Calls for an Account” on page 95](#)
- [“Adding or Updating Notes for an Account” on page 95](#)
- [“Adding or Updating Orders for an Account” on page 96](#)
- [“Adding or Updating Retail Audit Information for an Account” on page 96](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Account Details

You can display account details by using the Accounts list.

### *To display account details*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap a record in the Accounts list.

All details for the selected account are displayed in the work area. The account details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new account. For more information, see <a href="#">“Adding or Updating Accounts” on page 92</a> .
Edit button	Use this button to edit the account details. For more information, see <a href="#">“Adding or Updating Accounts” on page 92</a> .

Item	Description
Account Information	Includes information about the account, such as the account name, account type, and status.
Related lists	<p>Each account can be linked to multiple contacts, opportunities, activities, and addresses. The following related lists are available for accounts:</p> <ul style="list-style-type: none"><li>■ <b>Contacts.</b> Shows the contacts linked to the account. For more information, see <a href="#">“Adding or Updating Contacts for an Account” on page 93.</a></li><li>■ <b>Addresses.</b> Shows the address information for the account. For more information, see <a href="#">“Adding or Updating Addresses for an Account” on page 93.</a></li><li>■ <b>Product Distribution.</b> Shows the products that are available for distribution. For more information, see <a href="#">“Adding or Updating Distribution Products for an Account” on page 94</a></li><li>■ <b>Calls.</b> Shows the calls linked to the account. For more information, see <a href="#">“Adding or Updating Calls for an Account” on page 95.</a></li><li>■ <b>Notes.</b> Shows the notes linked to the account. For more information, see <a href="#">“Adding or Updating Notes for an Account” on page 95.</a></li><li>■ <b>Orders.</b> Shows the orders linked to the account. For more information, see <a href="#">“Adding or Updating Orders for an Account” on page 96.</a></li><li>■ <b>Retail Audits.</b> Shows the retail audit information linked to the account. For more information, see <a href="#">“Adding or Updating Retail Audit Information for an Account” on page 96.</a></li></ul>

## Adding or Updating Accounts

To add a new account or update existing account information, complete the following procedure.

### *To add or update accounts*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Update the existing account information as follows:
  - a Tap a record in the Accounts list.

All details for the selected account are displayed in the work area.
  - b Tap Edit, update the information as required, and then tap Save when finished.

**3** Add a new account as follows:

- a** Tap the plus (+) icon in the work area.
- b** Enter the details for the new account on the page that opens, then tap Save.

The following fields are required and must be completed when adding new accounts: Name and Type. The default value for the Type field is Customer.

## Adding or Updating Contacts for an Account

Complete the following procedure to add or update contacts for an account.

### *To add or update contacts for an account*

**1** Tap Accounts on the application banner to display the Accounts list.

**2** Tap an account in the list.

All details for the selected account are displayed in the work area.

**3** Update an existing account contact as follows:

- a** Tap Contacts in the work area, and then tap the contact that you want to update.
- b** Tap Edit, and update the contact information as required.
- c** Tap Save when finished.

**4** Add an existing contact to the account as follows:

- a** Tap Contacts in the work area, then the Add (check mark) icon.
- b** Select the contact that you want to add, then tap OK.

**5** Create a new contact for the account as follows:

- a** Tap Contacts in the work area, then the plus (+) icon.
- b** Enter the information for the new contact on the page that opens.

The following fields are required and must be completed when adding new contacts: First Name and Last Name.

- c** Tap Save when finished.

## Adding or Updating Addresses for an Account

Complete the following procedure to add or update account addresses.

### *To add or update addresses for an account*

**1** Tap Accounts on the application banner to display the Accounts list.

- 2 Tap an account in the list.  
All details for the selected account are displayed in the work area.
- 3 Update an existing address as follows:
  - a Tap Addresses in the work area, and then tap the address that you want to update.
  - b Tap Edit, and update the address information as required.
  - c Tap Save when finished.
- 4 Add an existing address to an account as follows:
  - a Tap Addresses in the work area, then the Add (check mark) icon
  - b Select the address that you want to add from the dialog box that opens, then tap OK.
- 5 Create a new address as follows:
  - a Tap Addresses in the work area, Add, then the plus (+) icon on the dialog box that opens.
  - b Enter the information for the new address, then tap Save.  
The new address is added to the list of addresses for the contact.
  - c Tap Save when finished.

## Adding or Updating Distribution Products for an Account

Complete the following procedure to add or update distribution products for an account.

### *To add or update distribution products for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.  
All details for the selected account are displayed in the work area.
- 3 Update a product for distribution as follows:
  - a Tap Product Distribution in the work area, and then tap the product that you want to update.  
You can filter the records displayed in the product list as follows:
    - ❑ Tap Product, then choose one of the following options to filter the product list: Account Code, Dist. Code, Active, or Product.
    - ❑ Tap the Search bar, enter a search string, and then tap Go.
  - b Tap Edit, update the product information as required, and then tap Save when finished.
- 4 Add a new product for distribution for the account as follows:
  - a Tap Product Distribution in the work area, then the plus (+) icon.
  - b Enter the information for the new product on the page that opens.
  - c Tap Save when finished.

## Adding or Updating Calls for an Account

Complete the following procedure to add or update calls for an account.

### *To add or update calls for an account*

- 1** Tap Accounts on the application banner to display the Accounts list.
- 2** Tap an account in the list.  
All details for the selected account are displayed in the work area.
- 3** Update an existing account call as follows:
  - a** Tap Calls in the work area, and then tap the call that you want to update.
  - b** Tap Edit, and update the call information as required.
  - c** Tap Save when finished.
- 4** Create a new account call as follows:
  - a** Tap Calls in the work area, then the plus (+) icon.
  - b** Enter the information for the new call on the page that opens.
  - c** Tap Save when finished.

## Adding or Updating Notes for an Account

Complete the following procedure to add or update notes for an account.

### *To add or update notes for an account*

- 1** Tap Accounts on the application banner to display the Accounts list.
- 2** Tap an account in the list.  
All details for the selected account are displayed in the work area.
- 3** Update an existing account note as follows:
  - a** Tap Notes in the work area, and then tap the note that you want to update.  
You can filter the records displayed in the notes list as follows:
    - Tap Note Type, then choose one of the following options to filter the notes list: Created By, Created, Note, or Note Type.
    - Tap the Search bar, enter a search string, and then tap Go.
  - b** Tap Edit, and update the note information as required.
  - c** Tap Save when finished.

- 4 Create a new account note as follows:
  - a Tap Notes in the work area, then the plus (+) icon.
  - b Enter the information for the new note on the page that opens.
  - c Tap Save when finished.

## Adding or Updating Orders for an Account

Complete the following procedure to add or update orders for an account.

### *To add or update orders for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.

All details for the selected account are displayed in the work area.
- 3 Update an existing account order as follows:
  - a Tap Orders in the work area, and then tap the order that you want to update.

You can filter the records displayed in the order list as follows:

    - Tap Order number (#), then choose one of the following options to filter the order list: Date, Type, Account, or Order number (#).
    - Tap the Search bar, enter a search string, and then tap Go.
  - b Tap Edit, and update the order information as required.
  - c Tap Save when finished.
- 4 Create a new order for the account as follows:
  - a Tap orders in the work area, then the plus (+) icon.
  - b Enter the information for the new order on the page that opens.
  - c Tap Save when finished.

## Adding or Updating Retail Audit Information for an Account

Complete the following procedure to add or update retail audit information for an account.

### *To add or update the retail audit information for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.

All details for the selected account are displayed in the work area.



- 3 Update an existing retail audit record for the account as follows:
  - a Tap Retail Audits in the work area, and then tap the retail audit record that you want to update.  
You can filter the records displayed in the list as follows:
    - Tap Product, then choose one of the following options to filter the list: Account Code, OOS, Facing number (#), or Product.
    - Tap the Search bar, enter a search string, and then tap Go.
  - b Tap Edit, and update the retail audit record as required.
  - c Tap Save when finished.
- 4 Create a new retail audit record for the account as follows:
  - a Tap Retail Audits in the work area, then the plus (+) icon.
  - b Enter the information for the new retail audit record on the page that opens.  
For example, complete the following fields:
    - **OOS.** Indicate whether the product is out-of-stock.
    - **Shelf Stock.** Enter the quantity of the product on the shelf.
    - **Back Stock.** Enter the quantity of the product in the back room.
  - c Tap Save when finished.

## Managing Routes for Siebel Consumer Goods

You can review route details, and add new or edit existing route account information for routes. The following procedures related to routes and route management are included in this topic:

- ["Displaying Route Details" on page 97](#)
- ["Adding or Updating Route Account Information for Routes" on page 98](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

### Displaying Route Details

You can display and review route details by using the Routes list. The route details indicate the sales representative locations and which accounts a sales representative is scheduled to visit.

#### *To display route details*

- 1 Tap Routes on the application banner to display the Routes list.

- 2 Tap a route in the list.

All details for the selected route are displayed in the work area. The route details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Not applicable.
Edit button	Not applicable.
Order Information	Includes information about the route, such as the route name, start day, sales person, and whether or not the route is active.
Related lists	Each order can be linked to multiple route accounts. For more information, see <a href="#">“Adding or Updating Route Account Information for Routes” on page 98</a> .

## Adding or Updating Route Account Information for Routes

Complete the following procedure to add or update route account information for a route.

### *To add or update route account information for a route*

- 1 Tap Routes on the application banner to display the Routes list.
- 2 Tap a record in the Routes list.

All details for the selected route are displayed in the work area.
- 3 Update existing route account information as follows:
  - a Tap Route Accounts in the work area, and then tap the account record that you want to update.

You can filter the records displayed in the account list as follows:

    - Tap Account, then choose one of the following options to filter the list: Call Time, Call Duration, Last Call, Address, or Account.
    - Tap the Search bar, enter a search string, and then tap Go.
  - b Tap Edit, and update the information as required.
  - c Tap Save when finished.
- 4 Add new route account information as follows:
  - a Tap Route Accounts in the work area, then the plus (+) icon.
  - b Enter the information for the new account on the page that opens.
  - c Tap Save when finished.

# Managing Orders for Siebel Consumer Goods

You can add, edit, and review orders. An order is a commitment on the part of the customer to purchase products and services at a specific price. Orders can be generated by sales people, call center agents and sales administrators. The following procedures related to orders and order management are included in this topic:

- [“Displaying Order Details” on page 99](#)
- [“Adding or Updating Orders” on page 100](#)
- [“Adding or Updating Product Line Items for an Order” on page 101](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Order Details

You can display order details by using the Orders list.

### *To display order details*

- 1 Tap Orders on the application banner to display the Orders list.
- 2 Tap a record in the Orders list.

All details for the selected order record are displayed in the work area. The order details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new order. For more information, see <a href="#">“Adding or Updating Orders” on page 100</a> .
Edit button	Use this button to edit the order details. For more information, see <a href="#">“Adding or Updating Orders” on page 100</a> .
Order Information	Includes information about the order, such as the order name, order number, discount, and state.
Related lists	Each order can be linked to multiple line items. For more information, see <a href="#">“Adding or Updating Product Line Items for an Order” on page 101</a> .

## Adding or Updating Orders

To add a new order or update existing order information, complete the following procedure.

### *To add or update an order*

- 1 Tap Orders on the application banner to display the Orders list.
- 2 Update the existing order as follows:
  - a Tap an order in the Orders list.

All details for the selected order are displayed in the work area.
  - b Tap Edit, update the information as required, and then tap Save when finished.
- 3 Add a new order as follows:
  - a Tap the plus (+) icon in the work area.
  - b Enter the details for the new order on the page that opens,

The following fields are filled in automatically:

    - ❑ Order number (#)
    - ❑ Order Date
    - ❑ Type
    - ❑ **Avail Credit.** This field fills in after you choose an account.
    - ❑ **Location.** This field fills in after you choose an account.
    - ❑ **State.** This field fills in after you choose an account.

Complete the remaining fields:

    - ❑ **Status.** Choose a status from the drop-down list.
    - ❑ **Discount %.** If applicable, choose a discount from the drop-down list.
    - ❑ **Account.** Tap the icon at the right edge of the field to choose an existing account.
    - ❑ **Price List.** Tap the icon at the right edge of the field to choose a price list.
    - ❑ **Pymt Mthd.** Choose a payment method from the drop-down list.
    - ❑ **Tax List.** Choose a tax list from the drop-down list.
  - c Tap Save when finished.
- 4 Add or update product line items for the order as required.

For more information, see ["Adding or Updating Product Line Items for an Order"](#) on page 101.

## Adding or Updating Product Line Items for an Order

Complete the following procedure to add or update line items for an order.

### *To add or update product line items for an order*

- 1** Tap Orders on the application banner to display the Orders list.
- 2** Tap a record in the Orders list.  
All details for the selected order record are displayed in the work area.
- 3** Update an existing product line item as follows:
  - a** Tap the line item's field, and update accordingly.  
You can edit the following fields: Product, Qty, List Price, or Disc percent (%).  
You can filter the records displayed in the line item list as follows:
    - ❑ Tap Product, then choose one of the following options to filter the list: Qty, Disc percent (%), or Product.
    - ❑ Tap the Search bar, enter a search string, and then tap Go.
  - b** Tap Save when finished.
- 4** Add a new product line item for the order as follows:
  - a** Tap the plus (+) icon in the Line Item list.
  - b** Enter the information for the new line item on the page that opens.
  - c** Tap Save when finished.

## Managing Return Orders for Siebel Consumer Goods

You can add, edit, and review return orders. The following procedures related to return orders and return order management are included in this topic:

- ["Displaying Return Order Details" on page 102](#)
- ["Adding or Updating Return Orders" on page 102](#)
- ["Adding or Updating Product Line Items for Return Orders" on page 103](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Return Order Details

You can display return details by using the Return Order list.

### *To display return details*

- 1 Tap Returns on the application banner to display the Return Orders list.
- 2 Tap a record in the Return Orders list.

All details for the selected return order record are displayed in the work area. The details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">"Menu Button" on page 47</a> .
New button	Use this button to create a new return order record. For more information, see <a href="#">"Adding or Updating Return Orders" on page 102</a> .
Edit button	Use this button to edit an existing return order record details. For more information, see <a href="#">"Adding or Updating Return Orders" on page 102</a> .
Return Information	Includes information about the return order, such as the order name, order number, discount, and state.
Related lists	Each return order record can be linked to multiple line items. For more information, see <a href="#">"Adding or Updating Product Line Items for Return Orders" on page 103</a> .

## Adding or Updating Return Orders

To add a new return order record or update an existing return order record, complete the following procedure.

### *To add or update a return order*

- 1 Tap Returns on the application banner to display the Return Order list.
- 2 Update an existing return order record as follows:
  - a Tap a record in the Return Order list.

All details for the selected return order record are displayed in the work area.
  - b Tap Edit, update the information as required, and then tap Save when finished.

- 3 Add a new return order record as follows:
  - a Tap the plus (+) icon in the work area.
  - b Enter the details for the new return order record on the page that opens.  
The following fields fill in automatically for new return orders:
    - Order number (#)
    - Status
    - Order Date
  - c Tap Save when finished.
- 4 Add or update product line items for the return order as required.  
For more information, see ["Adding or Updating Product Line Items for Return Orders" on page 103](#).

## Adding or Updating Product Line Items for Return Orders

Complete the following procedure to add or update product line items for a return order.

### *To add or update product line items for a return order*

- 1 Tap Returns on the application banner to display the Return Order list.
- 2 Tap a record in the Return Order list.  
All details for the selected return order record are displayed in the work area.
- 3 Update an existing product line item as follows:
  - a Tap the line item's field, and update accordingly.  
You can edit the following fields: Product, Qty, List Price, or Disc percent (%).  
You can filter the records displayed in the line item list as follows:
    - Tap Product, then choose one of the following options to filter the list: Qty, Disc percent (%), or Product.
    - Tap the Search bar, enter a search string, and then tap Go.
- 4 Add a new product line item for the return order as follows:
  - a Tap the plus (+) icon in the Line Item list.
  - b Enter the information for the new line item on the page that opens.
  - c Tap Save when finished.





# 7

## Using the Siebel Mobile Application for Siebel Sales

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Sales can execute in online (connected) mode. It includes the following topics:

- [“Managing Accounts for Siebel Sales” on page 105](#)
- [“Managing Contacts for Siebel Sales” on page 110](#)
- [“Managing Leads for Siebel Sales” on page 114](#)
- [“Managing Opportunities for Siebel Sales” on page 116](#)
- [“Managing Quotes for Siebel Sales” on page 121](#)
- [“Managing Orders for Siebel Sales” on page 125](#)
- [“Managing Activities for Siebel Sales” on page 127](#)

**NOTE:** When you tap an editable field in your Siebel Mobile application, the drop-down lists, text boxes, and date selectors appear automatically depending on the field type. A star icon beside a field name indicates that the field is a required field. Some required fields have a default value, other required fields display an error if no value is entered.

### Managing Accounts for Siebel Sales

An account represents the relationship between your company and the companies or individuals with whom you do business. You can use the Account Details screen as the primary navigation tool for your customer interactions.

The following procedures related to accounts and account management are included in this topic:

- [“Displaying Accounts” on page 106](#)
- [“Adding or Updating Accounts” on page 107](#)
- [“Adding or Updating Contacts for an Account” on page 107](#)
- [“Adding or Updating Opportunities for an Account” on page 108](#)
- [“Adding or Updating Addresses for an Account” on page 108](#)
- [“Adding or Updating Activities for an Account” on page 109](#)
- [“Adding or Updating Account Team Information for an Account” on page 110](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Accounts

You can display account details by using the Accounts list.

### *To display accounts*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.

All account details for the selected account are displayed in the work area. The account details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new account. For more information, see <a href="#">“Adding or Updating Accounts” on page 107</a> .
Edit button	Use this button to edit the account details. For more information, see <a href="#">“Adding or Updating Accounts” on page 107</a> .
Account Information	Includes information about the account, such as the account name, account type, and status.
Related lists	Each account can be linked to multiple contacts, opportunities, activities, and addresses. The following related lists are available for accounts: <ul style="list-style-type: none"><li>■ <b>Contacts.</b> Shows the contacts linked to the account. If required, tap Contacts to add a new account contact. For more information, see <a href="#">“Adding or Updating Contacts for an Account” on page 107</a>.</li><li>■ <b>Opportunities.</b> Shows the opportunities linked to the account. If required, tap Opportunities to add a new opportunity. For more information, see <a href="#">“Adding or Updating Opportunities for a Contact” on page 112</a>.</li><li>■ <b>Addresses.</b> Shows the address information for the account. If required, tap Addresses to add a new address. For more information, see <a href="#">“Adding or Updating Addresses for an Account” on page 108</a>.</li><li>■ <b>Activities.</b> Shows the activities linked to the account. If required, tap Activities to add a new activity. For more information, see <a href="#">“Adding or Updating Activities for an Account” on page 109</a>.</li><li>■ <b>Account Team.</b> Shows the Account Team linked to the account. If required, tap Account Team to add a new position to the Account Team. For more information, see <a href="#">“Adding or Updating Account Team Information for an Account” on page 110</a>.</li></ul>

## Adding or Updating Accounts

To add a new account or update existing account information, complete the following procedure.

### *To add or update accounts*

- 1** Tap Accounts on the application banner to display the Accounts list.
- 2** Update the existing Account information as follows:
  - a** Tap an account in the Accounts list.

All account details for the selected account are displayed in the work area.
  - b** Tap Edit, update the information as required, and then tap Save when finished.
- 3** Add a new Account as follows:
  - a** Tap the plus (+) icon in the work area.
  - b** Enter the details for the new account on the page that opens, then tap Save.

The following fields are required and must be completed when adding new accounts: Name and Type. The default value for the Type field is Customer.

## Adding or Updating Contacts for an Account

Complete the following procedure to add or update contacts for an account.

### *To add or update contacts for an account*

- 1** Tap Accounts on the application banner to display the Accounts list.
- 2** Tap an account in the list.

All account details for the selected account are displayed in the work area.
- 3** Create a new contact for the account as follows:
  - a** Tap Contacts in the work area, then the plus (+) icon.
  - b** Enter the information for the new account contact on the New Contact page.

The following fields are required and must be completed when adding new contacts: First Name and Last Name.
  - c** Tap Save when finished.
- 4** Add an existing contact to an account as follows:
  - a** Tap Contacts in the work area, then the Add (check mark) icon.
  - b** Select the contact that you want to add, then tap the Add icon.
  - c** Tap Save when finished.

- 5 Update an existing account contact as follows:
  - a Tap Contacts in the work area, and then tap the contact that you want to update.
  - b Tap Edit, and update the contact information as required.
  - c Tap Save when finished.

## Adding or Updating Opportunities for an Account

Complete the following procedure to add or update Opportunities for an account.

### *To add or update opportunities for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.

All account details for the selected account are displayed in the work area.
- 3 Create a new account opportunity as follows:
  - a Tap Opportunities in the work area, then the plus (+) icon.
  - b Enter the information for the new Opportunities on the New Opportunities page.

The following fields are required and must be completed when adding new opportunities:  
Name, Close Date, and Opportunity Currency.
  - c Tap Save when finished.
- 4 Update an existing opportunity as follows:
  - a Tap Opportunities in the work area, and then tap the opportunity that you want to update.
  - b Tap Edit, and update the opportunity information as required.
  - c Tap Save when finished.

## Adding or Updating Addresses for an Account

Complete the following procedure to add or update account addresses.

### *To add or update addresses for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.

All account details for the selected account are displayed in the work area.

- 3 Create a new account address as follows:
  - a Tap Addresses in the work area, then the plus (+) icon.
  - b Enter the information for the new address on the New Addresses page.  
The City field is the only required field and must be completed when adding new addresses.
  - c Tap Save when finished.
- 4 Add an existing address to an account as follows:
  - a Tap Addresses in the work area, then the Add (check mark) icon
  - b Select the Address that you want to add, then tap the Add icon.
  - c Tap Save when finished.
- 5 Update an existing address as follows:
  - a Tap Addresses in the work area, and then tap the address that you want to update.
  - b Tap Edit, and update the address information as required.
  - c Tap Save when finished.

## Adding or Updating Activities for an Account

Complete the following procedure to add or update account activities.

### *To add or update activities for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.  
All account details for the selected account are displayed in the work area.
- 3 Create a new account activity as follows:
  - a Tap Activities in the work area, then the plus (+) icon.
  - b Enter the information for the new activity on the New Activities page.  
The Type field is required and must be completed when adding new activities.
  - c Tap Save when finished.
- 4 Update an existing activity as follows:
  - a Tap Activities in the work area, and then tap the activity that you want to update.
  - b Tap Edit, and update the activity information as required.
  - c Tap Save when finished.

## Adding or Updating Account Team Information for an Account

Complete the following procedure to add or update account team information for an account.

### *To add or update account team information for an account*

- 1 Tap Accounts on the application banner to display the Accounts list.
- 2 Tap an account in the list.  
All account details for the selected account are displayed in the work area.
- 3 Add a position to an account team as follows:
  - a Tap Account Team in the work area, then the Add (check mark) icon.
  - b Select the position that you want to add, then tap the Add icon.
  - c Tap Save when finished.
- 4 Update the primary or the role of the position in an existing account team as follows:
  - a Tap Account Team in the work area, and then tap the position that you want to update.
  - b Tap Edit, and update the account team information as required.
  - c Tap Save when finished.

## Managing Contacts for Siebel Sales

*Contacts* are individuals with whom your company conducts business or expects to conduct business in the future. Contacts can be employees of other companies, independent consultants, vendors, or acquaintances. This topic contains the following information:

- ["Displaying Contact Details for Siebel Sales" on page 111](#)
- ["Adding or Updating Contacts" on page 111](#)
- ["Adding or Updating Opportunities for a Contact" on page 112](#)
- ["Adding Contact Team Information for a Contact" on page 113](#)
- ["Adding or Updating Addresses for a Contact" on page 113](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Contact Details for Siebel Sales

You can display contact details by using the Contact list.

### To display contact details

- 1 Tap Contacts in the application banner to display the Contacts list.
- 2 Tap a contact in the list.

All contact details for the selected contact are displayed in the work area. The contact details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new contact. For more information, see <a href="#">“Adding or Updating Contacts” on page 111</a> .
Edit button	Use this button to edit the contact details. For more information, see <a href="#">“Adding or Updating Contacts” on page 111</a> .
Contact Information	Includes information about the contact, such as the contact name, phone number, and email.
Related lists	Each account can be linked to multiple opportunities and addresses. The following related lists are available for contacts: <ul style="list-style-type: none"> <li>■ <b>Opportunities.</b> Shows the opportunities for the contact. If required, tap Opportunities to add a new opportunity. For more information, see <a href="#">“Adding or Updating Opportunities for a Contact” on page 112</a>.</li> <li>■ <b>Contact Team.</b> Shows the contact team for the contact. If required, tap Contact Team to add a new position to the contact team. For more information, see <a href="#">“Adding Contact Team Information for a Contact” on page 113</a>.</li> <li>■ <b>Addresses.</b> Shows the address information for the contact. If required, tap Addresses to add a new contact address. For more information, see <a href="#">“Adding or Updating Addresses for a Contact” on page 113</a>.</li> </ul>

## Adding or Updating Contacts

To add a new contact or update existing contact information, complete the following procedure.

### To add or update a contact

- 1 Tap Contacts in the application banner to display the Contacts list.

- 2 Update the existing Contact information as follows:
  - a Tap a contact in the Contacts list.

All contact details for the selected contact are displayed in the work area.
  - b Tap Edit, update the information as required, and then tap Save when finished.
- 3 Add a new contact as follows:
  - a Tap the plus (+) icon in the work area.
  - b Enter the details for the new contact on the page that opens, then tap Save.

The following fields are required and must be completed when adding new contacts: First Name and Last Name.

## Adding or Updating Opportunities for a Contact

Complete the following procedure to add or update opportunities for a contact.

### *To add or update opportunities for an account*

- 1 Tap Contacts on the application banner to display the Contacts list.
- 2 Tap a contact in the list.

All contact details for the selected contact are displayed in the work area.
- 3 Create a new contact opportunity as follows:
  - a Tap Opportunities in the work area, then the plus (+) icon.
  - b Enter the information for the new opportunities on the New Opportunities page.

The following fields are required and must be completed when adding new opportunities: Name, Currency, and Close Date.
  - c Tap Save when finished.
- 4 Add an existing contact opportunity as follows:
  - a Tap Opportunities in the work area, then the Add (check mark) icon.
  - b Select the opportunity that you want to add, then tap the Add (check mark) icon.
  - c Tap Save when finished.
- 5 Update an existing opportunity as follows:
  - a Tap Opportunities in the work area, and then tap the opportunity that you want to update.
  - b Tap Edit, and update the opportunity information as required.
  - c Tap Save when finished.



## Adding Contact Team Information for a Contact

Complete the following procedure to add contact team information for a contact.

### *To add a contact team for a contact*

- 1** Tap Contacts on the application banner to display the Contacts list.
- 2** Tap a contact in the list.  
All Contact details for the selected contact are displayed in the work area.
- 3** Add an existing position to the contact team as follows:
  - a** Tap Contact Team in the work area, then the Add (check mark) icon.
  - b** Select the position that you want to add, then tap the Add (check mark) icon.
  - c** Tap Save when finished.

## Adding or Updating Addresses for a Contact

Complete the following procedure to add or update contact addresses.

### *To add or update addresses for an account*

- 1** Tap Contacts on the application banner to display the Contacts list.
- 2** Tap a contact in the list.  
All contact details for the selected account are displayed in the work area.
- 3** Create a new contact address as follows:
  - a** Tap Addresses in the work area, then the plus (+) icon.
  - b** Enter the information for the new address on the New Addresses page.  
The City field is the only required field and must be completed when adding new addresses.
  - c** Tap Save when finished.
- 4** Add an existing address to a contact as follows:
  - a** Tap Addresses in the work area, then the Add (check mark) icon.
  - b** Select the Address that you want to add, then tap the Add (check mark) icon.
  - c** Tap Save when finished.
- 5** Update an existing address as follows:
  - a** Tap Addresses in the work area, and then tap the address that you want to update.
  - b** Tap Edit, and update the address information as required.
  - c** Tap Save when finished.

# Managing Leads for Siebel Sales

A *lead* is a new prospect or existing customer who might become an opportunity. This topic includes the following information:

- [“Displaying Lead Details” on page 114](#)
- [“Adding and Updating Leads” on page 115](#)
- [“Adding or Updating Opportunities for a Lead” on page 115](#)
- [“Converting a Lead to an Opportunity” on page 116](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Lead Details

You can display lead details by using the Leads list.

### *To display lead details*

- 1 Tap leads in the application banner to display the Leads list.
- 2 Tap a lead in the list.

All lead details for the selected lead are displayed in the work area. The lead details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new lead. For more information, see <a href="#">“Adding and Updating Leads” on page 115</a> .
Edit button	Use this button to edit the contact details. For more information, see <a href="#">“Adding and Updating Leads” on page 115</a> .
Lead Information	Includes information about the lead, such as the lead name and address.
Related lists	The following related list is available for leads:  <b>Opportunities.</b> Shows the opportunities for the lead. If required, tap Opportunities to add a new opportunity. For more information, see <a href="#">“Adding or Updating Opportunities for a Lead” on page 115</a> and <a href="#">“Converting a Lead to an Opportunity” on page 116</a> .

## Adding and Updating Leads

To add a new lead or update existing lead information, complete the following procedure.

### *To add or update an existing lead*

- 1** Tap Leads in the application banner to display the Leads list.
- 2** Update the existing Lead information as follows:
  - a** Tap a lead in the Leads list.  
All lead details for the selected lead are displayed in the work area.
  - b** Tap Edit, update the information as required, and then tap Save when finished.
- 3** Add a new lead as follows:
  - a** Tap the plus (+) icon in the work area.
  - b** Enter the details for the new lead on the page that opens, then tap Save.  
The Description field is required and must be completed when adding new leads.

## Adding or Updating Opportunities for a Lead

Complete the following procedure to add or update opportunities for a lead.

### *To add or update opportunities for a lead*

- 1** Tap Leads on the application banner to display the Leads list.
- 2** Tap a lead in the list.  
All lead details for the selected lead are displayed in the work area.
- 3** Create a new lead opportunity as follows:
  - a** Tap Opportunities in the work area, then the plus (+) icon.
  - b** Enter the information for the new Opportunities on the New Opportunities page.  
The following fields are required and must be completed when adding new opportunities:  
Name, Close Date, and Opportunity Currency.
  - c** Tap Save when finished.
- 4** Update an existing opportunity as follows:
  - a** Tap Opportunities in the work area, and then tap the opportunity that you want to update.
  - b** Tap Edit, and update the opportunity information as required.
  - c** Tap Save when finished.

## Converting a Lead to an Opportunity

Complete the following procedure to convert an opportunity to a lead. When you convert a lead to an opportunity, an opportunity record is automatically created under the lead using data from the lead. For more information about converting leads to opportunities, see *Siebel Marketing User Guide*.

### *To convert a lead to an opportunity*

- 1 Tap Leads on the application banner to display the Leads list.
- 2 Tap a lead in the list that you want to convert to an opportunity.
- 3 Click Convert to convert the lead to an opportunity.

**NOTE:** Only a lead for a contact can be converted using the Convert button. If the lead is associated with a prospect, then you must promote the prospect to a contact before the lead can be converted.

## Managing Opportunities for Siebel Sales

An *opportunity* is defined as a potential revenue-generating event. An opportunity is usually associated with an account and one or more contacts, products, activities, and quotes. This topic includes the following information:

- ["Displaying Opportunities Details" on page 116](#)
- ["Adding and Updating Opportunities" on page 118](#)
- ["Adding or Updating Contacts for an Opportunity" on page 118](#)
- ["Adding or Updating Products for an Opportunity" on page 119](#)
- ["Adding or Updating Quotes for an Opportunity" on page 119](#)
- ["Creating Quotes Using the Auto Quote Button" on page 120](#)
- ["Adding or Updating Activities for an Opportunity" on page 120](#)
- ["Adding or Updating Opportunity Team Information for an Opportunity" on page 120](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Opportunities Details

You can display opportunities details by using the Opportunities list.

### *To display opportunities details*

- 1 Tap Opportunities in the application banner to display the Opportunities list.

2 Tap an opportunity in the list.

All opportunity details for the selected opportunity are displayed in the work area. The opportunity details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new opportunity. For more information, see <a href="#">“Adding and Updating Opportunities” on page 118</a> .
Edit button	Use this button to edit the opportunity details. For more information, see <a href="#">“Adding and Updating Opportunities” on page 118</a> .
Opportunity Information	Includes information about the opportunity, such as the opportunity name and currency.
Related lists	<p>Each opportunity can be linked to multiple contacts, products, and activities. The following related lists are available for opportunities:</p> <ul style="list-style-type: none"> <li>■ <b>Contacts.</b> Shows the contacts linked to the opportunity. If required, tap Contacts to add a new account contact. For more information, see <a href="#">“Adding or Updating Contacts for an Opportunity” on page 118</a>.</li> <li>■ <b>Products.</b> Shows the products linked to the opportunity. If required, tap Products to add a new product. For more information, see <a href="#">“Adding or Updating Products for an Opportunity” on page 119</a>.</li> <li>■ <b>Quotes.</b> Shows the quotes linked to the opportunity. If required, tap Quotes to add a new quote. For more information, see <a href="#">“Adding or Updating Quotes for an Opportunity” on page 119</a> and <a href="#">“Creating Quotes Using the Auto Quote Button” on page 120</a>.</li> <li>■ <b>Activities.</b> Shows the activities linked to the opportunity. If required, tap Activities to add a new opportunity activity. For more information, see <a href="#">“Adding or Updating Activities for an Opportunity” on page 120</a>.</li> <li>■ <b>Opportunity Team.</b> Shows the opportunity teams linked to the opportunity. If required, tap Opportunity Team to add a new position to the opportunity team. For more information, see <a href="#">“Adding or Updating Opportunity Team Information for an Opportunity” on page 120</a>.</li> </ul>

## Adding and Updating Opportunities

To add a new opportunity or update existing opportunity information, complete the following procedure.

### *To add or update an existing opportunity*

- 1** Tap Opportunities in the application banner to display the Opportunities list.
- 2** Update the existing opportunities information as follows:
  - a** Tap an opportunity in the Opportunities list.  
All opportunity details for the selected opportunity are displayed in the work area.
  - b** Tap Edit, update the information as required, and then tap Save when finished.
- 3** Add a new opportunity as follows:
  - a** Tap the plus (+) icon in the work area.
  - b** Enter the details for the new opportunity on the page that opens, then tap Save.

## Adding or Updating Contacts for an Opportunity

Complete the following procedure to add or update contacts for an opportunity.

### *To add or update contacts for an opportunity*

- 1** Tap Opportunities on the application banner to display the Opportunities list.
- 2** Tap an opportunity in the list.  
All opportunity details for the selected opportunity are displayed in the work area.
- 3** Create a new contact for the opportunity as follows:
  - a** Tap Contacts in the work area, then the plus (+) icon.
  - b** Enter the information for the new contact on the New Contacts page.
  - c** Tap Save when finished.
- 4** Add an existing contact to the opportunity as follows:
  - a** Tap Contacts in the work area, then the Add (check mark) icon.
  - b** Select the contact that you want to add, then tap the Add (check mark) icon.
  - c** Tap Save when finished.
- 5** Update an existing contact as follows:
  - a** Tap Contacts in the work area, and then tap the contact that you want to update.
  - b** Tap Edit, and update the contact information as required.
  - c** Tap Save when finished.

## Adding or Updating Products for an Opportunity

Complete the following procedure to add or update products for an opportunity.

### *To add or update products for an opportunity*

- 1** Tap Opportunities on the application banner to display the Opportunities list.
- 2** Tap an opportunity in the list.  
All opportunity details for the selected opportunity are displayed in the work area.
- 3** Add a product to the opportunity as follows:
  - a** Tap Products in the work area, then the plus (+) icon.
  - b** Enter the information for the new Product on the New Products page.
  - c** Tap Save when finished.
- 4** Update the details for an existing opportunity product as follows:
  - a** Tap Products in the work area, and then tap the product that you want to update.
  - b** Tap Edit, and update the product information as required.
  - c** Tap Save when finished.

## Adding or Updating Quotes for an Opportunity

Complete the following procedure to add or update quotes for an opportunity.

### *To add or update quotes for an opportunity*

- 1** Tap Opportunities on the application banner to display the Opportunities list.
- 2** Tap an opportunity in the list.  
All opportunity details for the selected opportunity are displayed in the work area.
- 3** Create a new opportunity quote as follows:
  - a** Tap Quotes in the work area, then the plus (+) icon.
  - b** Enter the information for the new Quote on the New Quotes page.
  - c** Tap Save when finished.
- 4** Update an existing quote as follows:
  - a** Tap Quotes in the work area, and then tap the quote that you want to update.
  - b** Tap Edit, and update the opportunity information as required.
  - c** Tap Save when finished.

## Creating Quotes Using the Auto Quote Button

Complete the following procedure to create a quote using the Auto Quote button. When you create a quote from an opportunity using the Auto Quote button, a quote record is automatically created under the opportunity using the data from the opportunity. Any opportunity products that have the Auto Quote flag checked are also copied to the quote record.

### *To create a quote using the Auto Quote button*

- 1 Tap Opportunities on the application banner to display the Opportunities list.
- 2 Tap an opportunity in the list that you want to convert to a quote.
- 3 Tap Quote in the work area, and then the Auto Quote button to create a quote.

## Adding or Updating Activities for an Opportunity

Complete the following procedure to add or update activities for an opportunity.

### *To add or update activities for an opportunity*

- 1 Tap Opportunities on the application banner to display the Opportunities list.
- 2 Tap an opportunity in the list.  
All opportunities details for the selected opportunity are displayed in the work area.
- 3 Create a new opportunity activity as follows:
  - a Tap Activities in the work area, then the plus (+) icon.
  - b Enter the information for the new activity on the New Activities page.
  - c Tap Save when finished.
- 4 Update an existing activity as follows:
  - a Tap Activities in the work area, and then tap the activity that you want to update.
  - b Tap Edit, and update the activity information as required.
  - c Tap Save when finished.

## Adding or Updating Opportunity Team Information for an Opportunity

Complete the following procedure to add or update opportunity team information for an opportunity.

### *To add or update opportunity team information for an opportunity*

- 1 Tap Opportunities on the application banner to display the Opportunities list.



- 2 Tap an opportunity in the list.  
All opportunity details for the selected opportunity are displayed in the work area.
- 3 Add a new position to the opportunity team as follows:
  - a Tap Opportunity Teams in the work area, then the Add (check mark) icon.
  - b Select the position to be added to the opportunity team.
  - c Tap Save when finished.
- 4 Update the primary or the role of the position in an existing opportunity team as follows:
  - a Tap Opportunity Team in the work area, and then tap the position that you want to update.
  - b Tap Edit, and update the opportunity team information as required.
  - c Tap Save when finished.

## Managing Quotes for Siebel Sales

Quotes include effective dates, price lists, and discounts used in pricing products and services. The following procedures related to quotes and quotes management are included in this topic:

- [“Displaying Quote Details” on page 121](#)
- [“Adding or Updating Quotes” on page 122](#)
- [“Adding or Updating Quote Items for a Quote” on page 123](#)
- [“Adding or Updating Orders for a Quote” on page 123](#)
- [“Creating Orders Using the Auto Order Button” on page 124](#)
- [“Adding or Updating Quote Team Information for a Quote” on page 124](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Quote Details

You can display quote details by using the Quotes list.

### *To display quote details*

- 1 Tap Quotes in the application banner to display the Quotes list.
- 2 Tap a quote in the list.

All quote details for the selected quote are displayed in the work area. The quote details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new quote. For more information, see <a href="#">“Adding or Updating Quotes” on page 122</a> .
Edit button	Use this button to edit the quote details. For more information, see <a href="#">“Adding or Updating Quotes” on page 122</a> .
Quote Information	Includes information about the quote, such as the quote name and quote number.
Related lists	<p>Each quote can be linked to multiple orders and quote items. The following related lists are available for quotes:</p> <ul style="list-style-type: none"> <li>■ <b>Quote Item.</b> Shows the quote items linked to the quotes. If required, tap Quotes Items to add a new quote item. For more information, see <a href="#">“Adding or Updating Quote Items for a Quote” on page 123</a>.</li> <li>■ <b>Orders.</b> Shows the orders linked to the quote. If required, tap Orders to add a new order. For more information, see <a href="#">“Adding or Updating Orders for a Quote” on page 123</a> and <a href="#">“Creating Orders Using the Auto Order Button” on page 124</a>.</li> <li>■ <b>Quote Team.</b> Shows the quote team linked to the quote. If required, tap Quote Team to add a new position to the quote team. For more information, see <a href="#">“Adding or Updating Quote Team Information for a Quote” on page 124</a>.</li> </ul>

## Adding or Updating Quotes

To add a new quote or update existing quote information, complete the following procedure.

### *To add or update an existing quote*

- 1 Tap Quotes in the application banner to display the Quotes list.
- 2 Update the existing quote information as follows:
  - a Tap a quote in the Quotes list.  
All quote details for the selected quote are displayed in the work area.
  - b Tap Edit, update the information as required, and then tap Save when finished.

- 3 Add a new Quote as follows:
  - a Tap the plus (+) icon in the work area.
  - b Enter the details for the new quote on the page that opens, then tap Save.

## Adding or Updating Quote Items for a Quote

Complete the following procedure to add or update quote items for a quote.

### *To add or update quote items for a quote*

- 1 Tap Quotes on the application banner to display the Quotes list.
- 2 Tap a quote in the list.

All quote details for the selected quote are displayed in the work area.
- 3 Create a new quote item for a quote as follows:
  - a Tap Quote Items in the work area, then the plus (+) icon.
  - b Enter the information for the new quote item on the New Quote Items page.

The Quantity field is required and must be completed when adding new quote items.
  - c Tap Save when finished.
- 4 Update an existing quote item as follows:
  - a Tap Quote Items in the work area, and then tap the quote item that you want to update.
  - b Tap Edit, and update the quote item information as required.
  - c Tap Save when finished.

## Adding or Updating Orders for a Quote

Complete the following procedure to add or update orders for a quote.

### *To add or update orders for a quote*

- 1 Tap Quotes on the application banner to display the Quotes list.
- 2 Tap a quote in the list.

All quote details for the selected quote are displayed in the work area.
- 3 Create a new quote order as follows:
  - a Tap Orders in the work area, then the plus (+) icon.
  - b Enter the information for the new orders on the New Orders page.
  - c Tap Save when finished.

- 4 Update an existing order as follows:
  - a Tap Orders in the work area, and then tap the order that you want to update.
  - b Tap Edit, and update the order information as required.
  - c Tap Save when finished.

## Creating Orders Using the Auto Order Button

Complete the following procedure to create an order using the Auto Order button. When you create an order from a quote using the Auto Order button, an order record is automatically created under the quote using data from the quote.

### *To create orders using the Auto Order button*

- 1 Tap Quotes on the application banner to display the Quotes list.
- 2 Tap a quote in the list that you want to convert to an order.
- 3 Tap Orders in the work area, and then the Auto Order button to create an order.

## Adding or Updating Quote Team Information for a Quote

Complete the following procedure to add or update quote team information for a quote.

### *To add or update quote team information for a quote*

- 1 Tap Quotes on the application banner to display the Quotes list.
- 2 Tap a quote in the list.

All quote details for the selected quote are displayed in the work area.
- 3 Add a new position to a quote team as follows:
  - a Tap Quote Teams in the work area, then the Add (check mark) icon.
  - b Select the position that you want to add, then tap the Add (check mark) icon.
  - c Tap Save when finished.
- 4 Update the primary position in an existing quote team as follows:
  - a Tap Quote Team in the work area, and then tap the position that you want to update.
  - b Tap Edit and select Primary.
  - c Tap Save when you are finished.

## Managing Orders for Siebel Sales

An order is a commitment on the part of the customer to purchase products and services at a specific price. Orders can be generated from quotes or created directly by sales people, call center agents and sales administrators. The following procedures related to orders and order management are included in this topic:

- [“Displaying Order Details” on page 125](#)
- [“Adding or Updating Orders” on page 126](#)
- [“Adding or Updating Line Items for an Order” on page 126](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

### Displaying Order Details

You can display order details by using the Orders list.

#### *To display order details*

- 1 Tap Orders in the application banner to display the Orders list.
- 2 Tap an order in the list.

All Order details for the selected order are displayed in the work area. The order details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new order. For more information, see <a href="#">“Adding or Updating Orders” on page 126</a> .
Edit button	Use this button to edit the order details. For more information, see <a href="#">“Adding or Updating Orders” on page 126</a> .
Order Information	Includes information about the order, such as the order name, order number, and status.
Related lists	Each order can be linked to multiple line items. For more information, see <a href="#">“Adding or Updating Line Items for an Order” on page 126</a>

## Adding or Updating Orders

To add a new order or update existing order information, complete the following procedure.

### *To add or update orders*

- 1** Tap Orders in the application banner to display the Orders list.
- 2** Update the existing Order information as follows:
  - a** Tap an order in the Orders list.  
All Order details for the selected order are displayed in the work area.
  - b** Tap Edit, update the information as required, and then tap Save when finished.
- 3** Add a new order as follows:
  - a** Tap the plus (+) icon in the work area.
  - b** Enter the details for the new order on the page that opens, then tap Save.

## Adding or Updating Line Items for an Order

Complete the following procedure to add or update line items for an order.

### *To add or update line items for an order*

- 1** Tap Orders on the application banner to display the Orders list.
- 2** Tap an order in the list.  
All order details for the selected order are displayed in the work area.
- 3** Create a new order line item as follows:
  - a** Tap Line Items in the work area, then the plus (+) icon.
  - b** Enter the information for the new line item on the New Line Items page.
  - c** Tap Save when finished.
- 4** Update an existing line item as follows:
  - a** Tap Line Items in the work area, and then tap the Line Item that you want to update.
  - b** Tap Edit, and update the line item information as required.
  - c** Tap Save when finished.

# Managing Activities for Siebel Sales

*Activities* are various tasks or events that are performed for contacts, accounts, and opportunities. The following procedures related to activities and activity management are included in this topic:

- [“Displaying Activities Details” on page 127](#)
- [“Adding or Updating Activities” on page 128](#)
- [“Adding or Updating Contacts for Activities” on page 128](#)
- [“Adding Employees for Activities” on page 129](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Sales.

## Displaying Activities Details

You can display activities details by using the Activities list.

### *To display activity details*

- 1 Tap Activities in the application banner to display the activities list.
- 2 Tap an activity in the list.

All activity details for the selected activity are displayed in the work area. The activity details include the information shown in the following table.

Item	Description
Menu button	The following options are available when you tap the Menu button: About Record, Record Count, and Create Bookmark. For more information about using the Menu button, see <a href="#">“Menu Button” on page 47</a> .
New button	Use this button to create a new activity. For more information, see <a href="#">“Adding or Updating Activities” on page 128</a> .
Edit button	Use this button to edit the activity details. For more information, see <a href="#">“Adding or Updating Activities” on page 128</a> .
Activity Information	Includes information about the activity, such as the owner name, priority, and end date.
Related lists	Each activity can be linked to multiple contacts and employees. The following related lists are available for activities: <ul style="list-style-type: none"> <li>■ <b>Contacts.</b> Shows the contacts linked to the activity. For more information, see <a href="#">“Adding or Updating Contacts for Activities” on page 128</a>.</li> <li>■ <b>Employees.</b> Shows the employees linked to the activity. For more information, see <a href="#">“Adding Employees for Activities” on page 129</a>.</li> </ul>

## Adding or Updating Activities

To add a new activity or update existing activity information, complete the following procedure.

### *To add or update an activity*

- 1** Tap Activities in the application banner to display the Activities list.
- 2** Update the existing activity information as follows:
  - a** Tap an activity in the Activities list.  
All activity details for the selected activity are displayed in the work area.
  - b** Tap Edit, update the information as required, and then tap Save when finished.
- 3** Add a new activity as follows:
  - a** Tap the plus (+) icon in the work area.
  - b** Enter the details for the new activity on the page that opens, then tap Save.

## Adding or Updating Contacts for Activities

Complete the following procedure to add or update contacts for an activity.

### *To add or update contacts for an activity*

- 1** Tap Activities on the application banner to display the Activities list.
- 2** Tap an activity in the list.  
All activity details for the selected activity are displayed in the work area.
- 3** Create a new contact as follows:
  - a** Tap Contacts in the work area, then the plus (+) icon.
  - b** Enter the information for the new Contact on the New Contacts page.  
The following fields are required and must be completed when adding new contacts: First Name and Last Name.
  - c** Tap Save when finished.
- 4** Add an existing contact as follows:
  - a** Tap Contacts in the work area, then the Add (check mark) icon.
  - b** Select the contact that you want to add, then tap the Add (check mark) icon.
  - c** Tap Save when finished.



- 5 Update an existing contact as follows:
  - a Tap Contacts in the work area, and then tap the contact that you want to update.
  - b Tap Edit, and update the contact information as required.
  - c Tap Save when finished.

## Adding Employees for Activities

Complete the following procedure to add employees for an activity.

### *To add employees for an activity*

- 1 Tap Activities on the application banner to display the Activities list.
- 2 Tap an Activity in the list.

All activity details for the selected activity are displayed in the work area.
- 3 Add an existing employee for an activity as follows:
  - a Tap Employees in the work area, then the Add (check mark) icon.
  - b Select the employee that you want to add, then tap the Add (check mark) icon.



# 8

## Using the Siebel Mobile Application for Siebel Field Service

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Field Service can execute in online (connected) mode. It includes the following topics:

- [Preparing to Start the Day on page 131](#)
- [Preparing for a Visit on page 133](#)
- [Performing a Job on page 134](#)
- [Closing the Visit on page 138](#)
- [Performing Miscellaneous Tasks on page 140](#)

**NOTE:** When you tap an editable field in your Siebel Mobile application, the drop-down lists, text boxes, and date selectors appear automatically depending on the field type. A star icon beside a field name indicates that the field is a required field. Some required fields have a default value, other required fields display an error if no value is entered.

### Preparing to Start the Day

Before starting your daily activities, do the following:

- [“Reviewing Activities” on page 131](#)
- [“Ordering Parts for an Activity” on page 132](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Field Service.

### Reviewing Activities

Before starting, review the details of the activities assigned for that day. After reviewing the activity list, you can accept or decline assigned activities.

#### *To review an activity*

- 1 Tap Activities on the application banner to display the Activities list.  
The Activities list shows the activities sorted in descending order of their planned start time.
- 2 Filter the information displayed in the Activities list as follows:
  - a Tap Account, then choose one of the following options to filter the activities list: Status, Planned Start, Planned End, Priority, or Account.
  - b Tap the Search bar, enter a search string, and then tap Go.

- 3 Tap the Pin icon in the header bar of the Activities list to open a mini Google map below the Activities list with pins that point to the location of all activities that are assigned.
- 4 In the mini Google map, tap the plus (+) icon to open the location details in a new window from where you can, for example, obtain route information or driving directions from your current location to the activity location.

For more information, see ["Displaying Location Details" on page 48](#).

- 5 Tap a record in the Activities list to display the details for the selected activity in the work area, including links for SR number (#), Asset number (#), Account Name, and a map icon.
- 6 Display the related information for a selected activity by tapping the following options as required in the work area:
  - Contacts
  - Recommended Parts & Tools
  - Instructions
  - Steps
  - Part Tracker
  - Time Tracker
  - Expense Tracker
  - Invoices

## Ordering Parts for an Activity

Before going on a customer visit, verify and order any required parts and tools for the visit.

### *To order parts for an activity*

- 1 Tap Activities on the application banner.
- 2 Tap a record in the Activity list.
- 3 Tap Recommended Parts & Tools in the work area.
- 4 Tap Check Trunk.

The Siebel Mobile application checks the inventory in your vehicle trunk and returns the number of available parts.

- 5 Tap Order Part.

If an order does not already exist for the part, then the Siebel Mobile application generates an order. Note that you can generate an order for a line item from the Recommended Parts & Tools view.

- 6 To review the order details, tap the Order number (#) hyperlink field.
- 7 Tap the Order Line number (#) field.

The order line details appear.

## Preparing for a Visit

Before starting an activity, perform the following tasks:

- "Travelling to a Customer Site" on page 133
- "Recording the Arrival at the Customer Site" on page 133
- "Reviewing the Steps and Instructions for an Activity" on page 134
- "Reviewing the Recommended Parts and Tools" on page 134

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Field Service.

## Travelling to a Customer Site

Before you begin travelling to a customer site, you must complete the following task.

### *To travel to a customer site*

- 1 Tap Activities on the application banner.
- 2 Tap a record in the Activity list.
- 3 In the Applet Menu (\*), choose En Route.  
If En Route is disabled, first choose Accept from the menu, then choose En Route.
- 4 To display route on a map from your current location to the customer site, tap the map icon located above the list area.

## Recording the Arrival at the Customer Site

For accurate records, record the arrival at the customer site.

### *To record the arrival at a customer site*

- 1 Tap Activities on the application banner.
- 2 Tap a record in the Activity list.
- 3 In the Applet Menu (\*), choose Arrive.

## Reviewing the Steps and Instructions for an Activity

Before starting an activity, review the steps and instructions required to complete it.

### *To review steps and instructions*

- 1 Select the record in the Activities list.
- 2 Tap Steps in the work area.
- 3 Review the steps in the list.
- 4 Tap Instructions.
- 5 Review the instructions in the list.

## Reviewing the Recommended Parts and Tools

To make sure you have all items that you require to complete the tasks, review the recommended parts and tools.

### *To review the recommended parts and tools*

- 1 Select the record in the Activities list.
- 2 Tap Recommended Parts & Tools in the work area.
- 3 Review the recommended parts and tools for the job.

## Performing a Job

While performing an activity, complete the following tasks:

- ["Confirming That the Steps Are Completed" on page 135](#)
- ["Taking Readings" on page 135](#)
- ["Installing and Replacing Parts" on page 135](#)
- ["Working with Nonserialized Parts" on page 135](#)
- ["Working with Serialized Parts" on page 136](#)
- ["Removing a Serialized Asset" on page 136](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Field Service.

## Confirming That the Steps Are Completed

As you complete each step in the activity, mark the step as done.

### *To confirm that the steps are completed*

- 1 Select the record in the Activities list.
- 2 Tap Steps in the work area.
- 3 Select the first step in the list, then tap the Edit icon.
- 4 Check the Done flag to indicate completion.
- 5 Enter any comments in the Comments field.
- 6 Repeat [Step 1](#) to [Step 5](#) for any remaining steps that you want to confirm are completed.

## Taking Readings

For tasks such as taking a utility meter reading or measuring hydraulic pressure, record a reading.

### *To take a reading*

- 1 Select the record in the Activities list.
- 2 Tap Assets on the application banner.
- 3 Tap Measurements in the work area.
- 4 Tap a Measurement hyperlink record, and then New to add a reading.

## Installing and Replacing Parts

During a visit to a customer site, you might have to install and replace parts. There are two types of parts that can be replaced: parts with and without serial numbers. For more information, see [“Working with Nonserialized Parts” on page 135](#) and [“Working with Serialized Parts” on page 136](#).

## Working with Nonserialized Parts

The following procedure describes how to install a nonserialized part.

### *To install a nonserialized part or product*

- 1 Select the record in the Activities list.
- 2 Tap Part Tracker in the work area.
- 3 In the Move Parts list, tap the New (+) icon.

- 4 In the Move Part form, tap the Product field.  
The Pick Product list appears.
- 5 In the Pick Product list, select a product, and tap OK.
- 6 Tap the Asset number (#) field.  
The Pick Asset list appears.
- 7 Choose an asset number, then tap OK.
- 8 Select Billable, then tap OK to return to the Move Parts list.

## Working with Serialized Parts

To install and replace a serialized part, perform the following steps:

- ["Removing a Serialized Asset" on page 136](#)
- ["Generating an RMA" on page 137](#)
- ["Installing a Serialized Replacement Asset" on page 137](#)

## Removing a Serialized Asset

Before you can install a new serialized asset, you must remove the current one.

### *To remove a serialized asset*

- 1 Select a record in the Activities list.
- 2 Tap Part Tracker in the work area.
- 3 In the Move Parts list, tap the New (+) icon.
- 4 In the Move Part form, tap the fields, and do the following:

Tap this field	Then do this
Product	Select a product from the drop-down list.
Status	Select Defective from the drop-down list.
Asset	Select an asset from the drop-down list.
From	Select Customer from the drop-down list.
To	Select Trunk from the drop-down list.
Comments	Add any comments.

- 5 Tap OK to return to the Move Parts list.
- 6 Tap Commit.



## Generating an RMA

After removing a serialized part, you generate a Return Merchandise Authorization (RMA) for the part. The procedure for generating an RMA assumes that you have completed the procedure for removing a serialized part.

### *To generate an RMA*

- 1 In the Move Parts list, tap RMA.
- 2 Tap the Order number (#) field.
- 3 In the Order Details list, tap the Line field for the first record.
- 4 Review the order line item details in the Order Line Details form.
- 5 Tap Back to return to the Move Parts list.

## Installing a Serialized Replacement Asset

After generating an RMA, you are ready to install a serialized replacement asset. The procedure for installing a replacement asset assumes you have generated an RMA for the defective part.

### *To install a serialized replacement part*

- 1 From the Move Parts list, tap the New (+) icon.
- 2 Tap Move in the Move Parts list.
- 3 In the Move Part form, tap the fields, and do the following:

Tap this field	Then do this
Asset	Select an asset from the drop-down list.
Status	Select Good from the drop-down list.
Comments	Add any comments.

- 4 Check Billable, then tap OK to return to the Move Parts list.
- 5 In the Move Parts list, tap Commit.

## Closing the Visit

At the end of the visit, complete the following tasks to close the visit:

- “Making Sure That All Remaining Steps Are Completed” on page 138
- “Recording the Time of Completion for the Activity” on page 138
- “Recording Expenses” on page 139
- “Generating an Invoice for the Activity” on page 139
- “Closing the Activity” on page 140

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Field Service.

## Making Sure That All Remaining Steps Are Completed

Make sure that all sure that all remaining steps are completed before leaving the customer location.

### *To make sure that all remaining steps are completed*

- 1 Select the record in the Activities list.
- 2 Tap Steps in the work area.
- 3 Make sure that all steps have their Done field checked.

## Recording the Time of Completion for the Activity

For accurate records, you must record the end time for the activity.

### *To record the time of completion*

- 1 Tap Activities on the application banner.
- 2 Tap a record in the Activities list.
- 3 Tap Time Tracker in the work area.
- 4 Tap End to enter the end time.

After the end time is entered, the time is calculated and entered in the Hrs field. The Billable field is selected by default. You can also delete the time in the Start and End fields and manually enter the time in these fields.

## Recording Expenses

If you incurred any expenses as part of this customer visit, then you must enter them so that they can be included in the invoice.

### *To record expenses*

- 1 Select the record in the Activities list.
- 2 Tap Expense Tracker in the work area.
- 3 In the work area, tap the New (+) icon.
- 4 Tap the Type field, then choose an item from the Type drop-down list.
- 5 Tap the Amount field, enter a value, and then tap OK.
- 6 Select the Billable check box.
- 7 Tap the Comments field, and enter any comments.

## Generating an Invoice for the Activity

Before leaving the customer site, generate an invoice.

### *To generate an invoice*

- 1 Select the record in the Activities list.
- 2 Tap Invoices in the work area.
- 3 In the work area, tap Auto Invoice.  
A record is inserted in the list.
- 4 To display the invoice line items, tap Invoice number (#).
- 5 If required, tap an invoice line item to display the Invoice Line Item details for that record.
- 6 In the Activities Invoices Work area, Tap Sign.  
The Invoice Signature View appears.
- 7 Select a contact.
- 8 Capture the signature, and tap Save.

## Closing the Activity

Close the activity using this procedure.

### *To close the activity*

- 1 Tap Activities on the application banner.
- 2 Tap a record in the Activities list.
- 3 Tap Menu (\*) in the work area, and then tap Finish.

## Performing Miscellaneous Tasks

Perform the following tasks as required:

- [“Reviewing Customer History” on page 140](#)
- [“Logging a New Service Request” on page 141](#)
- [“Generating a Sales Order” on page 141](#)
- [“Adding an Activity” on page 142](#)
- [“Verifying Inventory Update” on page 143](#)
- [“Updating a Shift, Break, and Period of Unavailability” on page 143](#)

**NOTE:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Field Service.

## Reviewing Customer History

You might want to review the history of service requests for a customer so that you are aware of the service history for the customer.

### *To review customer history*

- 1 Tap Accounts on the application banner.
- 2 Find and select the customer account record that you want to review.
- 3 Tap Service Requests in the work area.

The Service Requests view appears showing all the service requests for the account.

## Logging a New Service Request

While on a customer visit, you might discover another problem requiring attention, and you must log a new service request for the customer.

### *To log a new service request*

- 1 Tap Accounts on the application banner.
- 2 Select a record in the Accounts list.
- 3 Tap Assets.
- 4 Tap the Asset number (#) field.
- 5 In the Asset Details list, verify the applicable warranties.
- 6 Tap Back to return to the Assets list.
- 7 To confirm the service level entitlement, tap Entitlements.
- 8 Verify the entitlements in the Entitlements list.
- 9 To log a new service request, tap Service Requests, and then tap the New (+) icon.
- 10 Complete the fields in the New SR form.
- 11 Tap OK.

## Generating a Sales Order

This procedure describes how to generate and print a sales order for a service request.

### *To generate a sales order*

- 1 Tap Service Reqs on the application banner.
- 2 Select a record in the Service Reqs list.
- 3 Tap Orders in the work area.
- 4 Tap the New (+) icon.
- 5 From the Type menu, choose Sales Order.
- 6 In the Requested Ship Date field, enter a date, and then save the record.
- 7 Tap the Order number (#) hyperlink field.  
The Order Entry Line Items form appears.
- 8 Tap the New (+) icon to add a new line item.
- 9 Tap the Product field, and select a product from the Pick Product list.
- 10 Complete the remaining fields on the Order Entry Line Items form, then tap Save.
- 11 In the Order Details list, tap OK.

## Adding an Activity

You can add an activity to an existing service request or add a miscellaneous activity, such as making a bank deposit or taking a truck in for servicing, which is not associated with a particular account.

### *To add an activity to a service request*

- 1 Tap Service Reqs on the application banner.
- 2 Select a record in the Service Reqs list.
- 3 Tap Activities in the work area.
- 4 Tap the New (+) icon.  
The *New Activity* form appears.
- 5 In the Type menu, choose an activity.
- 6 Complete the remaining fields, and then tap Save.

### Adding a Miscellaneous Activity

The following procedure shows you how to add a miscellaneous activity.

### *To add a miscellaneous activity*

- 1 Tap Activities on the application banner.
- 2 Tap the New (+) icon.  
The *New Activity* form appears.
- 3 In the Type menu, choose an activity.  
For example, Appointment, Administration, Call-Inbound, In Store Visit, Meeting, and so on.
- 4 Select a service request number from the SR number (#) drop-down list.
- 5 Select an account from the Account drop-down list.
- 6 Enter any text in the Comments field.
- 7 Tap Save.

## Verifying Inventory Update

You must periodically verify that the inventory in the van matches the recorded inventory.

### *To verify inventory updates*

- 1 Tap Browser on the application banner.
- 2 Query for the individual product that you want to verify.
- 3 Tap the Product field of the product that you are verifying.
- 4 Compare the balances in the Availability field with your printed inventory report.

## Updating a Shift, Break, and Period of Unavailability

You can update a shift, break, and period of unavailability (POU) in your Siebel Mobile application for Siebel Field Service if you are using Siebel Real-time Scheduler Version 2.1 or later as your scheduling engine and Siebel Field Service Integration to Oracle Real-time Scheduler Version 2.1 or later integration pack for integration. You can view, start, and end a shift, break, and POU, using the Shifts tab on the application banner.

### Starting or Ending a Shift

Use the following procedure to start or end a shift.

#### *To start or end a shift*

- 1 Tap Shifts on the application banner.
- 2 Select a record in the Shifts list.
- 3 Tap Start to start a new shift, or tap Complete to end the shift.

### Starting or Ending a Break

Use the following procedure to start or end a break.

#### *To start or end a break*

- 1 Tap Shifts on the application banner.
- 2 Select a record in the Shifts list.
- 3 Tap Breaks.
- 4 Select a Break record in the list.
- 5 Tap Start to start a new break, or tap Complete to end the break as required.

## Starting or Ending a Period of Unavailability

Use the following procedure to start or end a period of unavailability (POU).

### *To start or end a period of unavailability*

- 1 Tap Shifts on the application banner.
- 2 Select a record in the Shifts list.
- 3 Tap POU.
- 4 Select a POU record in the list.
- 5 Tap the Edit icon.
- 6 Change the status as required.
- 7 Tap Save.



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