



# Getting Started with Siebel Offline Client for Life Sciences

Version 8.0

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# Contents

## Chapter 1: What's New in This Release

## Chapter 2: Installing, Setting Up, and Synchronizing the Offline Client for Life Sciences

Overview of the Offline Client for Life Sciences	9
Installing the Component Applications for the Offline Client for Life Sciences	10
Installing the Sync Application	10
Installing the Sales Application	11
Installing the Asset Message Planner Application	11
Uninstalling the Sales, Sync, and AMP Applications	12
Authenticating Users and Synchronizing Data for the First Time	12
Signing On and Synchronizing Data for the First Time	13
About Network Connectivity Sensing and Automated Synchronization	13
Manually Synchronizing Data	14
Incremental Synchronization	14
Verifying Network Connectivity	16
Starting the Sales or AMP Application	16
Setting Up Siebel CRM Users for the Offline Client for Life Sciences	16

## Chapter 3: Navigating the User Interface

Sales Application Home Page	19
Contact and Account Quick Lists and Alphabet Bar	19
Call Plan Area	20
Calendar Section	21
Setting User Preferences	23
User Assistance	23

## Chapter 4: Planning Customer Calls

Checking the Planned Calls for Today	25
Displaying a Call Summary	25
Planning Contact Calls	26
Using the Quick List to Select a Contact	26
Creating a Search Query to Find Contacts	26
Creating a Contact Call from the Home Page	27
Preparing for a Contact Call	27

- Planning an Account Call 34
  - Using the Quick List to Select an Account 34
  - Creating a Search Query to Find Accounts 35
  - Creating an Account Call from the Home Page 35
  - Preparing for an Account Call 36
  - Preparing an Attendee Call 39

## **Chapter 5: Conducting Customer Calls**

- Conducting Calls for Contacts 41
  - Displaying the Professional Call Page 42
  - Entering or Updating Professional Call Details 42
  - Working with Samples Dropped to a Contact 43
  - Working with Promotional Items Dropped to a Contact 44
  - Working with Product Details 45
  - Reviewing Presentation Items Shown to a Contact 46
- Recording Contact Signatures 46
- Conducting Calls for Accounts 48
  - Displaying the Account Call Page 48
  - Entering or Updating Account Call Details 49
  - Working with Related Contact Information 50
  - Working with Product Details 51

## **Chapter 6: Delivering a Personalized Content Delivery Presentation**

- About PCD Presentations 53
- Detailer Start Page 53
- Viewing Message Plans 54
- Starting a Message Plan Presentation 54
- About Message Plan Presentations 55
- About Marking Up a Presentation 56
- Detail Summary Page 57

## **Chapter 7: Working with the Asset Message Planner**

- Navigating the User Interface 59
- Working with Assets 60
  - Adding Assets to the Asset Management Palette 60
  - Selecting the Asset Types to Display 60
  - Changing Your View of the Assets 61

Adding or Changing Asset Details	61
Working with Asset Components	62
Controlling Access to Assets	63
Working with Message Plans	63
Reviewing Message Plans	63
Changing Your View of Message Plan Items	64
Adding or Changing Message Plan Details	64
Selecting a Message Plan Item for Disclosure	65
Controlling Access to Message Plans	66
Viewing Solutions for Message Plans	66

## Index



# 1

## What's New in This Release

### What's New in Getting Started with Siebel Offline Client for Life Sciences, Version 8.0

This new guide describes how to install and use Oracle's Offline Client for Life Sciences application.

**NOTE:** The Offline Client for Life Sciences Release 1.5 supports Siebel CRM Version 8.0.

The Offline Client for Life Sciences, which includes mobile Customer Relationship Management (CRM) capabilities, supports sales representatives in the field by allowing them to plan and execute sales calls, drop product samples, obtain associated signatures, and deliver electronic presentations.

This guide describes the preconfigured features of the Offline Client for Life Sciences. To customize or change the preconfigured features, such as fields, UI layout, add strings, and generally extend the application, see *Configuration Guide for Siebel Offline Client for Life Sciences*.

Table 1 lists the chapters in this version of the documentation to support Version 8.0 of the software.

Table 1. New Product Features in Getting Started with Siebel Offline Client for Life Sciences, Version 8.0

Topic	Description
<a href="#">Chapter 2, "Installing, Setting Up, and Synchronizing the Offline Client for Life Sciences"</a>	This chapter describes how to install and set up the Offline Client for Life Sciences and synchronize data with Siebel CRM.
<a href="#">Chapter 3, "Navigating the User Interface"</a>	This chapter introduces the Offline Client for Life Sciences Sales component user interface.
<a href="#">Chapter 4, "Planning Customer Calls"</a>	This chapter describes how to prepare for a customer call, using the functions in the Contact Detail and Account Detail pages.
<a href="#">Chapter 5, "Conducting Customer Calls"</a>	This chapter describes how to conduct a customer call using the functions in the Contact Call and Account Call pages. It also describes how to obtain customer sign-off on product samples.
<a href="#">Chapter 6, "Delivering a Personalized Content Delivery Presentation"</a>	This chapter describes how to deliver presentations to customers using the Detailer.
<a href="#">Chapter 7, "Working with the Asset Message Planner"</a>	This chapter describes how to use the Asset Message Planner (AMP) component of the Offline Client for Life Sciences.





# 2

## Installing, Setting Up, and Synchronizing the Offline Client for Life Sciences

This chapter describes how to install and set up the Offline Client for Life Sciences and how to synchronize it with Siebel CRM. It includes the following topics:

- [Overview of the Offline Client for Life Sciences on page 9](#)
- [Installing the Component Applications for the Offline Client for Life Sciences on page 10](#)
- [Authenticating Users and Synchronizing Data for the First Time on page 12](#)
- [Starting the Sales or AMP Application on page 16](#)
- [Setting Up Siebel CRM Users for the Offline Client for Life Sciences on page 16](#)

### Overview of the Offline Client for Life Sciences

The Offline Client for Life Sciences is designed to increase the productivity of mobile sales users and to provide the tools a sales representative needs to complete a sales call. The Offline Client for Life Sciences synchronizes data with Siebel CRM through Web services. It also provides offline mobile support for key sales tasks including call planning, call execution with sample drops and signature capture, and delivery of electronic presentations according to Personalized Content Delivery (PCD). It also allows brand marketing and sales operations users to manage assets and message plans.

The Offline Client for Life Sciences includes the following applications:

- **Sync application.** The Sync application manages network connectivity and authentication with Siebel CRM. It also manages the synchronization of data between the local database of the offline client and with Siebel CRM as required. Typically, the Sync application runs in the background; users rarely have to interact with it.
- **Sales application.** The Sales application provides the mobile sales application and user interface designed and optimized for mobile PC pen computing and touch computing. The Sales application operates in disconnected mode with the local database.
- **Asset Message Planner (AMP) application.** The AMP application allows brand marketing and sales operations users to manage assets and message plans.

For information about all required software and recommended system requirements for the Offline Client for Life Sciences, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

# Installing the Component Applications for the Offline Client for Life Sciences

The Offline Client for Life Sciences provides the following AIR files for installation on your computer:

- **sync.air**. The Sync application installation file. This file is required for the installation.
- **sales.air**. The Sales application installation file. This file is required to use the Sales application.
- **amp.air**. The AMP application installation file. This file is required to use the AMP application.

**CAUTION:** You must have Adobe AIR 2.5 installed on your computer before installing the AIR files for the application. You must install the Sync application (sync.air) before you install the Sales application (sales.air) or AMP application (amp.air).

This topic includes the following information:

- [Installing the Sync Application on page 10](#)
- [Installing the Sales Application on page 11](#)
- [Installing the Asset Message Planner Application on page 11](#)
- [Uninstalling the Sales, Sync, and AMP Applications on page 12](#)

## Installing the Sync Application

Complete the steps in the following procedure to install the Sync application. Contact your company's system administrator for information about where to download the Sync application from.

### *To install the Sync application*

- 1 Double-click the downloaded file to begin the installation.  
The Adobe AIR installer starts.
- 2 Click Install on the AIR Application Install screen.
- 3 On the Installation Preferences screen, review the default preferences, make any required changes, and then click Continue. An example default preference is the installation directory.  
The Sync application installation begins.
- 4 If you have not selected the Start Application After Installation check box, click Finish when the screen with the message, Installation Completed, appears.
- 5 To start the Sync application, click the Sync icon on the desktop.  
After several seconds, a Sync icon appears in the system tray of the operating system.

## Installing the Sales Application

Complete the steps in the following procedure to install the Sales application. Contact your company's system administrator for information about where to download the Sales application from.

### *To install the Sales application*

- 1 Double-click the downloaded file to begin the installation.  
The Adobe AIR installer starts.
- 2 Click Install on the AIR Application Install screen.
- 3 On the Installation Preferences screen, review the default preferences, make any required changes, and then click Continue. An example default preference is the installation directory.  
The Sales application installation begins.
- 4 If you have not selected the Start Application After Installation check box, click Finish when the screen with the message, Installation Completed, appears.
- 5 To start the Sales application, click the Sales icon on the desktop.
- 6 Click OK on the Security Check Failed message.

When the Sales application is installed for the first time, the Sync application requests the user's login credentials, which are then authenticated using Siebel CRM as required. A sign-in window appears above the system tray of the operating system. To sign on to Siebel CRM, you complete the procedure [Signing On and Synchronizing Data for the First Time on page 13](#).

## Installing the Asset Message Planner Application

Complete the steps in the following procedure to install the Asset Message Planner (AMP) application.

### *To install the Asset Message Planner (AMP) application*

- 1 Double-click the downloaded file to begin the installation.  
The Adobe AIR installer starts.
- 2 Click Install on the AIR Application Install screen.
- 3 On the Installation Preferences screen, review the default preferences, make any required changes, and then click Continue. An example default preference is the installation directory.  
The AMP application installation begins.
- 4 If you have not selected the Start Application After Installation check box, click Finish when the screen with the message, Installation Completed, appears.

- 5 To start the AMP application, click the AMP icon on the desktop.

When the AMP application is installed for the first time, the Sync application requests the user's login credentials, which are then authenticated using Siebel CRM as required. A sign-in window appears above the system tray of the operating system. To sign on to Siebel CRM, you complete the procedure [Signing On and Synchronizing Data for the First Time on page 13](#).

## Uninstalling the Sales, Sync, and AMP Applications

You can uninstall the Sales, Sync, and AMP applications using the Uninstall or Remove Programs list in the Windows Control Panel. You must remove application folders manually.

### *To uninstall the applications*

- 1 In the Windows Control Panel, navigate to Add or Remove Programs.
- 2 To uninstall the programs, find and select the programs, and then click Remove.  
For Siebel CRM, remove the following programs:
  - Oracle's Siebel CRM Offline Client – Sales Application
  - Oracle's Siebel CRM Offline Client – Sync
  - Oracle's Siebel CRM Offline Client – AMP Application
- 3 Delete the Sales, Sync, and AMP folders.
  - For Windows Vista and Windows 7, the folders are under Users, *user folder*, AppData, Roaming.
  - For Windows XP, the folders are under Documents and Settings, *user folder*, Application Data.

## Authenticating Users and Synchronizing Data for the First Time

This topic describes how to authenticate the user and synchronize data between the Sync application and Siebel CRM for the first time. It includes the following information:

- [Signing On and Synchronizing Data for the First Time on page 13](#)
- [About Network Connectivity Sensing and Automated Synchronization on page 13](#)
- [Manually Synchronizing Data on page 14](#)
- [Incremental Synchronization on page 14](#)
- [Verifying Network Connectivity on page 16](#)

## Signing On and Synchronizing Data for the First Time

When the Sales application is installed for the first time, the Sync application requests the user's login credentials for Siebel CRM, which it authenticates.

### *To sign on and synchronize data for the first time*

- 1 In the Sign In window that appears above the system tray, enter your login credentials.

For example, enter the following for Siebel CRM:

Username: CWHITE

Password: CWHITE

- 2 Click Sign In.

The Sync application authenticates you with Siebel CRM as required.

The Sync application's icon in the system tray indicates that a synchronization is in progress. An initial, full download synchronization then starts from Siebel CRM.

After the initial synchronization is complete, the Sync application icon displays the Idle status.

## About Network Connectivity Sensing and Automated Synchronization

The Sync application automatically detects when there is network connectivity and determines when it can connect to the Siebel CRM server. The Sync icon indicates a disconnected state when it cannot determine the network connectivity status.

The Sync application automatically synchronizes data with Siebel CRM when network connectivity is available. The synchronization references a timed interval. This synchronization interval is set to 60 minutes by default, which means data synchronization occurs automatically every 60 minutes if the Sync application can connect to the server. If the Sync application cannot connect to the server at the synchronization interval, synchronization occurs when network connectivity is reestablished.

**NOTE:** You can reset the synchronization interval in the `datasources.xml` file. The `ListOfDataSources SyncPeriod` attribute is set to 60 by default in `datasources.xml`, for example:

```
ListOfDataSources SyncPeriod="60"
```

## Manually Synchronizing Data

You can manually synchronize data with Siebel CRM from the Sync application console by completing the steps in the following procedure.

### *To manually synchronize data*

- 1 To display the Sync application console, click the Sync application icon in the system tray.
- 2 Choose Siebel CRM to synchronize data with by clicking the data source field in the Data Source Information section, and selecting an entry from the list.

For example, choose DataSource: Sales (OfflineClient1)

**NOTE:** The data source names are configured by the developer or customer administrator. For more information, see *Configuration Guide for Siebel Offline Client for Life Sciences*.

- 3 Click Sync to begin the synchronization.

Synchronization processing is logged on the right side of the Sync application console area. A Sync Complete message appears in the Detail Log area when the synchronization processing is completed.

- 4 You must close and log in to the Sales or AMP application again when synchronization is complete, and then do the following:
  - In the Sign In window, which appears above the system tray, enter your login credentials and then click Sign In.

When you have signed in, the Sync client console displays a message indicating that the data is refreshed.

- 5 Minimize the Sync client console to the operating system tray.
- 6 Return to the Sales or AMP application.

## Incremental Synchronization

The Sync application performs incremental data synchronizations with after the initial, full download. Incremental synchronizations involve small and frequent synchronizations with the server, which capture only the information that has changed since the last synchronization. The synchronization is done automatically as part of the synchronization process after the initial, full download synchronization has been performed.

For Siebel CRM, as long as the required server components are running, there are no problems with incremental synchronization. The required components for the Siebel Remote Component Group are Transaction Processor and Transaction Router. To understand more about Siebel Server management, see *Siebel Remote and Replication Manager Administration Guide*.

## Setting Up Incremental Synchronization for Objects in Siebel CRM

For incremental synchronization on an object to work for a sales representative in Siebel CRM, certain conditions must be met. Complete the steps in the following procedure to set up incremental synchronization for an object in Siebel CRM.

### To set up incremental synchronization on objects in Siebel CRM

- 1 Verify that the sales representative has been added to the mobile client list in Siebel CRM.
  - a Navigate to the Administration - Siebel Remote screen, and then the Mobile Clients view.
  - b Click New and add the sales representative, if necessary.
  - c Make sure that the value in the Remote Node Type field is one of the values shown in the following table.

Field	Value
Remote Node Type	Valid values to set up incremental synchronization are: <ul style="list-style-type: none"><li>■ Offline Client</li><li>■ Both</li></ul>

- 2 Add the object to the mapping table.

**NOTE:** This step is required for custom objects only as they are not preconfigured for the Offline Client for Life Sciences.

- a Navigate to the Administration - Modification Tracking screen, and then the Object Table Mappings view. This view shows all the objects that will participate in the incremental download.

**NOTE:** The Modification Tracking view lists all the transactions which must be synchronized with the Offline Client for Life Sciences.

- b Click New and add the object to the Objects Definition list.

For example, add the LSSGOP\_Account object with the values shown in the following table.

Field	Value
Object	LSSGOP_Account
Table	S_ORG_EXT
Business Component	Account
Inactive	N

- 3 Set the object to 1 (download) in the datasources.xml file. For example:

```
LSSGOP_Account = "i"
```

## Verifying Network Connectivity

You can use the Sync application to verify the network connectivity to Siebel CRM without starting synchronization.

### *To verify network connectivity*

- 1 Open the Sync application by clicking the Sync icon in the system tray.
- 2 Choose Siebel CRM by clicking the data source field in the Data Source Information section, and selecting an entry from the list.
- 3 Click Test Server Authentication.

A successful authentication returns a value for the Session Id field in the Sync application.

## Starting the Sales or AMP Application

You can start the Sales or AMP applications after you see a message indicating you can refresh the applications. The Sync application continues downloading image attachments. When the download is complete, the Sync application displays a Sync Complete message in the Detailed Log, and the icon in the system tray changes to the Idle status.

### *To start the Sales or AMP application*

- Double click the Sales or AMP icon on your computer desktop.

The Sales or AMP application starts. If the Sync application is not running, it starts automatically.

## Setting Up Siebel CRM Users for the Offline Client for Life Sciences

Complete the following procedure to configure Siebel CRM users for the Offline Client for Life Sciences.

### *To configure Siebel CRM users for the Offline Client for Life Sciences*

- 1 Log into your Siebel business application.
- 2 Navigate to the Administration - Server Configuration screen, Enterprises, and then the Synchronize view.
- 3 Click the Synchronize button.
- 4 Navigate to the Administration - Siebel Remote screen.



- 5 Create a new mobile client record, for example, called SPORTER and set the fields for SPORTER as shown in the following table.

**NOTE:** If SPORTER already exists, then delete it and recreate the record setting the App Server Name to the current server and the other fields as shown in the following table.

Field	Value
App Server Name	Set this field to the name of the current server
User ID	SPORTER
Routing Model	MOBILE CLIENT - STANDARD
Language	ENU
Remote Node Type	Offline Client

- 6 Navigate to the Administration - Server Management screen, then the Jobs view.
- 7 Create a new job with the parameter shown in the following table.

Field	Value
Component/Job	Generate New Database

This creates a new database template in the Siebel \dbtempl folder.

Create one job for each server.

- 8 Wait until the task in [Step 7](#) completes successfully.
- 9 Create a new job with the parameters shown in the following table.

Field	Value
Component/Job	Database Extract
Parameters	Client Name - SPORTER

This creates a new folder in the Siebel \docking folder. For example:

Siebel \docking\SPORTER

Create one job for each user.

- 10 Wait until the task in [Step 9](#) completes successfully.
- 11 Repeat [Step 9](#) and [Step 10](#) for each remote client.

Remote user setup is complete.



# 3

## Navigating the User Interface

This chapter describes how to navigate the Sales application's user interface. It includes the following topics:

- [Sales Application Home Page on page 19](#)
- [Setting User Preferences on page 23](#)
- [User Assistance on page 23](#)

### Sales Application Home Page

The Sales application home page is the starting point for using the Offline Client for Life Sciences. The home page has four sections:

- **Application banner and tabs (top).** The banner that appears along the top of the interface persists for all views. It includes the following buttons:
  - **Home.** Returns the user to the home page view.
  - **Call Activity.** Displays the Call page.
  - **Detailer.** Displays Personal Content Delivery (PCD) detailer start page.
- **Quick lists (left side).** Lists customer contacts or accounts.
- **Call Plan area (upper right).** The Call Plan area is used to navigate and manage planned customer calls and to add new customer calls.
- **Context information and work area (lower right).** This area displays a calendar view of the day's customer calls in the home page view by default. However, other pages, such as the Contact Profile page or Call Details page are also displayed in this area when they are invoked.

### Contact and Account Quick Lists and Alphabet Bar

You can view a list of contacts and accounts for your territory using the quick list on the left side of the interface. The quick list displays contact or account information in two lists.

You can do the following from the quick list:

- Alternate between the list of contacts and accounts in your list view by clicking Contacts or Accounts.
- Minimize or expand the quick list, by clicking the left (<<) or right (>>) arrows.

- Sort the data in the contact or account list by selecting a field from the Arrange By list above the quick list:
  - **Name.** Sorts contacts or accounts alphabetically by last name.
  - **Last Visited.** Sorts contacts or accounts by the date of the last visit to the contact or account.
  - **Rank.** Sorts contacts or accounts in numeric order.

This field corresponds to the Market Potential field setting in Siebel CRM, and sorts contacts or accounts as follows: 1 (High), 2 (Medium), and 3 (Low).
- Filter the contact or account list by clicking a letter in the alphabet bar.

This action positions the contact or account list as the first available last name in the list with the selected letter.
- View a contact's or account's summary information by double-clicking a specific contact or account from the quick list. The summary information is provided as a *vCard*, a summary display of the customer profile information similar to a business card. From the vCard that is displayed, you can do the following:
  - Display the Contact Profile or Account Profile page by clicking 360 in the vCard.
  - Display the Call Detail page to schedule a call by clicking Schedule a Call for Today in the vCard.

## Call Plan Area

You can view contact or account information for any scheduled or planned meetings in the Call Plan area that appears in the upper-right side of the home page. In this section, contact or account information is provided in vCard format for any calls. A *scheduled call* is a call where the meeting time has been agreed with the customer. A *planned call* is a call where the day is known but not the time of the meeting. In a scheduled call, the activity field is set to Appointment. In a planned call, it is set to Task. The default display shows call meetings that are scheduled for today.

You can do the following from the Call Plan area:

- Show the vCards with contact or account information for planned calls, by clicking Planned.
- Show the vCards with contact or account information for scheduled calls, by clicking Scheduled.
- Change the calendar date to a previous date, or a date in the future using the right and left arrows at the top of the section, or you can pick a day by clicking the date and using the calendar date selector.
- Arrange the vCards by selecting a field that you want to sort from the Arrange By list.

For scheduled call vCards:

  - **Start.** Sorts the vCards by the start time and date of the meeting.
  - **City.** Sorts the vCards by the city where the meeting is located.
  - **Name.** Sorts the vCards alphabetically by the last name.

For planned call vCards:

- **Account Name.** Sorts the vCards by the name of the account.
- **City.** Sorts the vCards by the city where the meeting is located.
- **Last Name.** Sorts the vCards alphabetically by the last name.
- Scroll through the displayed vCards using the left and right arrows.
- Display the Call page by clicking View Scheduled Call on a vCard for a scheduled call.  
Clicking View Scheduled Call on a planned call converts it to a scheduled call and moves the vCard from the Planned Call view to the Scheduled Call view.
- Display the Contact Profile or Account Profile page for a contact or account by clicking anywhere on the contact or account vCard.
- Minimize the Call Planning Navigator by clicking Minimize in the upper-right corner of the navigator section.

## Calendar Section

You can view a daily calendar of scheduled calls or appointments in the calendar section that appears in the lower-right side of the home page. An appointment is an Activity with Type set to Appointment.

From the calendar, you can do the following:

- See additional times by using the scroll bar to the right of the calendar.
- Change the calendar to an earlier or later date using the right and left arrows at the top of the calendar, or click the date and use the calendar date selector.
- Change to a daily, weekly, or monthly calendar view by clicking Day, Week, or Month.
- Move scheduled calls or appointments to different times and days in the calendar by dragging and dropping the call entries to the time and date that you want. You can change the duration of an appointment by increasing or decreasing the height of the entry in the calendar to change the start and end time.

**NOTE:** Calls that are signed or submitted cannot be moved, and duration is read-only.

- Minimize the calendar by clicking Minimize in the upper-right corner of the calendar section.

## Calendar Week View

In the calendar, you can click Week to see the scheduled calls in a five-day week view, starting on Monday. The time is on the vertical axis.

The date on the horizontal axis displays the date for the first day of the week. The calendar displays time from 8:00 A.M. to 5:00 P.M. in hourly increments, by default.

You can do the following from the calendar week view:

- Change the week displayed to the next or previous week by clicking the right or left arrows next to the date. The calendar moves to the same day of the week for the next or previous week.
- Change the week displayed to a future week by using a date selector that appears when you click the date.
- View completed or scheduled calls on the calendar entries for the week. In the entries, the icons are displayed as follows:
  - A check mark indicates a completed call.
  - A clock indicates scheduled call.
  - A pen indicates a call with a signature.
- Move scheduled calls to different times and days in the calendar by dragging and dropping the calls to the time and date that you want. You cannot move completed calls and calls with signatures.
- Display a Call Detail page by double-clicking the calendar entry.

## Calendar Month View

In the calendar, you can click Month to view the scheduled calls in a monthly view.

You can do the following from the calendar month view:

- Change the month displayed to the next or previous month by clicking the right or left arrows next to the date. The calendar moves to same date for the next or previous month.
- Change the month displayed to a future month by using a date selector that appears when you click the date, and then select the month and day.
- View completed or scheduled calls on the calendar entries for the month:
  - Entries with a check mark icon indicate completed calls.
  - Entries with a clock icon indicate scheduled calls.
- Move scheduled calls to different times and days in the calendar by dragging and dropping the calls to the time and date that you want. You cannot move completed calls and calls with signatures.
- Display a Call Detail page by double-clicking the calendar entry.

# Setting User Preferences

You can use Settings on the application banner to set or change your user preference settings.

## *To set your user preferences*

- 1 Click Settings on the application banner.
- 2 In the General tab, you can update the following fields:
  - **Datasource.** Select a data source from the list of available data sources.
  - **Language.** Select a language from the list of available languages.
  - **Skin.** Select a skin to use for the Sales application from the list of available skins. A *skin* is a collection of images and a definition file, which together describe the interface.
- 3 In the Miscellaneous tab, you can update the following fields:
  - **Show Help.** Select this check box to enable embedded help in the Sales application. For more information on the embedded help, see [User Assistance on page 23](#).
  - **Log Level.** Select the log level (1 to 5), where 1 provides the least detailed log messages, but it provides the best performance. Five (5) provides the most detailed log messages.
  - **Suppress Msgs.** Select this check box to suppress application warning messages for the Sales application.
- 4 Click Apply to save your changes.

## User Assistance

The Offline Client for Life Sciences provides user assistance and tool tips to help you use the product. The tips are provided as answers to the question *Do you know?*

You can display the user assistance by clicking the question mark (?) from the following locations in the interface:

- Bottom of the quick list for the Contact quick list only
- Calendar banner

You can stop displaying a tool tip by selecting the Do Not Show at Startup check box at the end of any tool tip.





# 4

## Planning Customer Calls

This chapter describes how to plan customer calls. It includes the following topics:

- [Checking the Planned Calls for Today on page 25](#)
- [Planning Contact Calls on page 26](#)
- [Planning an Account Call on page 34](#)

### Checking the Planned Calls for Today

You can check the scheduled and planned calls for today from the home page default view.

#### *To check the planned calls for today*

- 1 From the home page, click Planned.

The set of vCards for planned calls is displayed showing contact or account information.

You can click Scheduled to return to the default display showing the vCards for scheduled calls.

- 2 Arrange the vCards by clicking a field to sort from the Arrange By list, and scroll through the displayed vCards using the left or right arrows.
- 3 To make a call, click Schedule a Call for Today, and enter the details of the call in the Call Details page.

For more information, see [Entering or Updating Professional Call Details on page 42](#).

- 4 To navigate to the Contact 360 page for the contact and update information in the contact profile, addresses, license information, and so on, click anywhere on the Call Plan area.

For more information on this page, see [Displaying the Contact 360 Page on page 28](#).

### Displaying a Call Summary

You can obtain summary information for a call from the call summary window.

#### *To display a call summary*

- From any calendar view, click the Calendar entry to display a summary window with additional information about the call.

## Planning Contact Calls

This topic describes how to plan for a contact call. It includes the following information:

- [Using the Quick List to Select a Contact on page 26](#)
- [Creating a Search Query to Find Contacts on page 26](#)
- [Creating a Contact Call from the Home Page on page 27](#)
- [Preparing for a Contact Call on page 27](#)

### Using the Quick List to Select a Contact

You can use the quick list on the left side of the Sales application UI to select a contact.

#### *To use the quick list to select a contact*

- 1 Click Contacts at the top of the quick list to select the Contacts quick list.  
**NOTE:** The Contacts quick list is available by default.
- 2 Select a contact by doing one of the following:
  - Click a contact from the quick list on the left side.
  - Run a saved query from the list of saved queries to automatically filter the quick list, for example, by account name, and select a contact from the resulting list.
  - Click a letter from the alphabet bar on the right of the quick list, then locate and click the contact from the resulting list.

### Creating a Search Query to Find Contacts

You can create a search query to help you find contacts.

#### *To create a search query*

- 1 Click Search or the magnifying glass to open the Search dialog box where you define the query.  
The Search dialog box appears above the Contacts quick list with the height of the quick list reduced. The alphabet bar for the contacts appears across the expanded Search dialog box and the Contacts quick list.
- 2 Select the required search field from the Add New Criteria list to add the field to the query. For example, select Account Name or City.
- 3 To remove a search field for the query, click Delete (X) next to the search field.
- 4 Save the search to the predefined search list by clicking Save Search.  
You can clear all values entered for the search criteria fields by clicking Clear.

- 5 To run the query on the contact list, click Apply.
- 6 Close the Search dialog box by clicking the magnifying glass again.

**NOTE:** Search query results are not synced to the Siebel CRM instance.

## Creating a Contact Call from the Home Page

You can create a scheduled call or a planned call from the home page.

### *To create a contact call from the home page*

- 1 From the home page, double-click a contact from the Contact quick list to display the contact's Profile window.

You can close this window by clicking Minimize in the right corner of the window.

- 2 You can create one of the following call types:

- **Scheduled call.** Drag the contact profile window or the list record to a time slot in the Daily or Weekly Calendar.
- **Planned call.** Drag the contact profile window or the list record to the Call Plan area with the planned call vCards displayed.

If the scheduled call vCards are displayed at the same time that a contact is dropped to the Call Plan area, the UI displays the planned call vCard.

You can also create a planned call for a contact by dragging the contact profile window to a day in the monthly calendar. For multiple contacts, you can select contact records in the quick list, and drag and drop the records to the Call Plan area.

- 3 Click Schedule a Call for Today in the contact profile window to create a call with the contact, and to open the Call Details page.

For information on completing the call details, see [Entering or Updating Professional Call Details on page 42](#). When the call is scheduled, you can remove this record from the Daily Calendar view.

## Preparing for a Contact Call

The following procedures support contact call planning and preparation:

- [Displaying the Contact 360 Page on page 28](#)
- [Updating Information in the Contact Profile on page 29](#)
- [Reviewing or Adding Related Account Information on page 29](#)
- [Accessing Address Information for the Contact on page 30](#)
- [Adding or Updating License Information for the Contact on page 30](#)
- [Adding or Updating the Best Call Times for the Contact on page 31](#)

- [Displaying the Network Diagram to View Contact Relationships on page 31](#)
- [Displaying Profile Summary Information for Other Contacts or Accounts on page 32](#)
- [Working with Second-Level Contact Network Relationships on page 33](#)
- [Working with Third-Level Contact Network Relationships on page 33](#)
- [Reviewing the Call History Data on page 34](#)

## Displaying the Contact 360 Page

You can access details on the contact by viewing the Contact 360 page.

### *To display the Contact 360 page*

- 1 To navigate to the Contact 360 page, you can click one of the following:
  - The 360 button from the Contact Profile window on the Contact quick list
  - A contact vCard in the Call Plan area
  - The Call Activity tab at the top of the Sales screen

The Contact 360 page displays the information for the selected contact in the work area with a contact banner at the top. The list of account or contact vCards in the Call Plan area is reduced to a height of one row.

If you click the Call Activity tab, the 360 page displays the information for the first scheduled contact call in the Call Plan area.

- 2 From the Contact 360 page, you can select one of the following tabs:
  - **Contact Profile.** Displays various details about the contact, such as the contact's name, contact type, and so on. The Contact Profile page appears by default.
  - **Accounts.** Displays the related account information for the contact.
  - **Addresses.** Displays the address information for the contact.
  - **Licenses.** Displays the state license information for the contact, typically, a physician or another health care provider.
  - **Best Call Times.** Displays the best time to call on a contact. This information enables you to track when a contact is available at a given location.
  - **Network.** The Network page provides a graphical view of how the contact, the associated accounts, and the secondary contacts are related.
  - **Call History.** The Call History page displays two tables:
    - **Samples Dropped.** Contains information on the number of samples dropped in the last month, the current month, and the month before the last month.
    - **Products Detailed.** Contains information on product details that were reviewed in the last month, the current month, and the month before the last month.

## Updating Information in the Contact Profile

To update contact profile information, complete the following procedure.

### *To update information in the contact profile*

- 1 From the Contact 360 page for the contact, click the Contact Profile tab.
- 2 Update any of the editable fields by clicking the field and entering your information.  
**NOTE:** When you click an editable field, picklists, text boxes, and date selectors appear automatically depending on the field type.

## Reviewing or Adding Related Account Information

You can review and add related account information for the contact.

### *To review or add related account information*

- 1 From the Contact 360 page for the contact, click the Accounts tab.  
The Accounts table for the contact displays the following fields:
  - Account Name
  - Account Type
  - Role
  - Location
- 2 Sort the Account list by clicking the column headings in the table and review the information about the associated account.
- 3 To add a new account for the contact:
  - a Click Add.  
This switches the quick list view on the left to the Accounts quick list.
  - b Drag the required account to the Accounts table for the contact.
- 4 (Optional) To remove or disassociate an existing account record for the contact, click Delete (X) beside the account record in the Accounts table.  
This disassociation is also carried out in Siebel CRM when the next synchronization occurs. However, the account record remains in the local database and in the Siebel CRM database.

## Accessing Address Information for the Contact

If using Siebel CRM, complete the following procedure to view contact address information. You cannot add or update address information for a Contact.

### *To view address information for the contact in Siebel CRM*

- 1 From the Contact 360 page for the contact, click the Addresses tab.
- 2 Sort the address information by clicking the column headings in the table, and review the current address information. The following table shows the address fields.

Address Fields	Description
Street Address	The contact's street address
City	The contact's city
State	The contact's state
Postal Code	The contact's postal code

## Adding or Updating License Information for the Contact

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

### *To add or update license information for the contact*

- 1 From the Contact 360 page for the contact, click the Licenses tab.
- 2 Sort the license list by clicking the column headings in the table.
- 3 Review the current license information.
- 4 To add a new license record for the contact, click Add, and enter the information for the license fields.

To update existing license fields, click the field, and enter the information for that field, as listed in the following table.

Address Fields	Description
License Number	The license number for the contact, for example, PS4231732. (Required.)
State	The U.S. state or jurisdiction associated with the license number. Use the picklist to select the state, for example, NJ for New Jersey. If your jurisdiction is not in the United States, this field is not required.
Status	The status of the license (Active or Inactive). Choose the status.
Expiry Date	The date when the license expires (MM/DD/YYYY). Click the date to display the calendar, and select the expiration date.

- 5 (Optional) To remove or disassociate an existing license record for the contact, click Delete (X) beside the license record.

This disassociation is also carried out in Siebel CRM when the next synchronization occurs. However, the license record remains in the local database and in the Siebel CRM database.

## Adding or Updating the Best Call Times for the 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.

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

- 1 From the Contact 360 page for the contact, click the Best Call Times tab.  
A one-week calendar view of the best call times appears, with days along the vertical axis and hourly time slots along the horizontal axis. By default, the best call times for the primary address of the contact between 8:00 A.M. and 5:00 P.M. are displayed. You can use the scroll bars to view the time slots that are before 8 A.M. and after 5 P.M.
- 2 In the Select Address list, you can select the contact's secondary address to show the best call times for the secondary address.
- 3 Drag the Drag Me to Add New Time icon to the calendar on the required day and time.
- 4 Change the starting time for the best call time by clicking the left side of the icon and dragging it to the required start time.
- 5 Change the duration of the best call time by clicking the right side of the icon and dragging it to shorten or lengthen the best call time.
- 6 To view additional details for an entry for best call times, click the time value in the entry.

## Displaying the Network Diagram to View Contact Relationships

The network diagram provides a graphical view of the relationship between the contact, the associated accounts, and the secondary contacts. The network diagram has three levels, with the selected contact as the node in the center. Second-level relationships appear as nodes linked to the contact. Both contact relationships and account-to-contact relationships are displayed.

You can change between a graphical view and a tabular view of this information by clicking Network or Table in the upper right corner of the Network page.

### *To display the network diagram to view contact relationships*

- 1 From the Contact 360 page, click the Network tab.  
The network diagram appears.
- 2 Review the information that is presented in the diagram.

It displays the following information:

- Summary nodes linked to the second-level nodes showing the number of associated contacts and accounts at that level
  - The contact's full name and job title in the contact nodes
  - The account name and account location in the account nodes
  - A navigation bar at the top of the diagram with the current contact name displayed that indicates where you are in the network
- 3 To view additional details from the network diagram, do one of the following:
    - Double-click the second-level account and contact nodes to display summary information.
    - Click Table View to switch to the Relationships Detail view, which presents the relationship information in a table.
  - 4 You can add an account relationship to the contact by dragging an account from the quick list to the contact node in the network diagram.

The network diagram changes to a tabular view.

## Displaying Profile Summary Information for Other Contacts or Accounts

From the network diagram, you can open the profile summary information for another contact or account in the diagram.

### *To display profile summary information for other contacts or accounts*

- 1 In the network diagram for a contact, click the left side of a second-level node to display a window of the contact or account profile information.

You can click Minimize to close the window.
- 2 In the window, do one of the following:
  - Click 360 to open the 360 view page for the contact or account and close the window.
  - Click Schedule a Call for Today to open the Contact Call page for the contact, and close the window.

If a planned or scheduled call does not exist for the contact, a new call is created.
- 3 To expand the second-level node and display related contacts and accounts, double-click the second-level node.



## Working with Second-Level Contact Network Relationships

You can work with second-level relationship information in a contact node in the network diagram; that is, the information on contacts and accounts that are directly related to the current contact.

### *To work with second-level contact network relationships*

- 1 On the Network Diagram page for a contact, click a second-level contact node.

The contact appears in the center of the network diagram with the contact relationships and account-to-contact relations for this contact as second-level nodes. This contact is added to the navigation bar, with the contact name highlighted to indicate the current position. The contact banner at the top still shows the original contact. The call banner along the bottom shows the call information for the original contact.

- 2 Review the following in the network diagram:
  - The second-level relationships of this contact, shown as nodes that are linked to the contact in the center.
  - The contact relationships and account-to-contact relationships.
  - The summary nodes that are linked to the second-level nodes that show the number of associated contacts and accounts at that level.

## Working with Third-Level Contact Network Relationships

This topic describes how to work with relationship information in a third-level contact node in the network diagram; that is, information on contacts and accounts that are indirectly related to the current account through the direct relationships at the second-level.

### *To work with third-level contact network relationships*

- 1 On the Network Diagram page for a contact, click a third-level contact node.

If the second-level node is an account, the third-level node shows the employees or contacts and the related accounts for that account.

If the second-level node is a contact, the third-level node shows the related contacts and the associated accounts for that contact.

- 2 Review the information that is presented in the network diagram.

## Reviewing the Call History Data

The Call History page provides read-only information on product samples dropped and products detailed. The Call History page displays two tables:

- **Samples Dropped.** Contains information on the number of samples dropped in the last month, the current month, and the month before last month.
- **Products Detailed.** Contains information on products detailed in the last month, the current month, and the month before last month.

### *To review the call history data*

- 1 From the Contact 360 page, click the Call History tab.
- 2 Sort the samples dropped or products detailed information by clicking the column headings in the Samples Dropped and Products Detailed tables.
- 3 Review the information in the Samples Dropped and Products Detailed tables.

# Planning an Account Call

This topic describes how to plan an account call. It includes the following information:

- [Using the Quick List to Select an Account on page 34](#)
- [Creating a Search Query to Find Accounts on page 35](#)
- [Creating an Account Call from the Home Page on page 35](#)
- [Preparing for an Account Call on page 36](#)
- [Preparing an Attendee Call on page 39](#)

## Using the Quick List to Select an Account

You can use the quick list on the left side of the screen to select an account.

### *To use the quick list to select an account*

- 1 Click Accounts at the top of the quick list to select the Accounts quick list.  
**NOTE:** The Contacts quick list is available by default.
- 2 Select an account by doing one of the following:
  - Click an account from the quick list on the left side of the screen.
  - Run a saved query from the list of saved queries to automatically filter the quick list, for example, by account name, and select an account from the resulting list.
  - Click a letter on the alphabet bar on the right of the quick list, then click the account from the resulting list.

## Creating a Search Query to Find Accounts

You can create a search query to find accounts.

### *To create a search query to find accounts*

- 1 Click Search or the magnifying glass to open the Search dialog box to define a query.  
The Search dialog box appears above the Accounts quick list but the height of the quick list is reduced. The alphabet bar for the accounts remains visible across the height of the expanded Search dialog box and the Accounts quick list.
- 2 Select any required search fields from the Add New Criteria list to add the field to the query. For example, select Name or Address.
- 3 To remove a search field for the query, click Delete (X) next to the search field.
- 4 Save the search to the predefined search list by clicking Save Search.  
You can remove all values entered for the search criteria fields by clicking Clear.
- 5 To run a query on the account list, click Apply.
- 6 Close the Search dialog box by clicking the magnifying glass again.

## Creating an Account Call from the Home Page

You can create a scheduled call or a planned call from the home page.

### *To create an account call from the home page*

- 1 From the home page, double-click an account from the Account quick list to show the account's Profile window.  
You can close this window by clicking Minimize in the right corner of the window.
- 2 To create a scheduled call for the account, drag the account profile window or the list record to a time slot in the Daily or Weekly Calendar.
- 3 To create a planned call for the account, drag the Contact Profile window or the list record to the Call Plan area that contains the planned call vCards.  
For a planned call, if the scheduled call vCards are displayed at the time an account is dropped in to the Call Plan area, the UI display changes to the planned call vCard display. You can also create a planned call for an account by clicking and dragging the Account Profile window to a day in the monthly calendar. For multiple accounts, you can select account records in the quick list, then drag and drop the records to the Call Plan area.
- 4 You can click Schedule a Call for today (if using Siebel CRM) in the account profile window to create a call for the account in the Call Detail page.  
You can remove the scheduled call in the Daily Calendar view.

## Preparing for an Account Call

The following procedures support account call planning and preparation:

- [Displaying the Account 360 Page on page 36](#)
- [Updating Information in the Account Profile on page 36](#)
- [Adding Related Contact Information on page 37](#)
- [Displaying the Network Diagram to View Account Relationships on page 37](#)
- [Reviewing the Call History Data on page 38](#)

### Displaying the Account 360 Page

You can access details on the account by viewing the Account 360 page.

#### *To display the Account 360 page*

- 1 Navigate to the Account 360 page, using one of the following methods:
  - Click 360 from the Account Profile window on the Account quick list.
  - Double-click an account vCard in the vCards area.

The Account 360 page displays the information for the selected account in the work area with an account banner at the top. The list of account or contact vCards in the Call Plan area is limited to a height of one row.

- 2 From the Account 360 page, click one of the following tabs to view the following information:
  - **Account Profile.** Displays various details about the account, such as the account name, type, status, and so on.
  - **Contacts.** Displays the related contact information for the account.
  - **Network.** The Network page provides a graphical view of how the accounts, the associated contacts, and the secondary accounts are related.
  - **Call History.** The Call History page displays the Products Detailed table, which contains information on products detailed in the last month, the current month, and the month before last month.

### Updating Information in the Account Profile

To update account profile information, complete the following procedure.

#### *To update information in the account profile*

- 1 From the Account 360 page for the account, click the Account Profile tab.
- 2 Update any of the editable fields by clicking that field and entering your information.

**NOTE:** When you click an editable field, picklists, text boxes, and date selectors appear automatically depending on the field type.

## Adding Related Contact Information

You can review and add related contact information for the account.

### *To work with related contact information*

- 1 From the Account 360 page for the account, click the Contacts tab.

The Contacts table for the account appears. It contains the following read-only fields.

Fields	Description
Name	The name of the contact.
Rank	Corresponds to the Market Potential field setting in Siebel CRM (High - 1, Medium - 2, or Low - 3).
Role	The role this contact plays in that particular account. This field is read-only.
Contact Number	The phone number for this contact.
Speciality	The field of specialization for the contact, for example, cardiology or neurosurgery.
Last Visited	The date of the last call for this contact.

- 2 Sort the Contact list by clicking the column headings in the table, and review the current information about the associated contact.

- 3 Add a new contact for the account as follows:

For Siebel CRM, drag the required contact from the Contacts quick list to the Contacts table for the account.

- 4 (Optional) To remove or disassociate an existing contact record from the account, click Delete (X) beside the contact record in the Contacts table.

This disassociation is also carried out in Siebel CRM when the next synchronization occurs. The contact record remains in the local database and in the Siebel CRM database.

## Displaying the Network Diagram to View Account Relationships

The network diagram provides a graphical view of the relationship between the account, the associated contacts, and the secondary accounts. The network diagram has three levels, with the current account as the node in the center. You can view second-level relationships as nodes linked to the account in the center. Both account relationships and contact-to-account relationships are displayed.

You can switch between a graphical view and a tabular view of this information by clicking Network or Table in the upper right corner of the Network page.

### *To display the network diagram to view account relationships*

- 1 From the Account 360 page, click the Network tab.  
The network diagram appears.
- 2 Review the information that is presented in the diagram. It contains the following information:
  - The summary nodes linked to the second-level nodes, showing the number of associated contacts and accounts at that level.
  - The account name and account location in the account nodes.
  - The contact's full name and job title in the contact nodes.
  - A navigation bar at the top of the diagram, with the current account name displayed indicating where you are in the network.
- 3 To view additional details from the network diagram, do one of the following:
  - Double-click the second-level account and contact nodes to display a summary information window for information on contacts and accounts that are directly related to the current account.
  - Click Table to change to the Relationships Detail view, which presents the relationship information in tabular format.
- 4 To add a contact relationship to the account, drag a contact from the quick list to the account node in the network diagram.  
The network diagram changes to a tabular view.

## **Reviewing the Call History Data**

The Call History page provides read-only information on products detailed in the last month, the current month, and the month before last month.

### *To review the call history data*

- 1 From the Account 360 page, click the Call History tab.
- 2 Sort the products detailed information by clicking the column headings in the Products Detailed table.
- 3 Review the information in the Products Detailed table.

## Preparing an Attendee Call

An Attendee Call is similar to a Contact Call but within the context of an account, which is parent to the attendee call. When products are detailed at the account call level, they are also visible at the attendee level. Sales representatives can drop samples or promotional items for each of the attendees. Complete the following procedure to prepare an attendee call.

**NOTE:** Attendee calls do not show up in the Calendar.

### *To prepare an attendee call*

- 1 Go to the account's Call Details page.
- 2 Click the Attendees tab in the Call Section, and then Add.  
All contacts affiliated with the account are displayed.
- 3 Drag and drop contacts as needed into the Attendees table.  
An Attendee Call is created in the background.





# 5

## Conducting Customer Calls

This chapter describes how to conduct customer calls. It includes the following topics:

- [Conducting Calls for Contacts on page 41](#)
- [Recording Contact Signatures on page 46](#)
- [Conducting Calls for Accounts on page 48](#)

### Conducting Calls for Contacts

You can manage a customer contact call from the Professional Call page, which includes a number of tabbed views:

- **Call Details.** Displays the Call Detail page, where you can record specific information about the call. The Call Details page is displayed by default.
- **Samples.** Displays the Samples page, where you can manage information on product samples that you might drop to the contact.
- **Promo Items.** Displays the Promotional Items page, where you can manage information on promotional items that you might drop to the contact.
- **Detail Products.** Displays the Detail Products page, where the product details reviewed with a customer are maintained.
- **Presentations.** Displays a presentation that shows the product details to a contact.

The following buttons appear at the bottom of the Professional Call:

- **Launch Detailer.** Displays the Detailer Start page with the Personal Content Delivery presentation. For detailed information on using the Detailer see [Chapter 6, "Delivering a Personalized Content Delivery Presentation."](#)

By default, Launch Detailer is inactive if any of the following conditions apply:

- There is no appointment scheduled.
- The appointment has already been submitted.
- **Get Signature.** Displays the signature capture function.

By default, Get Signature is inactive if any of the following conditions apply:

- There is no appointment scheduled.
- The appointment has been signed or submitted.
- The appointment due date is not today's date.
- There are no samples dropped.

- **Submit.** Changes the activity status to Submitted and prevents further editing of the Call page.

By default, Submit is inactive if any of the following conditions apply:

- There is no appointment scheduled.
- The appointment has been submitted already.
- The appointment due date is in the future.
- There are no detail products.
- One or more dropped samples exist but do not have a signature.

## Displaying the Professional Call Page

You can display the Professional Call page using the following procedure.

### *To display the Professional Call page*

- 1 From the Sales application banner, click Call Activity.

You can also click a scheduled call for a contact on the calendar, or click a vCard for a contact in the Call Plan area.

- 2 Expand the Professional Call page at the bottom by clicking the right arrow or clicking the Professional Call title bar.

The Contact Detail page is minimized, enabling you to view the expanded Professional Call page. You can view the basic call details in the Professional Call banner and the current contact for the call in the Contact banner.

## Entering or Updating Professional Call Details

To enter or update the details of the call on the Call Details page, complete the following procedure.

### *To enter or update call details*

- 1 From the Professional Call page, click the Call Details tab.
- 2 Update any of the editable fields for the key call information by clicking the field and entering information as required. The following table describes the fields.

**NOTE:** When you click an editable field, picklists, text boxes, and date selectors appear automatically depending on the field type.

Field	Description
Account	The account that is associated with this contact. This field is read-only.

Field	Description
Address	The contact's street address.  For Siebel CRM, you can only read existing associations between address and contact by default.
City	The contact's city. This field is read-only
State	The contact's state or province. This field is read-only.
Postal Code	The contact's postal code. This field is read-only.
Work	The contact's work phone number. This field is read-only.
Cell	The contact's mobile phone number. This field is read-only.
Description	Additional information about the call.
Start Date	The start date and time for the call.
End Date	The end date and time for the call.
Duration	The duration of the call, which is equal to the difference between the call's end time and the start time. This field is read-only.
Objective	Describes the reason for the call.  For Siebel CRM, this is a menu list.
Status	The status of the call, which can be Planned, Signed, or Submitted. This read-only status field is changed when users click Get Signature or Submit.
Type	The call type, such as Call, Approval, To Do, Presentation, Approval.
Cost	The costs associated with the call.
Next Call	The objective for the next call.

## Working with Samples Dropped to a Contact

You can review, update, or remove the samples dropped to a contact in the Samples Detail page.

### *To work with the samples dropped to a contact*

- 1 From the Professional Call page, click the Samples tab.

The Samples table that records the dropped samples appears on the left side of the Samples page, and the list of available samples appears on the right side.

- 2 In the Available Samples section, select the check box for the product sample that you want to drop to this contact from the list of available drugs.

You can click the left and right arrows to scroll through the available sample inventory records. You can select the filter check boxes to show all products or a combination of individual products. By default, all products are selected. You can deselect product check boxes to hide the product

from the Available Samples list. You can select the All check box to list all available sample inventory records.

- 3 Drag the required sample inventory records from the Available Samples section to the Samples table.

For Siebel CRM, the Sample table displays the following information, which is added from the sample inventory record:

- Lot number
- Product Name

- 4 Sort the information in the Samples table by clicking the column headings in the table.
- 5 Change the quantity in the Sample table by clicking the quantity value in the table and entering the new value.

You can also use the left and right arrows to increase or decrease the quantity. The quantity cannot exceed the maximum quantity specified by the sample inventory record.

- 6 To remove an existing sample from the table, click Delete (X) beside the record in the table.

## Working with Promotional Items Dropped to a Contact

You can review, update, or remove the promotional items dropped to a contact in the Promotional Items Detail page.

### *To work with promotional items dropped to a contact*

- 1 From the Professional Call page, click the Promo Items tab.

On the Promotional Items page, the Promotional Items table that records the promotional items dropped to a contact appears on the left side, and the list of available promotional items appears on the right side.

- 2 In the Available Promotional Products section, drag the required promotional products to the Promotional Products table.

The Available Promotional Products section lists the promotional product inventory records. In the upper right of each promotional product inventory record, the top number is the maximum number of promotional products that can be given out in one customer call, for example, 1. The bottom number is the maximum number of promotional products that are available, for example, 10. You can click the left and right arrows to scroll through the available promotional product inventory records.

For Siebel CRM, the Promotional Products table displays the Lot number and Product name.

- 3 Sort the information in the Promotional Products table by clicking the column headings in the table.

- 4 Change the quantity in the Sample table by clicking the quantity value in the table, and entering the new value.

You can also use the left and right arrows to increase or decrease the quantity. The quantity cannot exceed the maximum quantity specified by the promotional product inventory record.

- 5 To remove an existing promotional product from the table, click Delete (X) beside the record in the table.

## Working with Product Details

You can review, update, or remove the product details for the current call in the Detail Products page.

**NOTE:** Only products with *indications* show up in the Detail Products page. It is important that the administrator creates *product and indication combinations*, otherwise the products will not show up in the Detail Products page. Indications record, for example, the purpose or therapeutic area for which a drug is designed.

### *To work with product details*

- 1 From the Professional Call page, click the Detail Products tab.

On the Detail Products page, the Detail Products table that records the products detailed during a call appears on the left side, and the list of available products to be detailed appears on the right side.

- 2 In the Available Detail Products section, drag the required products to the Detail Products table to add the detail products.

The Available Detail Products section lists the available detail products by the product brand logos. You can use the left and right arrows to scroll through the available detail product records.

The Detail Products table displays the following information, which is added from the detail product record:

- **Product.** The name of the product, for example, the name of a drug.
- **Indication.** The medical condition that the product addresses. Examples are: Allergy, Asthma, Arrhythmia, Heart Failure, and so on.
- **Priority.** A numeric field to indicate the importance of the product.

The priority of the detail product displays the next available number by default, starting with 1 if no detail products are associated with the call.

- 3 (Optional) Change the value of the indication field using the indication list and the priority of the product.
- 4 Sort the information in the Detail Products table by clicking the column headings in the table.
- 5 To remove an existing detail product from the table, click Delete (X) beside the record in the table.

## Reviewing Presentation Items Shown to a Contact

You can review presentation items shown to a contact in the Presentations Detail page after the call has completed.

### *To review presentation items shown to a contact*

- 1 From the Professional Call page, click the Presentations tab.
- 2 On the Presentations tab, review the following information:
  - **Presented Assets.** Thumbnail visuals depicting the digital assets shown to the contact during the selected Professional Call.
  - **Sequence.** Thumbnail visuals that are sequenced in the order in which they were shown to the contact during the selected Professional Call.
  - **Rating.** The perceived contact reaction captured and recorded by the Sales Representative during the selected Professional Call. The perceived contact reaction is recorded by selecting 1 through 5 stars associated with each digital asset shown to the contact.
- 3 Navigate through the presentation by clicking the left or right arrows.

## Recording Contact Signatures

After you have entered all required information for the call, in particular, the samples data, you can obtain the contact's signature to verify the receipt of product samples.

**NOTE:** Conversion of signatures is supported on Microsoft Windows only.

### *To record a contact signature*

- 1 From the Professional Call page, click Get Signature.

The Signature Capture page appears in full screen mode. It covers the entire screen. This page contains the product signing message overlaid with the signature capture section.

The product signing message references the product detail allocation order. By default, the first signing message plan and plan item are displayed according to the Product Detail Allocation Order By value for the contact.
- 2 (Optional) To change the product signing message:
  - a Click Cancel on the Signature Capture page.
  - b Double-click the hot spot in the Detailer.
  - c Choose the new message plan.
  - d Click Get Signature to display the Signature Capture page again.

- 3 Review the following call and sample information in the Signature Capture section for the contact or signee:
  - Contact name and call date
  - Account name and address and license
  - Samples dropped information
  - Contact's license information
- 4 Change the contact signee, if required, by clicking Swap Signee.
- 5 Add any samples, if required, by clicking Add, and then do the following:
  - a Click an item in the Available Samples list to select that sample.

The list of available samples is similar to the dropped samples list for the contact.
  - b Click OK to add the selected item to the sample list for signing, and return to the Signature Capture page.
- 6 Remove any samples, if required, by clicking Delete (X) beside the sample.
- 7 If the application must be locked before requesting a signature from a contact, click Lock to lock the Signature Capture screen before you pass the device to the contact.

You can cancel the signature capture process at any time by clicking Cancel.
- 8 Transfer the device to the contact or signee for sign-off.
- 9 The contact or signee does the following:
  - a Reviews the information in the Signature Capture section.
  - b Clicks the signing area using a computer pen or stylus and signs her signature by writing on the screen.

After the contact clicks the signing area, the Save and Clear buttons are enabled and the Cancel, Add, and Swap Signee buttons are disabled.

The contact can click Clear to clear the signing area and re-enable the Add samples, Swap Signee, and Cancel buttons.
  - c Clicks Save to save the signature and related information.

The Signature Capture page closes and returns to the Professional Call page.
  - d Returns the device.
- 10 When the numeric pad appears, the user enters a four-digit security code or pin.

The user later unlocks the application by reentering the code.

## Conducting Calls for Accounts

You can manage a customer account call from the Account Call page, which includes a number of views:

- **Call Details.** Displays the Call Detail page, where you can record specific information about the call. The Call Details page appears by default.
- **Attendees (for Siebel CRM).** Displays the Attendees table for the account.  
**NOTE:** Attendees are the people attending a meeting or participating in a call.
- **Detail Products.** Displays the Detail Products page, where additional product details are maintained.

The following buttons are available along the bottom of the Call page:

- **Launch Detailer.** Displays the Detailer Start page with the Personal Content Delivery presentation. For detailed information on PCD presentations, see [Delivering a Personalized Content Delivery Presentation on page 53](#).

By default, Launch Detailer is inactive if any of the following conditions apply:

- There is no appointment scheduled.
- The appointment has already been submitted.
- There is no contact assigned to this account call.
- **Submit.** Changes the activity status to Submitted, and prevents further editing of the Call page.

By default, Submit is inactive if any of the following conditions apply:

- There is no appointment scheduled.
- The appointment has been submitted already.
- There is no contact assigned to this account call.
- The appointment due date is in the future.
- There are no detail products.
- One or more dropped samples exist but do not have a signature.

## Displaying the Account Call Page

You can display the Account Call page using the following procedure.

### *To display the Account Call page*

- 1 From the home page, do one of the following:
  - Click a scheduled account call on the calendar.
  - Click an account vCard in the Call Plan area.



- Expand the Account Call page at the bottom by clicking the right arrow or clicking anywhere on the Account Call title bar.

The Account Detail page is minimized, enabling you to view the expanded Account Call page. You can view the basic call details in the Call banner and the current account for the call in the Account banner.

## Entering or Updating Account Call Details

To enter or update the details of the call on the Account Call Detail page, complete the following procedure.

### *To enter or update account call details*

- From the Account Call page, click the Call Details tab.
- Update any of the editable fields for the key call information by clicking that field and entering your information, as listed in the following table.

**NOTE:** When you click an editable field, picklists, text boxes, and date selectors appear automatically depending on the field type.

Field	Description
Account	The account that is associated with this call. This field is read-only.
Address	The account's street address.  For Siebel CRM, you can only read existing associations between address and account by default.
City	The account's city. This field is read-only.
State	The account's state or province. This field is read-only.
Postal Code	The account's postal code. This field is read-only.
Work	The account's work phone number. This field is read-only.
Cell	The account's mobile phone number. This field is read-only.
Description	Additional information about the call.
Start Date	The start date and time for the call.
End Date	The end date and time for the call.
Duration	The duration of the call, which is equal to the difference between the call's end time and the start time. This field is read-only.
Objective	The objective of the call.
Status	The status of the call, which can be Planned, Signed, or Submitted. This read-only status field is changed when users click Get Signature or Submit.
Type	The call type, such as Call, Approval, To Do, Presentation, Approval.

Field	Description
Cost	The costs associated with the call.
Next Call	The objective for the next call.

- 3 Click Submit.

## Working with Related Contact Information

If using Siebel CRM, complete the following procedure to review, add, or remove the related contact information for the account.

### *To work with related Siebel CRM account information*

- 1 From the Account Call page, click the Attendees tab.  
The Attendees table for the account call appears. It contains the following fields:
  - **Name.** The name of the attendee.
  - **Contact Number.** The telephone number for the attendee.
  - **Last Visited.** The date of the last visit to the attendee.
- 2 Sort the Attendee list by clicking the column headings in the table.
- 3 Review the current information about the associated attendee.
- 4 To add a new attendee for the account:
  - a Click Add.  
Clicking Add changes the Accounts quick list to a subset of the Contact quick list that contains contacts belonging to the account.
  - b Drag the required contact to the Attendees table for the account.
- 5 (Optional) To remove an existing contact record for the account call, click Delete (X) beside the attendee record in the Attendees table.

## Working with Product Details

You can review, update, or remove the product details for products in the Detail Products page.

### *To work with product details*

- 1 From the Account Call page, click the Detail Products tab.

On the Detail Products page, the Detail Products table that records the products detailed during a call appears on the left side, and the list of available products to be detailed appears on the right side.

- 2 In the Available Detail Products section, drag the required products to the Detail Products table to add the detail product allocations in the call.

The Available Detail Products section lists the available detail products by the product brand logos. You can use the left and right arrows to scroll through the available detail product records.

The Detail Products table displays the following information, which is added from the detail product allocation record:

- **Product.** The name of the product, for example, the name of a drug.
- **Indication.** The medical condition that the product addresses. Examples are: Allergy, Asthma, Arrhythmia, Heart Failure, and so on.
- **Priority.** A numeric field to indicate the importance of the product

The priority of the detail product displays the next available number by default, starting with 1 if no Detail Products are associated with the call.

- 3 (Optional) Change the value in the indication field using the indication list and the priority of the product.
- 4 Sort the information in the Detail Products table by clicking the column headings in the table.
- 5 To remove an existing detail product from the table, click Delete (X) beside the record in the table.



# 6

## Delivering a Personalized Content Delivery Presentation

This chapter describes how to use PCD presentations in the Offline Client for Life Sciences. It includes the following topics:

- [About PCD Presentations on page 53](#)
- [Detailer Start Page on page 53](#)
- [Viewing Message Plans on page 54](#)
- [Starting a Message Plan Presentation on page 54](#)
- [About Message Plan Presentations on page 55](#)
- [About Marking Up a Presentation on page 56](#)
- [Detail Summary Page on page 57](#)

### About PCD Presentations

The Offline Client for Life Sciences enables you to present interactive, promotional content to clients during live calls. PCD (Personal Content Delivery) presentations allow you to demonstrate information about products and obtain signatures from clients for presentations and samples.

### Detailer Start Page

The Detailer Start page is the main page used to set up and start presentations.

The Detailer Start page has the following sections:

- **Live Call.** This section displays the contact with whom you are engaged in the live call. To conduct a live call, drag and drop a contact from the Contact quick list to the Live Call section. You can add a contact to the placeholder before, during, or after you conduct the live call.
- **Products.** This section lists the products available to present to your clients.
- **Messages for.** This section displays a list of message plans associated with specific products.

For Siebel CRM, Message Plans are associated with a catalog. A user can see the Message Plan if that user has access to the catalog.

## Viewing Message Plans

This topic describes how to view a message plan when scheduling live calls in the Sales application.

### *To view a message plan*

- 1 Click Detailer on the application banner at the top.
- 2 From the Products section, click the product for which you want to view a message plan.  
The Products section displays the title and brief introductory text for the available products. When you select a product from the list, the section displays a list of message plans associated with that product.
- 3 Expand the *Messages for* section at the bottom by clicking the right arrow to expand and show the message plan viewing options and to become more familiar with the message plan content and layout.

You can click one of the following buttons to change the viewing format:

- **Thumbnail.** This format displays thumbnail images from the presentation horizontally along the top of the *Messaging for* section. This format also displays Related and Detailed messages, which are associated with the presentation.
- **Preview.** This format displays thumbnail images from the presentation vertically to the right of the *Messaging for* section, with a preview screen on the right of the thumbnail images.
- **Carousel.** This format displays thumbnail images singularly. You can view the images by clicking the arrows to the left and right of the *Messaging for* section.
- **Fullscreen.** The presentation opens in full-screen mode within the *Messaging for* section. You can navigate the presentation by clicking the screen.

## Starting a Message Plan Presentation

You can initiate a message plan presentation to a prospective client from the Detailer page in the Sales application. The Messages For section from where you start a message plan presentation contains the following subsections:

- **Message Plan Sequence.** Displays the sequence of message plan items available to show during a presentation.
- **Related Messages.** Displays related messages, which are message plan items. They are not sequenced as part of the primary message plan presentation order. They are related to a defined message plan item and provide reference points or additional levels of information regarding the primary topic of the message plan item.
- **Detailed Messages.** Displays detailed messages, which are message plan items. They are not sequenced as part of the primary message plan presentation order. They are a reference to more detailed information about the defined message plan item.

### *To start a message plan presentation*

- 1 Click Detailer on the application banner.
- 2 From the Products section, find the product for which you want to start a message plan presentation.
- 3 Find the message plan presentation you want to demonstrate from the Products section.
- 4 Do one of the following:
  - In the Products section, click Launch for your selected message plan presentation.
  - Expand the Messages For section, and click Launch for your selected message plan presentation.

The Offline Client for Life Sciences starts your selected message plan presentation.

## About Message Plan Presentations

After you start your message plan presentation, you can interrupt the presentation by double-clicking the screen to activate the following buttons:

- **Launch the presentation.** Closes all other options and starts the presentation.
- **# of Physicians.** Allows you to increase the number of attending physicians during a presentation. When you select Number (#) of Physicians, a placeholder is created, which stores the metrics captured from the time when the placeholder was created. When the presentation is finished, a summary page appears, which requires the user to select customers who will be associated with the placeholders created during the presentation.
- **Disclosure.** Enables you to display a predefined disclosure message during the presentation. This message is defined during the message planning setup. The Detailer enables you to revert to this message at any point during the detailing session.
- **Show markup.** Enables you to mark up the presentation. It displays a marker instead of a cursor.
- **Signature.** Displays the Signature Capture page. You can select this option before or during a presentation. When you select Signature, you are prompted for the following values:
  - **Physician Name.** It is recommended that you enter a name in this field as part of the precall activity. When the license credentials are authenticated; that is, if the license is recorded and active for the selected contact, the physician name entered in this field appears in the Signature Capture dialog box. The signature for the selected physician will be captured if the following conditions are satisfied:
    - The license credentials must be valid for the state or jurisdiction where you are dropping the samples.
    - You must have the specified quantities of the samples.
    - The call must not be in the future.
  - **Sample Name.** The name of the sample. It is recommended that you enter the sample name as part of the call-planning activity. This field is read-only.

- **Lot#.** The lot number for the sample. This field is read-only.
- **Quantity.** You can update this row, as required. It is recommended that you enter a value in this field as part of the precall activity.

When you have entered the information for the signature, you can capture, save, cancel or clear an existing signature. After these activities are completed, the Signature Capture dialog box closes.

You can optionally lock the signature that you just captured by clicking Lock in the lower left corner of the Signature dialog box. When you click Lock, a numeric keypad appears and prompts you for a key code. This code is used to prevent customers from any further navigation or activity when you hand over the computer for signature capture. When the computer is returned to you, you can enter the key code and unlock the presentation.

- **Available Message Plans.** Displays a list of the other available message plans.
- **Left arrow.** Use the left arrow to navigate backwards in the message plan.
- **Currently selected Message Plan.** The highlighted item indicates the message plan that appears.
- **Right arrow:** Use the right arrow to navigate forward in the Message Plan.
- **Exit:** Use to exit the message plan and to return to the main Sales application screen.

## About Marking Up a Presentation

This topic gives guidelines on how to use the mark up tools in the presentation.

- The Offline Client for Life Sciences application displays a marker instead of a cursor. To display this marker, use on-screen writing for tablets or slates, and point and click for laptop PCs.
- When you have completed all required markups, the user must lift the stylus from the screen, or stop clicking the mouse, otherwise markups will persist.
- You can erase markups, by double-tapping the screen to display the navigation menu. This displays an Erase option instead of the Markup option. Click Erase and all markups disappear.
- You cannot save and forward markups. You cannot use the undo feature while markups are present on the screen. The markups must be erased to continue.



## Detail Summary Page

When the presentation is complete, or if you close the presentation, the Delivery Summary screen appears in the Sales application. You can perform the following tasks on this page:

- View the initial contact intended for the live call.
- View attendees who were subsequently invited and included to participate in the live call. These additional attendees are identified with a placeholder vCard. You can populate the vCard with a name by using the drag-and-drop functionality in Oracle's Offline Client for Life Sciences.
- View presentation metrics, such as total session time, and the name of the product and message plan demonstrated to the client.
- Note for how long each section or asset of the presentation was viewed.
- Verify if samples were dropped during the presentation.
- Verify if signatures were captured during the presentation.
- Submit all captured information for later synchronization with Siebel CRM as required.



# 7

## Working with the Asset Message Planner

This chapter describes how to use the Asset Message Planner (AMP) application, which enables marketing and sales operations users to manage assets and message plans. It includes the following topics:

- [Navigating the User Interface on page 59](#)
- [Working with Assets on page 60](#)
- [Working with Message Plans on page 63](#)

### Navigating the User Interface

The interface for the AMP application has the same appearance as the Sales application. The home page has four sections:

- **Application banner and tabs.** The banner that appears along the top of the interface persists across all views. It includes the following buttons:
  - **Asset Management.** Displays the Asset Management palette on the right side of the screen.
  - **Message Planning.** Displays the Message Planning palette on the right side of the screen.
  - **Recents.** The list of recently accessed Asset or Message Plan records.
- **Quick bar (left side).** Contains the following tabs along the top:
  - **File Browser.** Allows you to find unique assets on your computer and add them to the palette.
  - **Solutions.** Allows you to find preconfigured asset solutions for use in an electronic detailing presentations.
  - **Messages List.** Allows you to view existing message plans that are stored on your computer. The components of a message plan or message plan items are displayed on the bottom of the quick bar. You can view a message plan by clicking Review beside the message plan.  
  
You can minimize or expand the quick bar to provide a larger working area on the screen by clicking the left arrows (<<) or right arrows (>>).
- **Palette area (upper right).** Contains the palette for working with assets or message plan items, depending on the current view.
- **Detail area (lower right).** Provides details of the asset or message plan that is in the palette area.

## Working with Assets

Use the Asset Management palette to work with assets, such as image files, presentation files, and so on. An asset is any digital file that can be used in the AMP tool for use in a presentation.

### Adding Assets to the Asset Management Palette

Add an asset, such as an image file, to the Asset Management Palette using the following procedure.

#### *To add assets to the Asset Management palette*

- 1 Click the Asset Management tab to display the Asset Management palette.
- 2 Click File Browser in the quick bar to open the file browser.
- 3 Find your asset, for example a .swf file, by expanding the drives and directories, and navigate to where the asset is on your computer.
- 4 Drag and drop the asset to the Asset Management palette.

### Selecting the Asset Types to Display

You can change the asset types displayed in the Asset Management palette by completing the following procedure.

#### *To select the asset types that you want to display*

- From the Asset Management palette, select one of the following filters from the list at the top of the palette to isolate your search for an asset:
  - **All.** Displays all assets in the Asset Management palette.
  - **Message.** Displays assets of the type Message.
  - **Thumbnail.** Displays assets of the type Thumbnail.
  - **Component.** Displays assets of the type Component.

A *component* is an asset that is contained within another asset. For example, a picture of a physician might be a component asset of an invitation to an event asset. Using asset components, you can change the components to change the overall message or the appearance of the message.

## Changing Your View of the Assets

Use the following procedure to change your view of the assets.

### *To change your view of the assets*

- Select one of the following views from the palette:
  - **Thumbnail.** Displays assets as thumbnail graphics in the palette area.
  - **Preview.** Displays a preview of a selected asset in the palette area.
  - **Carousel.** Displays the assets in a carousel view.
  - **Fullscreen.** Displays a selected asset using your computer's full screen.

## Adding or Changing Asset Details

You can add asset details for a new asset or update the details for an existing asset.

### *To add or change asset details*

- 1 From the Asset Management palette, select an asset.
- 2 In the Asset Details section, click the Details tab.
- 3 Complete or update the fields in the following table.

Field	Description
Asset Name	The name of the asset, for example, My Product Profile. The asset name appears in the Asset banner at the top of the Asset Management palette.
Type	The type of the asset, which can be Message, Thumbnail, or Component.
Release Date	The date of release of the asset.
Expiration Date	The date on which the asset is no longer valid.
Description	A brief description of the asset.
Legal Approval	This check box indicates whether the asset has received legal approval or not.
Marketing Approval	This check box indicates whether the asset has received marketing approval or not.
Product	The name of the product corresponding to this asset.
Status	The status of the asset, which can be Approved or Unapproved.
Verification Status	The verification status for this asset, which can be Verified, Not Verified or Successful.

Field	Description
Distribution Method	<p>Designates the method by which the asset is sent to the user's computer from Siebel CRM. The values include:</p> <ul style="list-style-type: none"> <li>■ <b>Publish.</b> Automatically moves the asset to the user's computer when synchronization with Siebel CRM takes place.</li> <li>■ <b>By Request.</b> Automatically moves the asset metadata to the user's computer when synchronization with Siebel CRM takes place, but waits until the user clicks the selected asset to move the full asset file.</li> </ul>

**NOTE:** When you click an editable field, picklists, text boxes, and date selectors appear automatically depending on the field type.

## Working with Asset Components

Asset component files provide message creators and administrators the ability to reuse, reorder or switch out unique contents, or sections, within an individual asset. For example, an asset might be composed of three component files which can be assembled together within a larger properly constructed asset. Together, these four pieces make up an event invitation:

- Framework Asset: Background
- Component File 1: Text for invitation
- Component File 2: Picture of invitation location
- Component File 3: Background visuals for invitation

If an organization wants to reuse, or leverage, this uniquely assembled asset for a 2nd event, instead of recreating the entire asset, it can switch out Component File 1 with different text related to the 2nd event; the picture and background visuals can also be switched to different files. Component files are managed at the literature item level.

You can view the components for your assets from the Components tab.

### *To add components to an asset*

- 1 From the Asset Management palette, select an asset.
- 2 In the Asset Details section, click the Components tab.
- 3 Locate the file you want to add to the Components table from the File Browser tab or from the Solutions tab in the quick bar on the left.
- 4 Drag the file to the Components table.

You can remove the component from the table by clicking Delete (X) beside the component in the table.

### *To view asset components*

- 1 From the Asset Management palette, select an asset.
- 2 In the Asset Details section, click the Components tab.
- 3 Review the information in the Component Files table:
  - Name
  - File Name
  - Description

## Controlling Access to Assets

To allow specific user groups to view an asset, use the user group books in the User Groups tab to allow or restrict access.

### *To control access to an asset*

- 1 From the Asset Management palette, select an asset.
- 2 In the Asset Details section, click the User Groups tab.
- 3 Scroll through the list of available user groups listed in the Available Books section on the right, using the arrows.
- 4 Add access to the asset for a user group by dragging and dropping the group from the Available Books section to the Asset Security table on the left.
- 5 To remove existing access to an asset by a user group, click Delete (X) beside the user group entry in the Asset Security table.

## Working with Message Plans

Use the Message Plan palette to work with message plan item files.

## Reviewing Message Plans

You can review a message plan in the Message Plan palette using the following procedure.

### *To review a message plan*

- 1 Click Messages List at the top of the quick bar to display the available message plans in the top section of the quick bar.
- 2 Click the Message Planning tab at the top left side of the screen to display the Message Planning palette.

- 3 To preview a message plan from the list of available plans, select the plan in the quick bar.  
A preview of the message plan items for the selected message plan appears in the bottom section of the quick bar. You can scroll through the message plan items, using the arrows.
- 4 To review a message plan, select the plan from the list, and click Review.  
The message plan items are displayed in the Message Planning palette. The details for the message plan item are displayed in the Message Plan Details section.
- 5 Scroll through the message plan items, and review the details for the message plan.

## Changing Your View of Message Plan Items

You can change how you view the message plan items in the Message Planning palette and begin planning how you might present a message plan to a physician.

### *To change your view of message plan items*

- 1 From the Message Planning palette, select one of the following views from the top right of the palette:
  - **Thumbnail.** Displays message plan items as thumbnail graphics in the palette area.
  - **Preview.** Displays a preview of a selected message plan item in the palette area.
  - **Carousel.** Displays the message plan items in a carousel view.
  - **Fullscreen.** Displays a selected message plan item using your computer’s full screen.
- 2 You can change the order of the message plan items by dragging and dropping plan items on the palette in the sequence that you want.  
The plan items are automatically renumbered.

## Adding or Changing Message Plan Details

You can add or update message plan details in the Message Plan tab in the Message Plan Details section.

### *To add or change message plan details*

- 1 From the list of message plans in the quick bar on the left, select a plan, and then click Review.
- 2 In the Message Plan Details section, click the Message Plan tab.
- 3 Complete or update the following fields:

Message Plan Fields	Description
Name	The name of the message plan, for example, My Advanced Drug. This name appears in the Message Plan banner at the top of the Message Planning palette.



Message Plan Fields	Description
Type	The type of message plan. Examples are: Product Launch, Targeted Messaging, and Signature.
Release Date	The date of the message plan is made available.
Verification Status	The verification status for this asset. Examples are: Failed, Not Verified, and Successful.
Description	A brief description of the message plan.
Comments	Any other miscellaneous user notes.
Start Date	The date on which the message plan becomes valid and can be shown to customers.
Expiration Date	The date from which the message plan is no longer valid.
Disclosure	This check box indicates that a disclosure message plan item must be selected in the message plan. The check box on each message plan item in the palette area identifies which message plan item is the disclosure message.

**NOTE:** The fields for a message plan are common for all message plan items that make up a message plan. When you click an editable field, picklists, text boxes, and date selectors appear automatically depending on the field type.

## Selecting a Message Plan Item for Disclosure

Often, a messaging plan must be prefaced with a disclosure message or messages to make sure that there is full disclosure of all relevant information and that all legal and regulatory guidelines are satisfied.

**NOTE:** After selecting a message plan item for disclosure, you can change the selection by selecting the Set as Disclosure check box for an alternate message plan item. However, when a disclosure message is selected, your message plan must contain a message plan item disclosure selection. You can remove the disclosure selection by removing the disclosure message plan item from the message plan.

### *To select a message plan item for disclosure*

- 1 From the list of message plans in the quick bar on the left, select a plan, and then click Review.
- 2 In the Message Plan palette, select the message plan item that you want to set as the disclosure message.
- 3 Click Set as Disclosure at the bottom of the palette.

The check box on the message plan item indicates that the message plan item is the disclosure message.

## Controlling Access to Message Plans

To allow specific user groups to view a message plan, use the user group books on the User Groups tab to allow or restrict access.

### *To control access to a message plan*

- 1 From the list of message plans on the left, select a plan, and then click Review.
- 2 In the Message Plan Details section, click the User Groups tab.
- 3 Scroll through the list of available user groups listed in the Available Books section on the right, using the arrows.
- 4 Add access to the asset for a user group by dragging and dropping the group from the Available Books section to the Message Plan Security table.
- 5 To remove existing access to a message plan by a user group, click Delete (X) beside the user group entry in the Message Plan Security table.

## Viewing Solutions for Message Plans

You can use the Solution tab to view preconfigured solutions, which can be included in message plans.

### *To view solutions for message plans*

- 1 Click the Solutions tab.
- 2 Select a solution from the list, and then click Review on the solution vCard.
- 3 Review the solution and the associated metadata in the viewing palette area.

# Index

## A

### access to

- assets in AMP application 63
- message plans in AMP application 66

### account

- Account 360 page 36
- finding from search query 35
- quick list 19
- selecting from quick list 34
- updating profile 36

### account call

- Account 360 page 36
- Account Call page 48
- call history data 38
- conducting 48
- creating from Sales home page 35
- network diagram 37
- preparing for 36
- related contact information 37, 50
- updating call details 49
- updating information in account profile 36
- working with product details 51

### account profile, updating 36

### adding

- address information 30
- assets using AMP application 60
- best call times 31
- license information 30
- related account information 29
- related contact information 37, 50

### address information, updating 30

### alphabetic bar in Sales application 19

### AMP application

- adding assets 60
- changing asset details 61
- changing details of message plan 64
- changing view of assets 61
- changing view of message plan items 64
- controlling access to assets 63
- controlling access to message plans 66
- installing 11
- overview 9
- reviewing message plan 63
- selecting a message plan item for disclosure 65
- selecting asset types to display 60
- starting 16

user interface 59

viewing solutions for message plans 66

working with asset components 62

working with assets 60

working with message plan 63

### application banner area of Sales

application 19

### applications, uninstalling 12

### assets

adding using AMP asset management palette 60

changing details in AMP application 61

changing view in AMP application 61

controlling access in AMP application 63

displaying types in AMP application 60

working with AMP application 60

working with components in AMP application 62

### authenticating users 12

### automated data synchronization 13

## B

### best call times, adding or updating 31

## C

### calendar

month view 22

section in Sales application 21

week view 22

### call details, updating 42, 49

### call history data

reviewing for account calls 38

reviewing for contact calls 34

### Call Plan area in Sales application 20

### calls

displaying a summary 25

planned for today 25

### changing

asset details in AMP application 61

message plan details 64

message plan item view 64

### checking planned calls 25

### components of the Offline Client for Life Sciences 9

### conducting calls

for accounts 48

for contacts 41

**connectivity**

- to Siebel CRM 16
- with network 13

**contact**

- Contact 360 page 28
- finding from search query 26
- quick list 19
- recording signatures 46
- selecting from quick list 26
- updating profile 29

**contact call**

- address information 30
- best call times 31
- call history data 34
- conducting 41
- Contact 360 page 28
- creating from Sales home page 27
- license information 30
- network diagram 31
- network diagram (second-level) 33
- network diagram (third-level) 33
- planning 26
- preparing for 27
- Professional Call page 42
- profile summary for other contacts or accounts 32
- recording contact signatures 46
- related account information 29
- reviewing presentation items 46
- updating call details 42
- updating information in contact profile 29
- working with product details 45
- working with promotional items dropped 44
- working with samples dropped 43

**creating**

- a contact call 27
- an account call 35

**D****data synchronization** 12

- automatic 13
- incremental 14
- manual 14

**Detailer**

- overview of message plan presentations 55
- Start page 53
- starting a message plan presentation 54
- Summary page 57
- viewing message plan 54

**disclosing a message plan item** 65**displaying**

- a call summary 25
- Account 360 page 36
- Account Call page 48

- account relationships 37
- assets types in AMP application 60
- Contact 360 page 28
- contact relationships 31
- network diagram 31, 37
- Professional Call page 42
- profile summaries 32
- second-level contact relationships 33
- second-level network diagram 33
- third-level contact relationships 33

**F****finding**

- account from a search query 35
- contact from a search query 26

**G****getting user assistance** 23**guide overview** 7**H****help information** 23**home page, Sales application** 19**I****incremental synchronization** 14**installation requirements** 10**installing**

- AMP application 11
- Sales application 11
- Sync application 10
- the Offline Client for Life Sciences 10

**introduction to**

- the guide 7
- the Offline Client for Life Sciences 9

**L****license information, adding or updating** 30**M****manual synchronization** 14**marking up a message plan presentation** 56**message plan**

- changing details in AMP application 64
- marking up a presentation 56
- reviewing in AMP application 63
- starting message plan presentations 54
- viewing 54
- working with, in AMP application 63

**message plan item**

- changing view in AMP application 64
- selecting for disclosure in AMP application 65

**message plan presentation**

- marking up 56
- overview 55

**message plans**

- controlling access to in AMP application 66
- viewing solutions in AMP application 66

**month view in Sales application calendar** 22**N****navigating**

- AMP application 59
- Sales application 19

**network connectivity sensing** 13**network diagram**

- viewing account relationships 37
- viewing contact relationships 31
- viewing second-level contact relationships 33
- viewing third-level contact relationships 33

**O****Offline Client for Life Sciences**

- components 9
- installation requirements 10
- installing 10
- installing the Asset Message Planner application 11
- installing the Sales application 11
- installing the Sync application 10
- overview 9

**overview**

- AMP application 9
- Detailer Start page 53
- message plan presentation 55
- of the Offline Client for Life Sciences 9
- Sales application 9
- Sync application 9
- the guide 7

**P****Personal Content Delivery (PCD)****Presentations** 53**planned calls**

- checking for today 25
- displaying a call summary 25
- for contacts 26

**preferences, setting** 23**preparing**

- for a contact call 27
- for an account call 36

**presentation items, reviewing** 46**product details, working with** 45, 51**Professional Call page** 42**profile summary for other contacts or accounts** 32**promotional items dropped, working with** 44**Q****quick list**

- overview 19
- using to select a contact 26
- using to select an account 34

**R****recording contact signatures** 46**related account information, updating** 29**related contact information, updating** 37, 50**reviewing**

- account call history data 38
- contact call history data 34
- message plans 63
- presentation items 46
- related account information 29
- related contact information 37, 50

**S****Sales application**

- alphabetic bar 19
- calendar section 21
- Call Plan area 20
- home page overview 19
- installing 11
- overview 9
- starting 16
- user interface 19

**Sales home page**

- creating account call 35
- creating contact call 27

**samples dropped, working with** 43**search query**

- using to find a contact 26
- using to find an account 35

**selecting**

- account from quick list 34
- contact from quick list 26

**sensing network connectivity** 13**setting user preferences** 23**Siebel CRM**

- connectivity to 16
- signing on 13
- synchronizing data 13

**signing on to Siebel CRM** 13**starting a message plan presentation** 54

**starting applications** 16

**Sync application**

installing 10

overview 9

**synchronization**

automated 13

data 12

incremental 14

manual 14

with Siebel CRM 13

## T

**tips for using the application** 23

## U

**uninstalling applications** 12

**updating**

account call details 49

account profile 36

address information 30

best call times 31

contact call details 42

contact profile 29

license information 30

product details 45, 51

promotional items dropped 44

related account information 29

related contact information 37, 50

samples dropped 43

**user**

assistance 23

authentication 12

setting preferences 23

**user interface**

AMP application 59

Sales application 19

## V

**verifying connectivity** 16

**viewing**

assets in AMP application 61

message plans 54

profile summaries information 32

solutions for message plans 66

## W

**week view in Sales application calendar** 22

**what is new in this release** 7

**working with**

asset components in AMP application 62

assets using AMP application 60

message plans 63