

## **Siebel CRM**

Siebel Mobile Guide: Connected

Siebel Innovation Pack 2015, Rev. D

**E52426-01**

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# Preface

This guide covers Siebel Mobile connected functionality.

## Audience

This guide is intended for users and developers.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

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## Related Documents

For more information, see the following documents on Oracle Technology Network:

- *Siebel Mobile Guide: Disconnected*
- *Configuring Siebel Open UI*
- *Siebel Installation Guide* for the operating system you are using

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<i>italic</i>	Italic type indicates book titles, emphasis, a defined term, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, code in examples, text that appears on the screen, or text that you enter.





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## What's New in This Release

This chapter describes new product features.

### What's New in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. D

Table 1–1 lists the changes in this revision of the documentation to support this release of Siebel Innovation Pack 2015.

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**Note:** Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

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**Table 1–1** *New Product Features in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. D*

Topic	Description
"Overview of Siebel Mobile Integration with Native Device Features" on page 4-20	Modified topic. This release of Siebel Mobile uses WkWebView for iOS devices (UIWebView was used previously), which improves performance and communication between application and web page.
"Customizing the Application Icons in the Siebel App" on page 4-23	New topic. Describes how to customize the icon associated with each application listed on the home page (Application List screen) of the Siebel app.
"Configuring the Siebel App on iOS and Android Devices" on page 4-24	Modified topic. Describes how to configure the Siebel app on iOS and Android devices.
"Clearing the Application Cache for Applications Using the Siebel App" on page 4-25	Modified topic. Describes how to clear the application cache for an application using the Siebel app on iOS or Android devices.
"Resetting the Host Server Using the Siebel App" on page 4-26	Modified topic. Describes how to reset the host server for an application using the Siebel app on iOS or Android devices.
"Managing Attachment Downloads Using the Siebel App" on page 4-26	Modified topic. Describes how to manage the download of attachments using the Attachment Download Management view in the Siebel app.

## What's New in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. C

Table 1–2 lists the changes in this revision of the documentation to support this release of Siebel Innovation Pack 2015, Patchset 6. The new features listed in Table 1–2 are available only if you install and deploy Innovation Pack 2015, Patchset 6 or later. For more information, see Siebel Patchset Installation Guides for Siebel Innovation Packs (Doc ID 1614310.1) on My Oracle Support.

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**Note:** Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

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**Table 1–2** *New Product Features in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. C*

Topic	Description
"Overview of Siebel Mobile Integration with Native Device Features" on page 4-20	Modified topics. The Siebel app is now supported on Android devices.
"Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 4-21	
"Using the Siebel Mobile Archive MAA File (Administrator Task)" on page 4-22	
"Configuring the Siebel App on iOS and Android Devices" on page 4-24	
"Clearing the Application Cache for Applications Using the Siebel App" on page 4-25	
"Resetting the Host Server Using the Siebel App" on page 4-26	
"Managing Attachment Downloads Using the Siebel App" on page 4-26	
"Configuring the Privacy Settings for Native Device Feature" on page 4-27	

## What's New in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. B

Table 1–3 lists the changes in this revision of the documentation to support this release of Siebel Innovation Pack 2015, Patchset 5. The new features listed in Table 1–3 are available only if you install and deploy Innovation Pack 2015, Patchset 5 or later. For more information, see Siebel Patchset Installation Guides for Siebel Innovation Packs (Doc ID 1614310.1) on My Oracle Support.

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**Note:** Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

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**Table 1–3 New Product Features in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. B**

Topic	Description
"Configuring the Number of Records Displayed on Mobile Devices" on page 4-11	New topic. Describes how you can configure the number of records displayed on mobile devices using the following Siebel CRM parameters: <ul style="list-style-type: none"> <li>HTML Number of Rows (applet parameter)</li> <li>NumberOfListRows (application parameter)</li> </ul>
"Viewing Call Planning Information" on page 5-2	Modified topic. The following options are available above the call planning calendar grid (Gantt Chart) in Siebel Mobile: 2, 4, Day, M/D, Save Template, Apply Template, and Go To Reporting.
"Customizing the Call Planning Calendar" on page 5-3	New topic. You format and customize the call planning calendar for your Siebel Mobile and Siebel desktop application in Siebel CRM.
"Using the PCD Viewer in Siebel Mobile" on page 5-29	Modified topic. The eDetailer Player has been renamed PCD Viewer.
Creating Literature Records in Siebel CRM Associating Literature Records With Messaging Plans in Siebel CRM Defining Access to, Releasing, and Defining Messaging Plans in Siebel CRM PCD Viewer APIs	Deleted topics. These topics moved to <i>Siebel Life Sciences Guide</i> .
"Performing Needs Analysis for Accounts" on page 9-5 "Performing Needs Analysis for Contacts" on page 9-15	Modified topic. The needs analysis interview from Oracle Policy Automation (OPA) consists of a series of views and questions, and its composition and structure varies according to the OPA Rule Base set up for your implementation of the selected type of needs analysis.
"Viewing Recommendation Information for an Account" on page 9-10 "Applying for Products for an Account" on page 9-10 "Managing Application Information for an Account" on page 9-12	New topics. The following views are new for Accounts: <ul style="list-style-type: none"> <li><b>Recommendations view.</b> From the Accounts, Recommendations view, you can initiate a new application capture process, start a Viewer using the Detail button (to present additional information about products and obtain feedback from customers about the presented content), and apply for products for the account.</li> <li><b>Applications view.</b> From the Accounts, Applications view, you can track applications for products, resume incomplete applications for products, and sign completed applications for products.</li> </ul>

**Table 1–3 (Cont.) New Product Features in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. B**

Topic	Description
"Viewing Recommendation Information for a Contact" on page 9-19 "Applying for Products for a Contact" on page 9-20 "Managing Application Information for a Contact" on page 9-21	New topics. The following views are new for Contacts: <ul style="list-style-type: none"> <li>■ <b>Recommendations view.</b> From the Contacts, Recommendations view, you can initiate a new application capture process, start a Viewer using the Detail button (to present additional information about products and obtain feedback from customers about the presented content), and apply for products for the contact.</li> <li>■ <b>Applications view.</b> From the Contacts, Applications view, you can track applications for products, resume incomplete applications for products, and sign completed applications for products.</li> </ul>
Chapter 10, "Oracle Policy Automation Integration Workflows for Siebel Finance"	New chapter describing the OPA workflows for Siebel Finance.

## What's New in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. A

Table 1–4 lists the changes in this revision of the documentation to support this release of the software.

**Note:** Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

**Table 1–4 New Product Features in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015, Rev. A**

Topic	Description
"Setting Up the Host Server for Siebel Mobile" on page 4-22	New topic. Describes how to set up the host server where Siebel Mobile connected applications are located. This is a required task if using Siebel Mobile version 2.0.
"Configuring the Siebel App on iOS and Android Devices" on page 4-24	Modified topic. Describes how to configure the Siebel Mobile Application Container (Siebel app) on an iOS device when using Siebel Mobile version 1.0 and Siebel Mobile version 2.0.
"Clearing the Application Cache for Applications Using the Siebel App" on page 4-25	Modified topic. Describes how to clear the application cache for applications when using Siebel Mobile version 1.0 and Siebel Mobile version 2.0.
"Resetting the Host Server Using the Siebel App" on page 4-26	New topic. Describes how to reset the server where Siebel Mobile connected applications are located.
"Managing Attachment Downloads Using the Siebel App" on page 4-26	New topic. Describes how to use the Attachment Manager Download view to manage the download of attachments when using Siebel Mobile version 2.0. The Attachment Manager Download view is not available in Siebel Mobile version 1.0.

## What's New in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015

Table 1–5 lists the changes in this revision of the documentation to support this release of the software.

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**Note:** Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

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**Table 1–5** *New Product Features in Siebel Mobile Guide: Connected, Siebel Innovation Pack 2015*

Topic	Description
"Displaying Account Details" on page 5-13 "Displaying Contact Details" on page 5-21	Modified topics. You can access the PCD Viewer from Accounts and Contacts (as well as from Calls and Messaging Plans) in the Siebel Mobile connected application for Siebel Pharma.
"Managing Messaging Plans" on page 5-29	New topic. Describes how to display messaging plan details and review the presentation item and related message information for messaging plans.
"Showing Presentations in Siebel Mobile" on page 5-30	Modified topic. The Detail button is now available on the following views in the Siebel Mobile connected application for Siebel Pharma: Call Details, Account Details, Contact Details, and Messaging Plans views.  During a presentation, you can view the list of contacts who are attending and add more contacts who join during the presentation session.
"Recording Responses to Presentations in Siebel Mobile" on page 5-32	Modified topic. You can capture feedback for each contact who attends a presentation (for contact calls only). Provided that you have not submitted the presentation feedback, you can suspend and save the presentation feedback and return to the presentation later to finish entering all contact feedback.
"Using the Home Page for Siebel Consumer Goods" on page 6-1	New topic. Describes how to view call planning information and schedule calls for accounts using the home page in the Siebel Mobile connected application for Siebel consumer Goods.
"Managing Accounts for Siebel Consumer Goods" on page 6-13	Modified topic. The following account views are new: Assets, Agreements, Invoices, Credit Memos, Merchandising Location, Returns, and Activities. The Retail Audit view has been deleted.
"Managing Inventory for Siebel Consumer Goods" on page 6-28	New topic. Describes how to display inventory details, record van information, and review reconciliation information for the inventory.
"Managing Cycle Counting for Siebel Consumer Goods" on page 6-30	New topic. Describes how to view cycle counts and perform a cycle count.



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## Overview of Siebel Mobile

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

- [Siebel Mobile Products](#)
- [About Siebel Mobile](#)
- [Requirements for Using Siebel Mobile](#)
- [System Requirements for Siebel Mobile](#)
- [MIT License](#)

### Siebel Mobile Products

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

- **Siebel Mobile Connected Applications.** Siebel Business Applications accessed from a browser on a mobile device, where the browser is connected to a Siebel Server. This is a new offering from Oracle which provides access to Siebel Business Applications, with its native look-and-feel, from tablets and smartphones.
- **Siebel Mobile Disconnected Applications.** Siebel applications accessed from a browser on a mobile device which synchronizes data directly to the browser client without use of additional software or a network connection. This is a new offering from Oracle which provides access to Siebel, with its native look-and-feel, from tablets and smartphones. The following applications are currently supported in disconnected mode: Siebel Pharma and Siebel Service.
- **Siebel Mobile Web Client and Siebel Remote.** A disconnected client and supporting data synchronized to the client without connection to the network. These applications provide intelligent transaction routing, data synchronization, and Store-and-Forward Messaging (SFM) capabilities. Siebel Remote works only on Microsoft® Windows™-based desktops, laptops, and tablets.

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**Note:** For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

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**Note:** Store-and-Forward Messaging is only supported for existing customers using SFM capabilities, and it is no longer available for new customers.

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- **Siebel Handheld Applications.** A disconnected client with data filtering, data synchronization, and Store-and-Forward Messaging capabilities. Siebel Handheld applications only run on Microsoft Windows Mobile 6.5.x operating system.
- **Siebel Wireless.** Siebel Business Applications delivered to client browsers that connect to a Siebel Server through a wireless network. Siebel Wireless runs on any phone that has an HTML browser.

Figure 2–1 illustrates the hardware platforms on which these products run. In Figure 2–1, form factors refers to the general capabilities, screen shapes, and sizes of the various devices shown in the illustration.

**Figure 2–1 Siebel Mobile Product Platforms**

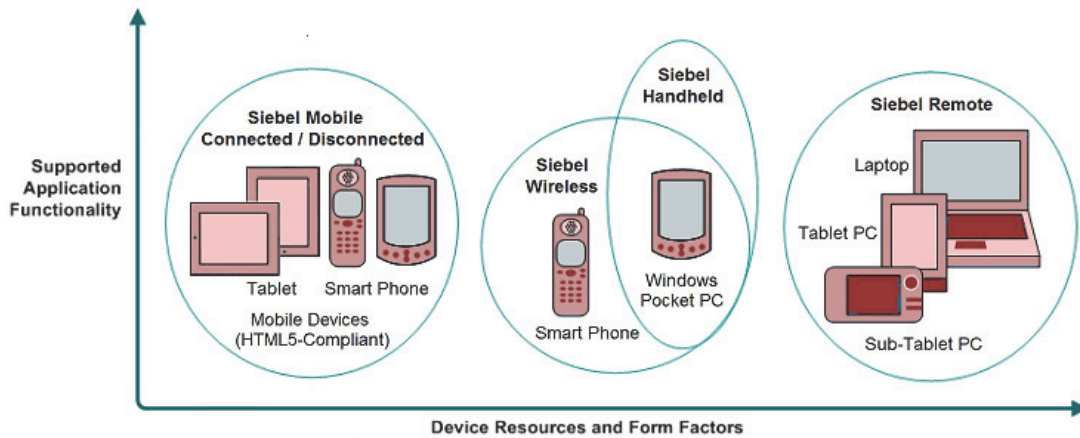


Table 2–1 describes the software components of Siebel Mobile, and the supported hardware devices.

**Table 2–1 Siebel Mobile Product Software Components and Supported Devices**

Product Group	Server Components	Client Component	Supported Client Devices
Siebel Mobile Connected	Siebel Mobile application in online mode (that is, connected to Siebel Server)	Client browser. For more information, see <a href="#">"Requirements for Using Siebel Mobile"</a> on page 2-5.	Mobile devices with HTML5-compliant browsers. For information about Certifications, see Article ID 1492194.1 on My Oracle Support.
Siebel Mobile Disconnected	Siebel Mobile application in offline mode (that is, disconnected from Siebel Server) Synchronization Object Manager	Client browser. For more information, see <a href="#">"Requirements for Using Siebel Mobile"</a> on page 2-5.	Mobile devices with HTML 5-compliant browsers. For information about Certifications, see Article ID 1492194.1 on My Oracle Support.
Siebel Remote	Siebel Remote Store-and-Forward Messaging	Siebel Mobile Web Client  Note that Siebel Mobile Connected and Siebel Mobile Disconnected are not related to the Siebel Mobile Web Client in any way.	Desktop PCs Laptops Tablets



**Table 2–1 (Cont.) Siebel Mobile Product Software Components and Supported Devices**

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

Table 2–2 describes the supported applications of Siebel Mobile, and documentation on the Siebel Bookshelf for information about these applications.

**Table 2–2 Siebel Mobile Product Supported Applications and Related Documentation**

Product Group	Supported Applications	Related Documentation
Siebel Mobile Connected	Siebel supports Responsive Web Design, so any Siebel desktop application will work from any device. For example, the following applications are supported: <ul style="list-style-type: none"> <li>■ Siebel Pharma</li> <li>■ Siebel Consumer Goods</li> <li>■ Siebel Sales</li> <li>■ Siebel Service</li> <li>■ Siebel Finance</li> </ul>	If using Siebel Mobile in online mode only, then see the following: <ul style="list-style-type: none"> <li>■ <i>Siebel Mobile Guide: Connected</i></li> <li>■ <i>Configuring Siebel Open UI</i></li> <li>■ <i>Siebel Installation Guide</i> for the operating system you are using</li> </ul>
Siebel Mobile Disconnected	Siebel Pharma Siebel Service	If using Siebel Mobile in both online and offline mode, then see the following: <ul style="list-style-type: none"> <li>■ <i>Siebel Mobile Guide: Disconnected</i></li> <li>■ <i>Configuring Siebel Open UI</i></li> <li>■ <i>Siebel Installation Guide</i> for the operating system you are using</li> </ul>
Siebel Remote	Almost all Siebel Business Applications and Siebel Industry Applications  (Provides the same look-and-feel as those applications.)	<i>Siebel Remote and Replication Manager Administration Guide</i>  <i>Siebel Store-and-Forward Messaging Guide for Mobile Web Client</i>
Siebel Handheld Applications	Siebel Pharma Siebel Consumer Goods Siebel Sales Siebel Service Siebel Medical	<i>Siebel Pharma Handheld Guide</i> <i>Siebel Consumer Goods Handheld Guide</i> <i>Siebel Sales Handheld Guide</i> <i>Siebel Service Handheld Guide</i> <i>Siebel Medical Handheld Guide</i>  <i>Siebel Store-and-Forward Messaging Guide for Handheld</i>
Siebel Wireless	Siebel Sales Siebel Service Siebel Partner Relationship Management Siebel Self-Service Applications	<i>Siebel Wireless Administration Guide</i>

## About Siebel Mobile

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

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

The following applications are supported in connected (online) mode. For more information about Siebel Mobile connected applications, see *Siebel Mobile Guide: Connected* (this document).

- Siebel Mobile application for Siebel Pharma
- Siebel Mobile application for Siebel Consumer Goods
- Siebel Mobile application for Siebel Sales
- Siebel Mobile application for Siebel Service
- Siebel Mobile application for Siebel Finance

The following applications are supported in disconnected (offline) mode. For more information about Siebel Mobile disconnected applications, see *Siebel Mobile Guide: Disconnected*.

- Siebel Mobile application for Siebel Pharma
- Siebel Mobile application for Siebel Sales
- Siebel Mobile application for Siebel Service

The URL address that you use accesses a unique mobile-enabled Siebel Application Object Manager and renders the UI using jQuery. jQuery is a JavaScript library or framework that is designed to simplify client-side scripting that employs JavaScript code. Siebel uses jQuery extensively in its client code. For more information about jQuery, go to the jQuery Website at <http://jquery.com>.

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

- **Usability.** Siebel Mobile is designed for field sales and service users and are optimized to support frequent tasks in the sales and service cycle.
- **Productivity.** Siebel Mobile maximizes productivity by enabling you to find the relevant information easily and to complete important activities quickly.
- **Collaboration.** Siebel Mobile enables you to pass contact information to other contacts, employees, or account team members. When travelling, you can schedule meetings and calls with contacts, employees, account team members, and even account customers.

## Requirements for Using Siebel Mobile

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

- You must have a mobile device with an internet connection.
- The browser on your mobile device must support the following: HTML5, CSS 3.0 or higher, and JavaScript 1.5 or higher.
- You have reviewed the topics about Siebel Open UI and Siebel Mobile in the applicable *Siebel Installation Guide* for the operating system you are using.

## System Requirements for Siebel Mobile

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

- Apple® iOS devices (iPad®)
- Android Lollipop devices (Samsung Galaxy® tablets)
- Microsoft Windows 8 tablets

Oracle does not certify any specific device as Siebel Mobile is standards based, and supports any device with a HTML5-compliant browser.

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

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## MIT License

The print invoice capability in Siebel Mobile, which is available in the Siebel Mobile application for Siebel Service, is built using third-party open source embedded JavaScript (<http://embeddedjs.com/>) and uses MIT licensing.

```

=====
The MIT License (MIT)
Copyright (c) <year> <copyright holders>
Permission is hereby granted, free of charge, to any person obtaining a copy of
this software and associated documentation files (the "Software"), to deal in the
Software without restriction, including without limitation the rights to use,
copy, modify, merge, publish, distribute, sublicense, and/or sell copies of the
Software, and to permit persons to whom the Software is furnished to do so,
subject to the following conditions:
The above copyright notice and this permission notice shall be included in all
copies or substantial portions of the Software.
THE SOFTWARE IS PROVIDED "AS IS", WITHOUT WARRANTY OF ANY KIND, EXPRESS OR
IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS
FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT. IN NO EVENT SHALL THE AUTHORS OR
COPYRIGHT HOLDERS BE LIABLE FOR ANY CLAIM, DAMAGES OR OTHER LIABILITY, WHETHER IN
AN ACTION OF CONTRACT, TORT OR OTHERWISE, ARISING FROM, OUT OF OR IN CONNECTION
WITH THE SOFTWARE OR THE USE OR OTHER DEALINGS IN THE SOFTWARE.
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```

For more information about printing invoices, see the following topics:

- ["Printing Invoices Associated with an Activity"](#) on page 8-14
- ["Printing Invoices Associated with a Service Request"](#) on page 8-19
- ["Printing Invoices"](#) on page 8-26

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## Setting Up Siebel Mobile Connected Applications

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

- [Process of Setting Up Siebel Mobile Connected Applications](#)
- [Requirements for Setting Up Siebel Mobile Connected Applications](#)
- [Adding Object Managers for Siebel Mobile Connected Applications](#)
- [Adding Virtual Directories for Siebel Mobile Connected Applications](#)
- [Siebel Application Object Manager Parameters for Siebel Mobile Connected Applications](#)
- [Enabling the Handheld Component Groups for Siebel Mobile Connected Applications](#)
- [Assigning Responsibilities to Siebel Mobile Connected Application Users](#)
- [Customizing Siebel Mobile Connected Applications](#)
- [Copying and Deleting Siebel Mobile Connected Applications](#)
- [Troubleshooting Siebel Mobile Connected Applications](#)

### Process of Setting Up Siebel Mobile Connected Applications

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

1. Review ["Requirements for Setting Up Siebel Mobile Connected Applications"](#) on page 3-2
2. ["Adding Object Managers for Siebel Mobile Connected Applications"](#) on page 3-3
3. Review ["Siebel Application Object Manager Parameters for Siebel Mobile Connected Applications"](#) on page 3-6
4. ["Adding Virtual Directories for Siebel Mobile Connected Applications"](#) on page 3-4
5. ["Enabling the Handheld Component Groups for Siebel Mobile Connected Applications"](#) on page 3-6
6. ["Assigning Responsibilities to Siebel Mobile Connected Application Users"](#) on page 3-7
7. ["Customizing Siebel Mobile Connected Applications"](#) on page 3-13

## Requirements for Setting Up Siebel Mobile Connected Applications

This task is a step in "[Process of Setting Up Siebel Mobile Connected Applications](#)" on page 3-1. Before starting to set up your Siebel Mobile, you must meet the following requirements.

1. The installed software for Siebel Mobile is Siebel Innovation Pack 2015.  
Install Siebel Innovation Pack 2015 for new installations or for existing installations. For more information about new installations and migration installations for existing installations, see *Siebel Installation Guide* for the operating system you are using.
2. For a migration installation for an existing installation, run the Siebel Incremental Repository Merge to update your database to the latest Siebel CRM version 15.0.  
Running IRM is necessary after installing Siebel Innovation Pack 2015 as a migration installation for an existing 8.1.1.x/8.2.2.x installation. For more information about using Siebel Incremental Repository Merge, see *Siebel Database Upgrade Guide*.  
For new installations, running Siebel Incremental Repository Merge is not required. Install a new Siebel database for Siebel CRM version 15.0.
3. All standard Siebel Server and Siebel Web Server Extension (SWSE) configurations have been carried out before you run any Siebel Mobile scripts on the Siebel Server and SWSE.
  - **New installations.** Run the standard Siebel Server and SWSE Configuration Wizard tasks to create the object managers and virtual directories for the language or languages that you choose to deploy.
  - **Migration installations.** Run the scripts to add the object managers and virtual directories for new Siebel Mobile connected applications not present in any prior installation, for the existing installed and deployed languages. For Siebel Application Object Managers, run the object manager script for each language that you are deploying. For SWSE, run the virtual directory script once and specify all languages that you are deploying.
  - **Additional languages.** After a migration installation, run the object manager script once for each installed language. If you are adding a new language to an existing installation of Siebel Innovation Pack 2015, then run the object manager and virtual directory scripts for that language, but only after first completing all the standard tasks to install and deploy a new language as detailed in *Siebel Installation Guide* for the operating system you are using.

For more information, see the following procedures:

- "[Adding Object Managers for Siebel Mobile Connected Applications](#)" on page 3-3
- "[Adding Virtual Directories for Siebel Mobile Connected Applications](#)" on page 3-4

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**Note:** The Siebel Bookshelf is available on Oracle Technology Network

<http://www.oracle.com/technetwork/indexes/documentation/index.html> and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

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## Adding Object Managers for Siebel Mobile Connected Applications

This task is a step in "Process of Setting Up Siebel Mobile Connected Applications" on page 3-1 and is required under the following conditions:

- **For new installations.** The Siebel Application Object Managers are created by default in the language or languages selected during Siebel CRM installation. For example, if ENU and ESP are the languages selected, then the Siebel Application Object Managers shown in Table 3–1 are automatically added for ENU and ESP so it is not necessary to add them again. If you want to run your Siebel Mobile connected application subsequently in a new language, then you must run the `new_compdef_sia` script for each language that must be supported, but only after first completing all the standard tasks to install and deploy a new language.
- **For migration installations.** You must run the `new_compdef_sia` script to add the object managers for new Siebel Mobile connected applications not present in any prior installation, for each language that is installed and deployed on the Siebel Server.
- **For additional languages.** You must run the `new_compdef_sia` script after adding a new language on the Siebel Server, but only after first completing all the standard tasks to install and deploy a new language.

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**Note:** For more information about new installations, migration installations, and additional language installations, including the standard tasks to install and deploy a new language, see *Siebel Installation Guide* for the operating system you are using.

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**Table 3–1 Siebel Application Object Managers for Siebel Mobile**

Application	Application Object Manager
Siebel Mobile application for Siebel Pharma	ePharmamObjMgr_enu ePharmamObjMgr_esp
Siebel Mobile application for Siebel Consumer Goods	CGmObjMgr_enu CGmObjMgr_esp
Siebel Mobile application for Siebel Sales	SalesmObjMgr_enu SalesmObjMgr_esp
Siebel Mobile application for Siebel Service	ServicemObjMgr_enu ServicemObjMgr_esp
Siebel Mobile application for Siebel Finance	FinsmObjMgr_enu FinsmObjMgr_esp

The following procedure shows you how to run the `new_compdef_sia` script to add new object managers for Siebel Mobile connected applications. Running the script adds the object managers for the applications that are in the HandheldSync and HandheldSyncSIS component groups.

### To add object managers for Siebel Mobile

1. Stop the Siebel Server.
2. Stop the Siebel Gateway Name Server and make a backup of the `siebns.dat` file.
3. Restart the Siebel Gateway Name Server.

4. Set the SIEBEL\_HOME environment variable to the *SES\_HOME/siebsrvr* directory.
5. Navigate to the following folder from, for example, a command prompt:  
`SES_HOME/siebsrvr/bin/<LANG>`
6. Execute one of the commands shown in the following table, as required:

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

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

For more information, see ["Enabling the Handheld Component Groups for Siebel Mobile Connected Applications"](#) on page 3-6.

**Related Topic**

["Siebel Application Object Manager Parameters for Siebel Mobile Connected Applications"](#) on page 3-6

## Adding Virtual Directories for Siebel Mobile Connected Applications

This task is a step in ["Process of Setting Up Siebel Mobile Connected Applications"](#) on page 3-1 and is required under the following conditions:

- **For new installations.** The virtual directories are created by default in the language or languages selected during Siebel CRM installation. For example, if ENU and ESP are selected, then virtual directories are automatically added for ENU and ESP so it is not necessary to add them again. If you want to run your Siebel Mobile connected application subsequently in a new language, then you must run the `new_virdirs` script for each language that must be supported, but only after first completing all the standard tasks to install and deploy a new language.
- **For migration installations.** You must run the `new_virdirs` script to add the virtual directories for new Siebel Mobile connected applications not present in any prior installation, for the existing installed and deployed languages. For Siebel Web Server Extension (SWSE), run the script once and specify all languages.
- **For additional languages.** You must run the `new_virdirs` script after adding a new language on the Siebel Server, but only after first completing all the standard tasks to install and deploy a new language.

The following procedure shows you how to run the `new_virdirs` script to add virtual directories for Siebel Mobile connected applications. You create virtual directories on a particular Web server where SWSE is installed. You must create the virtual directories on every Web server that supports Siebel Mobile connected applications.



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**Note:** For more information about new installations, migration installations, and additional language installations, including the standard tasks to install and deploy a new language and how to create custom virtual directories, see *Siebel Installation Guide* for the operating system you are using.

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### To add virtual directories for Siebel Mobile using the new\_virdirs script

1. Stop the Web server.

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

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

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

3. From the EAPPWEB\_HOME/config directory, execute the new\_virdirs.sh or new\_virdirs.bat script with the appropriate parameters shown in the following table.

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

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**Note:** If execution of the new\_virdirs.sh or new\_virdirs.bat script fails, then you must restore all necessary files from the backup in Step 2.

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4. Restart the Web server.

Access the new components using the URL. For more information about the Siebel Mobile connected application URLs, see "Logging In to Siebel Mobile" on page 4-2.

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

This task is a step in "[Process of Setting Up Siebel Mobile Connected Applications](#)" on page 3-1.

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

The Siebel Application Object Manager parameter settings shown in [Table 3-2](#) are set by default, and are required for all Siebel Mobile connected applications.

**Table 3-2 Siebel Application Object Manager Parameters for Siebel Mobile**

Parameter Name	Parameter Setting
AppletSelectStyle	AppletSelectStyle="Applet Select"
EnableInlineForList	EnableInlineForList=Never
EnableOpenUI	EnableOpenUI=TRUE
EnableSIFocusTracking	EnableSIFocusTracking=TRUE
HighInteractivity	HighInteractivity=TRUE
ShowWriteRecord	ShowWriteRecord=TRUE

## Enabling the Handheld Component Groups for Siebel Mobile Connected Applications

This task is a step in "[Process of Setting Up Siebel Mobile Connected Applications](#)" on page 3-1. The handheld components for Siebel Mobile must be enabled on the supported Siebel Server. You can enable the handheld component groups for the following Siebel Mobile connected applications on Microsoft Windows:

- ePharma Mobile Object Manager (<Lang>)
- Consumer Goods Mobile Object Manager (<Lang>)
- Sales Mobile Object Manager (<Lang>)
- Service Mobile Object Manager (<Lang>)
- Finance Mobile Object Manager (<Lang>)

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

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

The following handheld component groups are returned:

- HandheldSync
- HandheldSyncSIS

- c. For each of these component groups, do the following:
  - Select the component group, and then click the Enable button.
  - In the Component Group Assignments applet, click the Enable button for the required Siebel Server.
- d. If required, go to the LifeSciences component group, and enable it as described in Step 1c.

---

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

---

2. Stop, and then restart the Siebel Server.

## Assigning Responsibilities to Siebel Mobile Connected Application Users

This task is a step in "[Process of Setting Up Siebel Mobile Connected Applications](#)" on page 3-1. A responsibility corresponds to a set of views to which users have access. The following procedure shows you how to assign views to a responsibility and then users to that responsibility.

### To assign responsibilities to Siebel Mobile users

1. Log in to the Siebel application as a user with administrator privileges.
2. Navigate to the Administration - Application screen, then the Responsibilities view.
3. Query for and select the appropriate responsibility or user role.  
For example, query for the following: PH Pharma Sales Rep - US Sales.
4. Select the Responsibilities tab, and then do the following:
  - a. In the lower Users applet, add users to the responsibility as required.
  - b. In the lower Views applet, add the appropriate views to the responsibility as required.

[Table 3-3](#) lists the application views that are added by default as part of the seed data for Siebel Mobile, so it is not necessary to manually add the views again.

**Table 3–3 Siebel Mobile Connected Application Views**

<b>Application</b>	<b>Default Views</b>
Siebel Mobile application for Siebel Pharma	LS Home Page Call View - Mobile
	LS Pharma Call Validation Results View - Mobile
	LS Pharma Call Signature Capture View - Mobile
	LS Pharma Signature Audit Administration View_PUI
	SIS HH Pharma Account Call Attendee View - Mobile
	SIS HH Pharma Professional Promotional Items View - Mobile
	SIS HH Pharma Professional Samples Dropped View - Mobile
	SIS HH Pharma Professional Call Products Detailed View - Mobile
	eDetailer Message Plan Preview View - Mobile
	eDetailer Presentation View - Mobile
	Pharma Call Literature View - Mobile
	Pharma Account List View - Mobile
	Pharma Account Contact View - Mobile
	Pharma Account Calls View - Mobile
	Pharma Account Addresses View - Mobile
	Pharma Account Affiliations View - Mobile
	Pharma Account Relationships View - Mobile
	Pharma Account Attachments View - Mobile
	Pharma Contact List View - Mobile
	Pharma Contact Call View - Mobile
	Pharma Contact Address View - Mobile
	Pharma Contact Best Contact Times View - Mobile
	Pharma Contact State Licenses View - Mobile
	Pharma Contact Affiliations View - Mobile
Pharma Contact Relationships View - Mobile	
Pharma Contact Attachments View - Mobile	

**Table 3–3 (Cont.) Siebel Mobile Connected Application Views**

<b>Application</b>	<b>Default Views</b>
Siebel Mobile application for Siebel Consumer Goods	CG Account Addresses View - Mobile
	CG Account Calls Views - Mobile
	CG Account Contacts View - Mobile
	CG Account List View - Mobile
	CG Account Notes View - Mobile
	CG Account Orders View - Mobile
	CG Account Product Audits View - Mobile
	CG Account Products View - Mobile
	CG Contact Addresses View - Mobile
	CG Contact Best Call Times View - Mobile
	CG Contact List View - Mobile
	CG Routes Accounts View - Mobile
	CG Routes List View - Mobile
	CG Call Account Assessment View - Mobile
	CG Call Account Notes View - Mobile
	CG Call Merchandising Audits View - Mobile
	CG Call Orders View - Mobile
	CG Call Retail Audit List View - Mobile
	CG Outlet Visit Activities List View - Mobile
	CG Visit Call Items List View - Mobile
	CG Order List View - Mobile
CG Return Order List View - Mobile	

**Table 3–3 (Cont.) Siebel Mobile Connected Application Views**

<b>Application</b>	<b>Default Views</b>
Siebel Mobile application for Siebel Sales	SHCE Account List View - Mobile
	SHCE Account Contacts View - Mobile
	SHCE Account Opportunity View - Mobile
	SHCE Account Address View - Mobile
	SHCE Account Activities View - Mobile
	SHCE Account Team View - Mobile
	SHCE Sales Contact List View - Mobile
	SHCE Sales Contact Opportunities View - Mobile
	SHCE Contact Team View - Mobile
	SHCE Contact Address View - Mobile
	SHCE Sales Lead List View - Mobile
	SHCE Sales Lead Opportunities View - Mobile
	SHCE Opportunities List View - Mobile
	SHCE Sales Opportunities Contacts View - Mobile
	SHCE Sales Opportunities Products View - Mobile
	SHCE Sales Opportunities Quotes View - Mobile
	SHCE Sales Opportunities Activities View - Mobile
	SHCE Sales Opportunities Opportunity Team View - Mobile
	SHCE Quote List View - Mobile
	SHCE Quote QuoteItem View - Mobile
	SHCE Quote Order View - Mobile
	SHCE Quote Team View - Mobile
	SHCE Sales Orders List View - Mobile
	SHCE Sales Order line Item View - Mobile
	SHCE Activity List View - Mobile
	SHCE Sales Activity Contact Form View - Mobile
	SHCE Sales Activity Employee Form View - Mobile

**Table 3–3 (Cont.) Siebel Mobile Connected Application Views**

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

**Table 3–3 (Cont.) Siebel Mobile Connected Application Views**

<b>Application</b>	<b>Default Views</b>
Siebel Mobile application for Siebel Finance	FINS Account List View - Mobile
	FINS Account Contacts View - Mobile
	FINS Account Opportunity View - Mobile
	FINS Account Address View - Mobile
	FINS Account Activities View - Mobile
	FINS Account Team View - Mobile
	FINS Company Financial Accounts View - Mobile
	FINS Contact List View - Mobile
	FINS Contact Opportunities View - Mobile
	FINS Contact Team View - Mobile
	FINS Contact Address View - Mobile
	FINS Contact Financial Accounts View - Mobile
	FINS Contact Notes View - Mobile
	FINS Contact Activity View - Mobile
	FINS My Application View - Mobile
	FINS Application View - Mobile
	FINS New Opportunities List View - Mobile
	SHCE Opportunities List View - Mobile
	SHCE Sales Opportunities Contacts View - Mobile
	SHCE Sales Opportunities Products View - Mobile
	SHCE Sales Opportunities Quotes View - Mobile
	SHCE Sales Opportunities Activities View - Mobile
	SHCE Sales Opportunities Opportunity Team View - Mobile
	FINS Households List View - Mobile
	FINS Household Contact View - Mobile
	FINS Household Notes View - Mobile
	FINS Household Activity View - Mobile
	FINS Household Opportunities View - Mobile
	FINS Household Financial Account View - Mobile
	FINS Household Address View - Mobile
	FINS Financial Accounts List View - Mobile
	FINCORP Account Service Request View - Mobile
	FINCORP Account Balance History Chart View - Mobile
	FINCORP Account Transaction Detail View - Mobile
	SHCE Activity List View - Mobile
	SHCE Sales Activity Contact Form View - Mobile
	SHCE Sales Activity Employee Form View - Mobile
	FINS HomePage View - Mobile
	FINS New Lead List View - Mobile



**Table 3–3 (Cont.) Siebel Mobile Connected Application Views**

Application	Default Views
Siebel Mobile application for Siebel Finance (continued)	SHCE Part Browser Substitute View - Mobile
	SHCE Sales Lead List View - Mobile
	SHCE Sales Lead Opportunities View - Mobile
	SHCE Service SR List View - Mobile
	SHCE Service SR Orders View - Mobile
	SHCE Service SR Activity View - Mobile
	SHCE Service SR Invoices View - Mobile
	UInbox My Inbox Item List View

## Customizing Siebel Mobile Connected Applications

This task is a step in "[Process of Setting Up Siebel Mobile Connected Applications](#)" on page 3-1.

You can use the Siebel Open UI framework, templates, and style sheets to configure the user interface and behavior of your mobile application to address your own particular business needs. You can customize the look-and-feel of your mobile application by modifying the JavaScript files. You can also deploy your own presentation models and physical renderers that might or might not use one or more third-party JavaScript plug-ins of your choice.

The following customizations are recommended:

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

For more information about the Siebel Open UI templates and style sheets, about how to customize the look-and-feel of your mobile application features, and about how to implement each of these recommendations, see *Configuring Siebel Open UI*.

### Related Topics

["Inline Editing"](#) on page 4-7

["Check Boxes"](#) on page 4-7

["Data Display"](#) on page 4-7

["Displaying Location Details in Siebel Mobile"](#) on page 4-16

["Configuring Application Settings for Siebel Mobile"](#) on page 4-13

## Copying and Deleting Siebel Mobile Connected Applications

You can copy and delete duplicate copies of mobile applications in Siebel CRM as shown in the following procedure. You should not delete any Siebel-provided applications. Note the following:

- When you copy a mobile application, the application plus all the associated child business component records are copied.
- When you delete a Siebel Mobile connected application, the application plus all the associated child business component records are deleted.
- Before deleting a mobile application, it is recommended that you make a copy of it first.

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**Note:** The Deep Copy and Deep Delete user properties are used to copy or delete records in Siebel Mobile. For more information about using Deep Copy and Deep Delete to copy and delete records in child business components, see *Siebel Developer's Reference*.

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### To copy and delete mobile applications in Siebel CRM

1. Log in to the Siebel Server using a user ID with a Siebel administrator responsibility.
2. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.
3. Create a copy of an existing mobile application as follows:
  - a. Select an application from the top applet. For example:  
Siebel ePharma Mobile (ENU)
  - b. Select Copy Record in the menu.  
A duplicate record is created for the mobile application with the same Name and Language Code.
  - c. In the Language Code field, select a different language code.
  - d. Verify that the copy was successful by checking the records in the following child applets: Object Definition, Modification Tracking, Business Component Filters, Business Object Filters, and Settings.
4. Delete a duplicate or a copy of a mobile application as follows, but do not delete any Siebel-provided applications:
  - a. Select an application from the top applet. For example:  
Siebel ePharma Mobile (ITA)
  - b. Select Delete Record in the menu, and then OK when prompted for confirmation to delete the selected mobile application record.  
The record is deleted from the list of mobile applications.

## Troubleshooting Siebel Mobile Connected Applications

Table 3–4 shows some common errors that users might encounter when trying to access and use Siebel Mobile connected applications on their mobile device.

**Table 3–4 Troubleshooting Siebel Mobile Connected Applications: Common Errors**

Problem	Cause	Solution
The application user interface is not displaying correctly on the mobile device.	The Siebel Mobile connected application is not rendering correctly.	Check the browser that is being used on your mobile device. For information about browser requirements, see <i>Deploying Siebel Open UI</i> .
The Siebel Mobile environment is not loading and a blank screen appears.	Private browsing is enabled for the browser on your mobile device.	Make sure that private browsing is not enabled for the browser on your mobile device. For more information, see "Disabling Private Browsing" on page 3-16.
<p>If you get errors similar to the following:</p> <pre> Tag: swe:nav-control is not valid in this context. . . . Error creating Parameter:HighInteractivity for Comp:ePharmaMObjMgr_ENU @ in CompGroup:HandheldSyncSIS Strict Flag set to FALSE, continuing with the next Object... Error creating Parameter:MobileApplication for Comp:ePharmaMObjMgr_ENU @ in CompGroup:HandheldSyncSIS Strict Flag set to FALSE, continuing with the next Object...</pre>	The Siebel Mobile connected application is not rendering correctly.	<p>Make sure that the Siebel Application Object Manager parameters are configured correctly for your Siebel Mobile connected application.</p> <p>To set the parameters again, run the <code>srvrMgr</code> command for your Siebel Application Object Manager. For more information, see "Siebel Application Object Manager Parameters for Siebel Mobile Connected Applications" on page 3-6.</p>

**Table 3–4 (Cont.) Troubleshooting Siebel Mobile Connected Applications: Common Errors**

Problem	Cause	Solution
<p>An error message similar to the following appears after selecting a value from a drop-down list:</p> <p>The applet field with name " . . . " does not exist (SBL-UIF-00289)</p>	<p>The User Agent settings for the web browser are incorrect.</p>	<p>The steps to modify the User Agent settings for the web browser are:</p> <ul style="list-style-type: none"> <li>■ Log in to the Siebel Business Application.</li> <li>■ Navigate to the Administration - Web Browser screen, then the Browsers view.</li> <li>■ Create a new browser by entering the browser name and version.</li> <li>■ Add the capabilities for the new browser. For example:                     <pre data-bbox="954 621 1373 905"> User-Agent = Mozilla/4.0 (compatible; &lt;browsername&amp;version&gt; Parent = &lt;browsenamer&amp;version&gt; Accept = image/gif, image/x-xbitmap, image/jpeg, image/pjpeg, application/vnd.ms-powerpoint, application/vnd.ms-excel, application/msword, */* JumpTab = True                     </pre> <p data-bbox="954 947 1373 1052">Note that although the User-Agent value looks incomplete without a closing (right bracket) parenthesis, this is the correct value.</p> </li> <li>■ After applying these Siebel client parameters, restart the Siebel Mobile connected application. No browser errors will be returned, no matter what parameters are set on the browser side.</li> </ul>

### Enabling JavaScript for Safari

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

#### To enable JavaScript for Safari

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

### Disabling Private Browsing

If after logging into Siebel Mobile, the application environment will not load and a blank screen appears, then make sure that private browsing is not enabled for the browser on your mobile device. Private browsing mode will block any browser cache from registering, and prevent Siebel Mobile, which depends on caching, from running.

The following procedure shows you how to disable private browsing in, for example, Safari on iPad.

#### To disable private browsing (for example, on iPad)

1. Tap Safari on the home screen of your iPad to start the browser.
2. Do one of the following as required:
  - a. If using Apple iOS 7, then disable private browsing as follows:
    - Tap Show Pages (the plus icon) in the lower right hand corner of the screen.
    - Tap Private in the lower left hand corner of the screen
    - If prompted to close or keep all current tabs open, select an option.
    - Tap Done in the lower right hand corner of the screen.

Private browsing is now disabled for the mobile device, and the background color of the Safari browser changes to white or light gray.

To enable private browsing for the mobile device, repeat this step again. When private browsing is enabled, the background color of the Safari browser is black or dark gray (and not white or light gray).

- b. If using Apple iOS 7.1 or later, then disable private browsing as follows:
  - Tap the URL field at the top of the screen.
  - When the keyboard opens, tap Private above the keyboard on the left hand side.
  - If prompted to close or keep all current tabs open, select an option.

Private browsing is now disabled for the mobile device, and the background color of the Safari browser changes to white or light gray. To enable private browsing for the mobile device, repeat this step again. When private browsing is enabled, the background color of the Safari browser is black or dark gray (and not white or light gray).

## Clearing the Browser Cache

The process of clearing the browser cache differs from browser to browser, but typically involves selecting an option to delete the cache or temporary files in your browser's administrative settings. After clearing your browser cache, refresh the page that you are viewing so that your browser can obtain the fresh files. The following procedure shows you how to clear the browser cache.

#### To clear the browser cache

1. On an iOS device (such as iPad):
  - a. Tap Settings, Safari, and then tap Clear Cookies and Data.
  - b. Tap Clear when prompted for confirmation to clear all cookies and data.  
This step clears all the cached data that was used to speed up browsing.
  - c. Refresh the page that you are viewing to obtain the latest files.
2. On an Android device (such as Samsung Galaxy tablet):
  - a. Open the Web browser on your mobile device.
  - b. Tap Menu, select Settings, tap Privacy and Security, and then to one or both of the following as required:

- Tap Clear all cookie data to clear all browser cookies.
- Tap Clear browser cache to delete locally cached content and databases.
- c. Refresh the page that you are viewing to obtain the latest files.

## Checking the Browser Cache Size

To successfully use Siebel Mobile in offline mode, you must have a minimum of 50 megabytes (MB) of available storage on your mobile device. The following procedure shows you how to check the browser cache size in Safari on iPad so that you are within the cache limit and how to delete the Web site data if required. The procedure is similar on Android devices.

### To check the browser cache size (for example, on iPad)

1. Tap Settings, Safari, Advanced, and then tap Website Data.  
Review the amount of data stored for each Web site and the total amount of Web site data stored on your iPad.
2. Remove the data for any Web site whose data has been updated recently or is no longer required as follows:
  - Tap Edit.
  - Select the Web site whose data you want to remove, and then tap Delete.

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## Getting Started with Siebel Mobile Connected Applications

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

- [Logging In to Siebel Mobile](#)
- [Navigating the Siebel Mobile User Interface](#)
- [Managing Records in Siebel Mobile](#)
- [Reviewing Notification Messages in Siebel Mobile](#)
- [Configuring Application Settings for Siebel Mobile](#)
- [Displaying Location Details in Siebel Mobile](#)
- [Running Predefined Queries in Siebel Mobile](#)
- [Scanning Barcodes in Siebel Mobile](#)
- [Using Attachments in Siebel Mobile](#)
- [Starting an External Application from Siebel Mobile](#)
- [Printing from Siebel Mobile](#)
- [Integrating Siebel Mobile with Native Device Features](#)
- [Logging Out of Siebel Mobile](#)

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**Note :** For more detailed information about Siebel Pharma, Siebel Consumer Goods, Siebel Sales, Siebel Service, and Siebel Finance, see the appropriate guide on the Siebel Bookshelf. For example:

- *Siebel Life Sciences Guide*
  - *Siebel Consumer Goods Guide*
  - *Siebel Applications Administration Guide*
  - *Siebel Order Management Guide*
  - *Siebel Marketing User Guide*
  - *Siebel Field Service Guide*
  - *Siebel Finance Guide*
- 
-

## Logging In to Siebel Mobile

This topic describes how to log in to Siebel Mobile on your mobile device.

### To log in to Siebel Mobile

1. Start the browser on your mobile device.
2. Type the URL address for the Siebel Mobile connected application in the following format:

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

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

```
http://www.localhost.com/epharmam_enu/start.swe
http://www.localhost.com/cgm_enu/start.swe
http://www.localhost.com/salesm_enu/start.swe
http://www.localhost.com/servicem_enu/start.swe
http://www.localhost.com/finism_enu/start.swe
```

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

3. Type your login credentials, for example, as follows:

```
UserID: JSmith
Password: password
```

4. (Optional) Tap the HTML5 Browser Compatibility link on the login screen to show your browser's compatibility with HTML5 features.

HTML5 is a core technology markup language of the Internet and is used to structure and present content on the Web. If an HTML5 feature is not compatible with your browser, then you can tap the question mark icon to review more information about that feature and about the limitations that you might experience in the Siebel CRM application because of its incompatibility.

5. Tap Login.

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

6. If this is your first time logging in to the application, then accept the Siebel Mobile End User License Agreement when prompted; otherwise, you will not be able to continue.

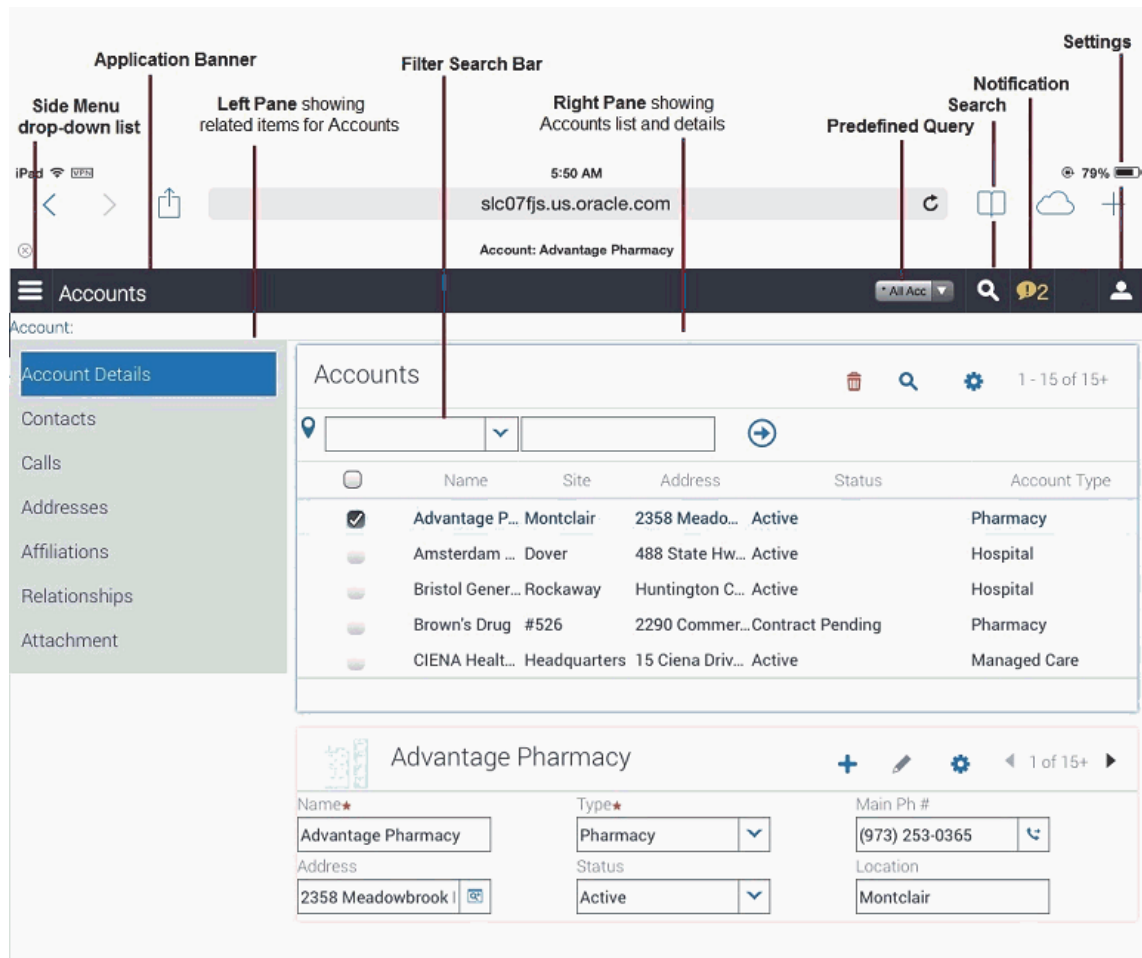


## Navigating the Siebel Mobile User Interface

The application user interface for Siebel Mobile is divided into three areas: The application banner, the left pane, and the right pane. The callouts in [Figure 4-1](#) show these three areas.

If you navigate away from the Siebel Mobile application in online or offline mode and then return to the application, then the application reloads. The current application context is also maintained even after the application reloads. You can navigate away from the mobile application by, for example, selecting a URL link from within the application on your iPad or switching to another application.

**Figure 4-1 Siebel Mobile User Interface: Application Banner, Left and Right Panes**



**Note :** If using the Siebel App on an iOS or Android device to access Siebel Mobile applications, then the following icons appear on the top, right side of the screen (under the application banner): Refresh, Attachment, and Home. For more information about these icons and about using the Siebel app to log in to an application, see "[Configuring the Siebel App on iOS and Android Devices](#)" on page 4-24.

## Application Banner

The application banner appears along the top of the UI, and it persists for all views. The Side Menu is available on the left side of the application banner and the following options are available on the right side as shown in [Figure 4-1](#): PDQ (Predefined Query) drop-down list, Search, Notification, Airplane, and Settings.

- **Side Menu.** Tap the Side Menu icon to display the Siebel Objects available in the mobile application. Selecting any Siebel object redirects you to a screen where you can manage the selected Siebel object. [Table 4-1](#) shows the Siebel objects that are typically available from the Side Menu for each Siebel Mobile connected application.
- **PDQ.** Tap the drop-down list to display a list of the available predefined queries, which you can run for the object selected from the Side Menu. For more information, see "[Running Predefined Queries in Siebel Mobile](#)" on page 4-17
- **Search.** Tap the magnifying glass icon to perform a search. For more information, see "[Searching for Records in Siebel Mobile](#)" on page 4-9.
- **Notification.** Tap the exclamation mark icon to display notification messages. For more information, see "[Reviewing Notification Messages in Siebel Mobile](#)" on page 4-11.
- **Settings.** Tap the photo icon to configure the behavior of and notifications for Siebel Mobile connected applications, or to log out of Siebel Mobile connected applications. For more information, see "[Configuring Application Settings for Siebel Mobile](#)" on page 4-13.

## Left Pane

The left pane, on the left side of the UI, typically displays the related item information according to the object that is selected from the Side Menu. In [Figure 4-1](#) for example, Accounts is selected from the Side Menu and the related items for Accounts are as follows: Contacts, Calls, Addresses, Affiliations, Relationships, and Attachment.

## Right Pane

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

- If you tap the Side Menu icon on the application banner and select Accounts, then the following context information appears in the work area:
  - **Object List.** The Accounts list appears at the top of the screen in the work area.
  - **Object Details.** The details for the selected account appear below the Accounts list.
- If you tap the Side Menu icon on the application banner and select Accounts, select an account from the Accounts list in the work area, select Calls from the related items for the account in the left pane, then the following context information appears in the work area:
  - **Selected Object Details.** The details for the selected account appear at the top of the screen.
  - **Selected Related Item List.** The Calls associated with the selected account appear next.

**Table 4–1 Siebel Objects Available from the Side Menu on the Application Banner**

Application	Siebel Objects
Siebel Mobile application for Siebel Pharma	The following Siebel objects are typically available from the Side Menu on the application banner: Calls, Accounts, and Contacts. For more information, see <a href="#">Chapter 5, "Using the Siebel Mobile Connected Application for Siebel Pharma."</a>
Siebel Mobile application for Siebel Consumer Goods	The following Siebel objects are typically available from the Side Menu on the application banner: Calls, Contacts, Accounts, Routes, Orders, and Returns. For more information, see <a href="#">Chapter 6, "Using the Siebel Mobile Connected Application for Siebel Consumer Goods."</a>
Siebel Mobile application for Siebel Sales	The following Siebel objects are typically available from the Side Menu on the application banner: Accounts, Contacts, Leads, Opportunities, Quotes, Orders, and Activities. For more information, see <a href="#">Chapter 7, "Using the Siebel Mobile Connected Application for Siebel Sales."</a>
Siebel Mobile application for Siebel Service	The following Siebel objects are typically available from the Side Menu on the application banner: Activities, Service Requests, Accounts, Browser, Orders, Invoices, Assets, and Shifts. For more information, see <a href="#">Chapter 8, "Using the Siebel Mobile Connected Application for Siebel Service."</a>
Siebel Mobile application for Siebel Finance	The following Siebel objects are typically available from the Side Menu on the application banner: Accounts, Contacts, Opportunities, Households, Financial Accounts, Activities, and Service Requests. For more information, see <a href="#">Chapter 9, "Using the Siebel Mobile Connected Application for Siebel Finance."</a>

## Navigating Siebel Mobile in Landscape Mode

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

### To navigate Siebel Mobile in landscape mode

1. Start the browser on your mobile device.
2. Type the URL address for the Siebel Mobile connected application, and then log in to the application as shown in "[Logging In to Siebel Mobile](#)" on page 4-2.

The Siebel Mobile home page appears immediately after logging in, and it is the starting point for using the application. The following interface elements are present on the home page in landscape mode:

- **Application banner.** Appears along the top of the home page, and it persists for all views. For more information about the options available on the application banner, see "[Application Banner](#)" on page 4-4.
  - **Left pane.** Displays related item information according to the object that is selected from the Side Menu on the application banner.
  - **Right pane (work area).** Displays context information according to the selection that you make from the Side Menu on the application banner, the left pane, and in the UI in general.
3. To navigate away from the current list and details view, tap the Side Menu icon on the application banner and choose another Siebel object.

4. To search for records in Siebel Mobile, see ["Searching for Records in Siebel Mobile"](#) on page 4-9.
5. To create, modify, or delete records in Siebel Mobile, see ["Managing Records in Siebel Mobile"](#) on page 4-7.
6. To log out of Siebel Mobile, see ["Logging Out of Siebel Mobile"](#) on page 4-28.

## Navigating Siebel Mobile in Portrait Mode

You navigate Siebel Mobile in portrait mode in much the same way as in landscape mode, except for one difference. The home page displays only the application banner and the work area by default. That is, there is only one pane in portrait mode.

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

### To navigate Siebel Mobile in portrait mode

1. Start the browser on your mobile device.
2. Type the URL address for the Siebel Mobile connected application, and then log in to the application as shown in ["Logging In to Siebel Mobile"](#) on page 4-2.

The Siebel Mobile home page appears immediately after logging in, and it is the starting point for using the applications. The following interface elements are present on the home page in portrait mode:

- **Application banner.** Appears along the top of the home page, and persists for all views. For more information about the options available on the application banner, see ["Application Banner"](#) on page 4-4.
  - **Work area.** Displays context information according to the selection that you make from the Side Menu on the application banner and in the UI in general.
3. To navigate away from the current view, tap the Side Menu icon on the application banner and choose another Siebel object.
  4. To search for records in Siebel Mobile, see ["Searching for Records in Siebel Mobile"](#) on page 4-9.
  5. To create, modify, or delete records in Siebel Mobile, see ["Managing Records in Siebel Mobile"](#) on page 4-7.
  6. To log out of Siebel Mobile, see ["Logging Out of Siebel Mobile"](#) on page 4-28.

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

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

- Tap an editable field in the application to automatically display one of the following, according to the field type: drop-down list, text box, or date selector.  
  
A star icon beside a field name indicates that the field is a required field. Some required fields have a default value, other required fields display an error if no value is entered.
- Tap anywhere on a drop-down list field to open the drop-down list.
- Select multiple options from an associated drop-down list.  
  
Tap once to select an option. Tap the same option again to deselect the option.
- Tap a record to open and display the record details.

- Tap a related item belonging to a record to open the related item.
- Close a dialog box by tapping anywhere outside the dialog box.
- Double-tapping is supported in Siebel Mobile.  
For example, you can close a dialog box by double-tapping the selected entry in the dialog box.

## Inline Editing

Inline editing is configured by default in Siebel Mobile and allows you to do the following:

- Edit fields directly on Form (detail) and List applets without opening the Edit page for the record.
- Edit fields in tables, windows and dialog boxes, and in many linked records on main record Form (detail) applets.

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

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

After you edit the fields in a record, you must navigate away from the record to save your changes to it.

## Check Boxes

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

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

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

## Data Display

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

## Managing Records in Siebel Mobile

This topic contains the following information:

- ["Creating Records in Siebel Mobile"](#) on page 4-8
- ["Linking Records to Your Selected Record"](#) on page 4-8
- ["Searching for Records in Siebel Mobile"](#) on page 4-9
- ["Modifying Records in Siebel Mobile"](#) on page 4-9
- ["Deleting Records in Siebel Mobile"](#) on page 4-9
- ["About the Cogwheel Icon in Siebel Mobile"](#) on page 4-9
- ["Reviewing Record Summary Information"](#) on page 4-10

- ["Displaying the Total Number of Records"](#) on page 4-10
- ["Creating Bookmarks in Siebel Mobile"](#) on page 4-10
- ["Formatting the Columns to Display in the List View"](#) on page 4-10
- ["Configuring the Number of Records Displayed on Mobile Devices"](#) on page 4-11

## Creating Records in Siebel Mobile

You can add a record using the plus (+) icon or create a new record using the double plus (++) icon from different areas within Siebel Mobile.

When you add or create records, note the following about data entry:

- You can type information directly into some fields, or select values from a drop-down list.
- When you tap some fields, another dialog box appears from which you can select values or type values.
- For some fields that already have a value, you can tap an icon to the right of the field to display a window from which you can select values or type values.

For example, you can tap the pin icon to display location details. For more information, see ["Displaying Location Details in Siebel Mobile"](#) on page 4-16.

- A star icon beside a field name indicates that the field is a required field.

### To add or create records in Siebel Mobile

1. From any page within your Siebel Mobile connected application, tap the plus (+) icon or the double plus (++) icon.
2. Type in the details for the new record.
3. Save the record.

## Linking Records to Your Selected Record

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

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

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

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

## Searching for Records in Siebel Mobile

You can perform a global search in Siebel Mobile by tapping the magnifying glass icon, shown in [Figure 4-1](#), on the application banner. Elsewhere in Siebel Mobile, you can search or query for records provided that a search control has been configured in Siebel Tools for the specific view or applet in question.

If you do not see a magnifying glass icon or a search bar when you navigate to a view or applet in Siebel Mobile, then a search control has not been configured in Siebel Tools for that particular view or applet.

You perform searches in Siebel Mobile in the same way that you perform searches in Siebel CRM. For more information about querying and searching for records in Siebel CRM, see *Siebel Fundamentals Guide for Siebel Open UI*. For more information about configuring Siebel search controls, see *Siebel Search Administration Guide*.

## Modifying Records in Siebel Mobile

Use the following procedure to modify records in Siebel Mobile.

### To modify records

- From any Form (detail) applet within Siebel Mobile, do the following:
  - Tap the record field that you want to update, and update the field value. You might not be allowed to update all fields in the record.
  - Navigate away from the record or tap Save to save your changes to it.

## Deleting Records in Siebel Mobile

The following procedure shows you how to delete records in Siebel Mobile. Users can delete the records that they own only in online mode. The delete button is disabled for business components that are marked as Owner Delete.

### To delete records

1. Navigate to and select the record that you want to delete.
2. Tap the dustbin icon and then tap Yes when prompted for confirmation to delete the record.

In list format, you can also swipe (from left to right) over the record you want to delete and then tap Delete.

## About the Cogwheel Icon in Siebel Mobile

A cogwheel icon typically appears on all list and detail pages in Siebel Mobile. The following options are available when you select the cogwheel icon, but you can configure other options for the cogwheel menu as required by using Siebel Tools:

- **About Record.** See "[Reviewing Record Summary Information](#)" on page 4-10.
- **Record Count.** See "[Displaying the Total Number of Records](#)" on page 4-10.
- **Create Bookmark.** See "[Creating Bookmarks in Siebel Mobile](#)" on page 4-10.
- **Columns Displayed.** See "[Formatting the Columns to Display in the List View](#)" on page 4-10.

For more information about configuring the cogwheel menu for Siebel Mobile, see *Configuring Siebel Open UI*.



## Reviewing Record Summary Information

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

### To review record summary information in Siebel Mobile

1. Navigate to and select the record whose summary information you want to review.
2. Tap the cogwheel icon in the work area and then select About Record.  
The summary information for the selected record appears and includes the following data:
  - The date when the record was created and by whom
  - The last date the record was updated and by whom
  - The number of modifications that have been made to the record
3. Tap OK to close the record summary information.

## Displaying the Total Number of Records

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

### To display the total number of records in a parent object

1. Navigate to the parent object view that you want by doing one of the following:
  - Tap the Side Menu icon on the application banner and then select an object from the drop-down list.
  - Tap the Side Menu icon, select an object from the drop-down list, and then a related item from the left pane.
2. Tap the cogwheel icon in the work area and then select Record Count.  
The total number of records in the parent object is returned.
3. Tap OK to close the record count information.

## Creating Bookmarks in Siebel Mobile

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

### To create bookmarks in Siebel Mobile

1. From any page or view within Siebel Mobile, tap the cogwheel icon, and then select Create Bookmark.  
A dialog box opens showing the URL address for the current page.
2. Copy the URL address and save it elsewhere (for example, in an email).
3. Tap OK to close the dialog box.

## Formatting the Columns to Display in the List View

Use the following procedure to specify the columns to appear in the list view and in what order. Columns Displayed option is available on list pages only. Columns Displayed is not available on detail pages.



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

1. Navigate to the object view that you want by doing one of the following:
  - Tap the Side Menu icon on the application banner and then select an object from the drop-down list.
  - Tap the Side Menu icon, select an object from the drop-down list, and then a related item from the left pane.
2. Tap the cogwheel icon in the work area and then select Columns Displayed.
3. In the dialog box that opens, do the following:
  - a. Use the left and right arrows to move the column items between the Selected Columns list and the Available Columns list.
  - b. Use the up and down arrows to reorder the Selected Columns list.
  - c. Save the changes when finished.

**Configuring the Number of Records Displayed on Mobile Devices**

In Siebel CRM, you can configure the number of records displayed on mobile devices at the applet or application level using the following parameters:

- **HTML Number of Rows (applet parameter).** Specifies the number of rows that Siebel CRM displays in the user interface for a particular list applet. If this parameter is not set (or is empty), then Siebel CRM uses the value specified in the NumberOfListRows parameter in the application configuration file to determine the number of rows to display in the UI. For more information about the HTML Number Of Rows applet parameter, see the topic about Applet in Siebel Object Types Reference.
- **NumberOfListRows (application parameter).** Specifies the default number or records or rows to display per page on mobile devices. This parameter applies or is used only when a given applet's HTML Number of Rows parameter is not set. For more information about the NumberOfListRows application parameter, see the topic about configuring the number or records displayed per page in *Siebel Wireless Administration Guide*.
- If neither the HTML Number of Rows applet parameter nor the NumberOfListRows application parameter are set, then Siebel CRM displays 10 records by default.

To facilitate smooth scrolling in list applets on mobile devices, the Siebel CRM client framework fetches three times the number of records specified by the HTML Number of Rows applet parameter or the NumberOfListRows application parameter. This keeps a buffer of records on the client which is higher than the displayed number of records so that the client does not have to go to the server every time a small scroll occurs. If neither parameter is set, for example, then a mobile device would display 10 records by default in the UI but fetch 30 records (and only 10 records would be visible in the UI at any one time).

**Reviewing Notification Messages in Siebel Mobile**

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

You review notification messages in Siebel Mobile by tapping the exclamation icon, which is shown in [Figure 4-1](#), on the application banner. Note the following:

- The counter beside the exclamation icon indicates the number of messages that are waiting for you to read.
- When there are zero messages, the exclamation icon is dark-gray with a light-gray zero.
- If there is one or more message waiting to be read, then the exclamation icon shows the color of the highest priority unread message.
- If there is one or more message waiting to be read that has an Urgent with Alert severity, then the exclamation icon blinks. The exclamation icon stops blinking after the message is read.
- The exclamation icon does not blink if there are messages waiting to be read with only a Normal, High, or Urgent severity.

**To review notification messages in Siebel Mobile**

1. Tap the exclamation icon on the application banner.

The Notification Summary list opens. Note the following:

- The messages that you have not read appear at the top of the list.
- The messages that you have already read appear in the Previously Read section. A grayed-out message means that you have already read the message.
- The vertical line next to a message, which is color coded, indicates the severity level of message, as shown in the following table.

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

2. Tap a message to open and review the details of the message. All notification messages are read-only.
  - a. Tap any attachment that is part of a message to open and view the attachment.
  - b. Tap any hyperlink that is part of a message to navigate to the associated view.
  - c. Tap the message again to close it after you have read it.
 

After you read a new message, the following happens:

    - The message moves to the Previously Read section on the Notification Summary list.
    - The counter beside the exclamation icon on the application banner decreases accordingly.
  - d. Tap Delete (the X icon) to delete a message after you read it.
 

After you delete a message, the message disappears from the Notification Summary list.
3. Tap Mark as Read (the check icon at the top of the Notification Summary list) to clear all unread messages and mark them as read.

## Modifying Notification Messages

Administrators can modify the code internally for notification messages on either the client or server-side using the following APIs:

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

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

The following procedure shows you how to create new and modify existing notification messages in Siebel CRM by navigating to the Administration Communication screen, then the Message Broadcast view.

### To modify notification messages in Siebel CRM

1. Log in to the Siebel business application as administrator.
2. Navigate to the Administration Communication screen, then the Message Broadcast view.
3. In the Message field, edit the existing message or type the text to create a new message.
4. Use the Recipient Position and Recipient Division fields respectively to select the positions and divisions associated with the users to whom to send the notification message.

For more information about modifying notification messages in Siebel CRM, see the topics about creating and modifying a message broadcast in *Siebel Applications Administration Guide*.

After you update an existing or create a new notification message in Siebel CRM, the updated or new message is sent directly to mobile application screens and the counter beside the exclamation icon on the application banner increases to indicate that a new message has arrived. If the new message waiting to be read has an Urgent with Alert severity, then the exclamation icon also blinks on the application banner.

### Related Topic

["Configuring Notification Settings for Siebel Mobile"](#) on page 4-15

## Configuring Application Settings for Siebel Mobile

You can configure the application settings for Siebel Mobile using the photo icon, which is shown in [Figure 4-1](#), on the application banner. When you tap the photo icon on the application banner, the following information appears:

- The logged in user's photo, provided one is uploaded to the user's profile on Siebel Server. Otherwise, a default generic photo appears. For more information, see ["Uploading a User Profile Image to Siebel Server"](#) on page 4-14.
- The logged in user's name and email address.
- The following options: Settings and Logout.
  - **Settings.** This option has the following suboptions: Behavior and Notifications.
    - Behavior.** See ["Configuring Application Behavior Settings for Siebel Mobile"](#) on page 4-14.
    - Notifications.** See ["Configuring Notification Settings for Siebel Mobile"](#) on page 4-15.

- **Log Out.** See "[Logging Out of Siebel Mobile](#)" on page 4-28.

## Uploading a User Profile Image to Siebel Server

The following procedure shows you how to upload a user profile image to Siebel Server. This uploaded user profile image will appear instead of the default generic photo for Settings in Siebel Mobile connected applications.

### To upload a user profile image to Siebel Server

1. Log in to the Siebel business application.
2. Navigate to the Administration - User screen, then the Persons view.
3. Select the record whose user profile image you want to personalize.
4. Go to the Image field on the form that appears and do one of the following as required:
  - Type the full relative path to an image on a local server, for example, as follows:  
`c:/images/photo.png`
  - Type the full URL address to an image stored externally, for example, as follows:  
`http://<xyz.server.com>/-7rbVFtLM9yE/AAAAAAAAAAAI/AAAAAAAAAAAA/ICL18P-yc8I/s96-c/photo.jpg`
5. Save the changes when finished.

When the user next logs in to the application, Settings on the application banner shows the logged in user's profile image that is uploaded to the Siebel Server, and not the default generic photo.

## Configuring Application Behavior Settings for Siebel Mobile

You use the Behavior option under Settings to configure the application behavior for Siebel Mobile including the startup view, navigation control, UI theme, and view transition.

- **Startup View.** The default startup view for Siebel Mobile varies according to the mobile application that you are using, but you can change the startup view as required.
- **Navigation Control.** The default navigation control for Siebel Mobile connected applications is Side Menu (hamburger navigation control), but you can change this to Tab or Tree as required, provided that the control is configured for your mobile application.
- **Theme.** The default UI theme that is used by Siebel Mobile connected applications is Mobile Theme, but you can change this to a custom theme as required, provided that a custom theme is configured for your mobile application.
- **Transition.** The default view transition that is set for Siebel Mobile connected applications is None, but you can change this to a custom view transition as required, provided that a custom view transition is configured for your mobile application.

For more information about navigation control configuration, creating a new mobile theme, and creating a custom view transition for Siebel Mobile, see *Configuring Siebel Open UI*.

### To configure the application behavior settings for Siebel Mobile

1. Tap the photo icon on the application banner, and then select the Settings option.
2. Tap Behavior, and then complete the fields shown in the following table as required.

Field	Description
Startup View	The name of the view to display when the mobile application starts. Tap Startup View, and select a view from the drop-down list.
Navigation Control	Specifies the navigation control to use in the mobile application. Tap Navigation Control, and select one of the following options as required: <ul style="list-style-type: none"> <li>▪ <b>Side Menu.</b> Indicates to use the hamburger navigation control (the default navigation control) in the mobile application where all Siebel objects appear in a <i>menu</i> drop-down list in the UI.</li> <li>▪ <b>Tab.</b> Indicates to use the tab navigation control in the mobile application where all Siebel objects appear in format in the UI.</li> <li>▪ <b>Tree.</b> Indicates to use the tree navigation control in the mobile application where all Siebel Objects appear in format in the UI.</li> </ul>
Theme	The UI theme to use throughout the mobile application. Tap Theme, and select a theme from the drop-down list.
Transition	The view transition mode to use when moving from one view or applet to another view or applet in the mobile application. Tap Transition, and select a view transition from the drop-down list. The options are: None, Slide In, Slide Left, Flip, and Fade.
Confirm Before Deleting Record	Specifies whether or not to prompt users for confirmation before deleting a record, as follows: <ul style="list-style-type: none"> <li>▪ <b>On</b> indicates to prompt users for confirmation.</li> <li>▪ <b>Off</b> indicates not to prompt users for confirmation before deleting a record.</li> </ul> <p>Tap the Confirm Before Deleting Record option so that a check icon or On appears. Tap the option again so that X or Off appears.</p>

3. Save the changes when finished.

## Configuring Notification Settings for Siebel Mobile

You use the Notifications option under Settings to configure the settings for notification messages in your Siebel Mobile connected application.

### To configure notification settings for Siebel Mobile

1. Tap the photo icon on the application banner, and then select the Settings option.
2. Tap Notifications, and then complete the fields shown in the following table as required.

Field	Description	Example Value
Update Interval (Seconds)	Type the time interval in seconds at which you want notifications to refresh.	120
Prefix of Normal Priority Message	Type the text to appear before a normal-priority message. This aids accessibility. For example, a letter is useful if you have difficulty distinguishing the colors of the messages.	N

Field	Description	Example Value
Prefix of High Priority Message	Type the text to appear before a high-priority message. This aids accessibility. For example, a letter is useful if you have difficulty distinguishing the colors of the messages.	H
Prefix of Urgent Priority Message	Type the text to appear before an urgent-priority message. This aids accessibility. For example, a letter is useful if you have difficulty distinguishing the colors of the messages.	U

3. Save the changes when finished.

## Displaying Location Details in Siebel Mobile

Global Positioning System (GPS) is integrated with Siebel Mobile so that when you tap the pin icon shown in [Figure 4-2](#), a map window opens showing the location details. Mapping is configured by default for some list and form applets in Siebel Mobile, but you can set up mapping for any other Siebel Mobile applet as required by configuring the pin icon (or map functionality) in Siebel Tools for the applet in question. For more information, see the topics about maps in *Configuring Siebel Open UI*.

**Figure 4-2 Siebel Mobile: Pin Icon**



The pin icon is available in the right pane or work area of Siebel Mobile, provided that the map functionality is enabled for the mobile application. If you cannot see the pin icon or if you can see it but it is disabled, then the map functionality is not enabled for the mobile application.

Information about the following is included in this topic:

- ["Enabling the Map Functionality for Siebel Mobile"](#) on page 4-16
- ["Displaying Route Details Using the Pin Icon"](#) on page 4-17

## Enabling the Map Functionality for Siebel Mobile

The map functionality is disabled by default in Siebel Mobile. Before you can use the map functionality in Siebel Mobile, you must enable it first. This involves enabling location services and disabling block pop-ups on your mobile device.

### To enable the map functionality for Siebel Mobile

1. Enable location services on your mobile device (iPad) as follows:
  - a. Start your iPad.
  - b. Go to Settings, Privacy, Location Services, and then turn on Location Services.  
If location services are disabled on your mobile device, then you will not be able to use the map functionality in Siebel Mobile.
2. Disable block pop-ups on your mobile device (iPad) as follows:
  - a. Start your iPad.
  - b. Go to Settings, Safari, and then turn off Block Pop-ups.

## Displaying Route Details Using the Pin Icon

The following procedure shows you how to use the pin icon to display the route details for a call or an account. The procedure is the same when using the pin icon in other views. This procedure assumes that the map functionality is enabled for Siebel Mobile as shown in ["Enabling the Map Functionality for Siebel Mobile"](#) on page 4-16.

### To display route details using the pin icon

1. Navigate to and open a call or an account in your mobile application.  
All details for the selected call or account appear in the work area.
2. Tap the pin icon in the work area.
3. If prompted, select Allow to enable Siebel Mobile to use the location of your mobile device.

A map window opens with pins pointing to the location of the selected call or account, and showing the route from starting address (current mobile device location) to the destination call or account address.

If a route is not found for a given address, then an error message appears in the map window.

## Running Predefined Queries in Siebel Mobile

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

### To run a predefined query in Siebel Mobile

1. Tap the Side Menu icon on the application banner and then select an object from the drop-down list.
2. Tap the PDQ drop-down list (shown in [Figure 4-1](#)) on the application banner to display the list of saved predefined queries for the object.  
Scroll up and down the predefined query list that opens to find the query that you want to run.
3. Tap a predefined query in the list.  
This step runs the predefined query, returning the appropriate data in the list view.
4. Tap PDQ on the application banner again to close the predefined query.

## Scanning Barcodes in Siebel Mobile

Barcode scanning is supported by default for activity parts in the Siebel Mobile application for Siebel Service. To use the barcode feature in a different application view, then you must set up the barcode interface for the view in question. To use the barcode feature in a different mobile application (for example, the Siebel Mobile application for Siebel Pharma), then you must set up the barcode interface for a view in the required mobile application. For more information about setting up the barcode interface, which is an administrator task, see the chapter about barcodes in *Siebel Field Service Guide*.

- The barcode interface in the Siebel Mobile application for Siebel Service allows you to scan barcodes for parts using a barcode reader. For more information, see ["Modifying Activity Parts by Scanning Barcode Data"](#) on page 8-9.
- You can also search for records by scanning barcode data in the Siebel Mobile application for Siebel Service. For more information, see ["Searching for Records by Scanning Barcode Data"](#) on page 4-18.

## Searching for Records by Scanning Barcode Data

You can use a barcode reader to search for records in the Siebel Mobile application for Siebel Service by scanning barcode data. For example, the following procedure shows you how to search for a service request by scanning the service request number. For more information about the barcode functionality in Siebel Mobile, see "[Scanning Barcodes in Siebel Mobile](#)" on page 4-17.

### To search for records by scanning barcode data

1. Tap the magnifying glass icon on the application banner.
2. In the drop-down list of the search control, select Service Request.
3. Scan the barcode (in this example, the service request number).

The view that contains the record with the service request data appears, and the record with the service request number appears in that view.

4. To close the search control, select the magnifying glass icon on the application banner again.

## Using Attachments in Siebel Mobile

Attachments are supported by default in the Siebel Mobile application for Siebel Pharma version 8.1.1.10 or later. To use attachments in a different mobile application (for example, in the Siebel Mobile application for Siebel Consumer Goods, Siebel Sales, Siebel Service, or Siebel Finance version 8.1.1.10 or later), then you must use the following Siebel Pharma application views as templates and configure them accordingly for the required mobile application:

- Pharma Account Attachments View - Mobile
- Pharma Contact Attachments View - Mobile

The attachment feature in Siebel Mobile allows you to keep supporting material for account and contact records by permitting you to associate an attachment with individual account and contact records. For more information about using attachments in the Siebel Mobile application for Siebel Pharma, see the following topics:

- "[Modifying Attachment Information for an Account](#)" on page 5-18
- "[Modifying Attachment Information for a Contact](#)" on page 5-27
- "[Managing Attachment Downloads Using the Siebel App](#)" on page 4-26

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**Note :** The attachment functionality is supported in both online (connected) and offline (disconnected) mode. In disconnected mode, attachments are supported when customers download the Siebel app or use the Siebel Mobile Archive MAA file to create and deploy a customized Siebel Mobile Application Container for iOS and Android devices. For more information, see "[Downloading and Installing the Siebel Mobile Application Container \(Siebel App\)](#)" on page 4-21 and "[Managing Attachment Downloads Using the Siebel App](#)" on page 4-26.

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## Starting an External Application from Siebel Mobile

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

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

### To start an external application from within a mobile application

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

## Printing from Siebel Mobile

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

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

### To print from Siebel Mobile

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

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

- Add Bookmark
  - Add to Reading List
  - Add to Home Screen
  - Mail Link to this Page
  - Tweet
  - Print
2. Tap Print, Select Printer, and then the name of your wireless printer.
  3. Tap plus or minus to indicate the number of copies that you want to print.
  4. Tap Print to start printing.

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

## Integrating Siebel Mobile with Native Device Features

This topic describes how to integrate Siebel Mobile with native device features. It includes the following information:

- ["Overview of Siebel Mobile Integration with Native Device Features"](#) on page 4-20
- ["Downloading and Installing the Siebel Mobile Application Container \(Siebel App\)"](#) on page 4-21
- ["Using the Siebel Mobile Archive MAA File \(Administrator Task\)"](#) on page 4-22
- ["Setting Up the Host Server for Siebel Mobile"](#) on page 4-22
- ["Customizing the Application Icons in the Siebel App"](#) on page 4-23
- ["Configuring the Siebel App on iOS and Android Devices"](#) on page 4-24
- ["Clearing the Application Cache for Applications Using the Siebel App"](#) on page 4-25
- ["Resetting the Host Server Using the Siebel App"](#) on page 4-26
- ["Managing Attachment Downloads Using the Siebel App"](#) on page 4-26
- ["Configuring the Privacy Settings for Native Device Feature"](#) on page 4-27

### Overview of Siebel Mobile Integration with Native Device Features

You can access and use the following native device features from Siebel Mobile, provided that you download and configure the Siebel Mobile Application Container (Siebel app) first from either the Apple App store if using an iOS device or from Google Play if using an Android device:

- **File System Access.** From Siebel Mobile, you can access the native device local hard disk space to read data from and write data to files stored locally on the device using either relative or absolute paths, or the file URL (`file://host/path`). Depending on mobile application set up and on whether you are using Siebel Mobile connected or disconnected, Siebel Mobile routes commands to the Siebel Server (if online) or local resources (if offline) as required.
- **Location Services.** From Siebel Mobile, you can use the native device location services to obtain more accurate location data. For more information about using location services on a mobile device, see ["Displaying Location Details in Siebel Mobile"](#) on page 4-16 and ["Configuring the Privacy Settings for Native Device Feature"](#) on page 4-27.

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**Note :** This release of Siebel Mobile uses WkWebView for iOS devices (instead of UIWebView), which improves performance and communication between the application and web page.

This release of Siebel Mobile uses SQLite (and not WebSQL):

- SQLite implements the SQL database system and its query language is a simplified version of SQL.
  - SQLite is an embedded SQL database engine and it reads and writes to ordinary disk files.
  - Whereas WebSQL implementations have a 50 megabyte data download limit, this limitation does not apply to SQLite.
-

## Downloading and Installing the Siebel Mobile Application Container (Siebel App)

This topic shows you how to download and install the Siebel Mobile Application Container (Siebel app) on your mobile device. You need the Siebel app to dynamically link to a Siebel Mobile server so that you will be able to access and use the following native device features from Siebel Mobile:

- Local file system
- Location services

### Downloading and Installing the Siebel App from the Apple App Store

The following procedure shows you how to download and install the Siebel app (Siebel.ipa file) from the Apple App Store for iOS devices such as iPad. If you want to create and deploy your own customized Siebel app, then ignore this procedure and see "[Using the Siebel Mobile Archive MAA File \(Administrator Task\)](#)" on page 4-22 for more information.

#### To download and install the Siebel app from the Apple App Store

1. Start your iOS mobile device.
2. Go to the Apple App Store (<http://store.apple.com/us>) and search for the following app: Siebel.
3. Tap FREE to download the Siebel app.
4. Tap INSTALL to install the Siebel app.
5. Enter your Apple ID password to install the Siebel app on your mobile device.
6. Configure the Siebel app.

For more information, see "[Configuring the Siebel App on iOS and Android Devices](#)" on page 4-24.

### Downloading and Installing the Siebel App From Google Play

The following procedure shows you how to download and install the Siebel app (Siebel.apk file) from Google Play for Android devices such as Samsung Galaxy tablet. If you want to create and deploy your own customized Siebel app, then ignore this procedure and see "[Using the Siebel Mobile Archive MAA File \(Administrator Task\)](#)" on page 4-22 for more information.

#### To download and install the Siebel app from Google Play

1. Start your Android device.
2. Go to Google Play (<http://play.google.com/store>) and search for the following app:  
Siebel
3. Select the Siebel app and then tap INSTALL.
4. Follow the on screen instructions to install the Siebel app on your mobile device.
5. Configure the Siebel app.

For more information, see "[Configuring the Siebel App on iOS and Android Devices](#)" on page 4-24.

## Using the Siebel Mobile Archive MAA File (Administrator Task)

Instead of downloading the Siebel Mobile Application Container (Siebel app) and installing it on a mobile device as described in "Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 4-21, administrators can download the Siebel Mobile archive file (Siebel.maa) from Oracle Software Delivery Cloud (<https://edelivery.oracle.com>) and use the archive file to create and deploy a customized Siebel app for iOS and Android devices.

For more information about how to use Oracle JDeveloper to create a new Mobile Application Framework (MAF) application from an archive (.maa) file, how to deploy the mobile application, and customize the application (for example, replace the application images), see the supporting documentation for Oracle JDeveloper:

[http://docs.oracle.com/cd/E53569\\_01/tutorials/tut\\_jdev\\_maf\\_setup/tut\\_jdev\\_maf\\_setup.html](http://docs.oracle.com/cd/E53569_01/tutorials/tut_jdev_maf_setup/tut_jdev_maf_setup.html)

## Setting Up the Host Server for Siebel Mobile

The following procedure shows you how to set up the host server where Siebel Mobile connected applications are located. This is a required task if using Siebel Mobile version 2.0 or later.

### To set up the host server for Siebel Mobile

1. After installing and configuring Siebel Web Server Extension (SWSE), copy the mobileapplist.lst file from SWSEHome to the host Web server root path.

For example on Microsoft Windows (IIS), navigate to Local Disk (C), inetput, wwwroot and paste a copy of the mobapplist.lst file in this location. On UNIX, copy the .lst file to the Web server root and make sure it supports the .lst MIME type.

The following table summarizes the Web server paths for different operating systems.

Field	Web Server Path
Windows	C:\inetpub\wwwroot\
Linux	<Build Installed directory>/web/Oracle_WT1/instances/instance1/config/OHS/ohs1/htdocs
Solaris	<Build Installed directory>/ web/ https-localhost/docs
HP-UX	<Build Installed directory>/ web / htdocs
AIX	<Build Installed directory>/ web / htdocs

2. Open the mobileapplist.lst file in a text editor.

An example of the content in the file is as follows:

```
{
  "1":{"id":"1","name":"Siebel ePharma Mobile","lang":"LanguageCode","url":"http(s)://
webserver_hostname/epharmam_LanguageCode/"},
  "2":{"id":"2","name":"Siebel Service for Mobile","lang":"LanguageCode","url":"http(s)://
webserver_hostname/servicem_LanguageCode/"},
  "3":{"id":"3","name":"Siebel Sales Mobile","lang":"LanguageCode","url":"http(s)://
webserver_hostname/salesm_LanguageCode/"},
}
```

3. Edit the `mobileapplist.lst` file as follows:
  - a. Change `LanguageCode` to the language in which you want to run the application. For example, change `LanguageCode` to `enu` to run the application in English.
  - b. Depending on your deployment, use `http` or `https` for the Siebel Web server URL.
  - c. Change `epharmam_LanguageCode` and `servicem_LanguageCode` to (for example) `epharmam_enu` and `servicem_enu` respectively.

When finished, the content in the `mobileapplist.lst` file appears similar to the following:

```
{
  "1":{"id":"1","name":"Siebel ePharma Mobile","lang":"enu","url":"http(s)://
www.websserver.com/epharmam_enu/"},
  "2":{"id":"2","name":"Siebel Service for Mobile","lang":"enu","url":"http(s)://
www.websserver.com/servicem_enu/"},
  "3":{"id":"3","name":"Siebel Sales Mobile","lang":"enu","url":"http(s)://
www.websserver.com/salesm_enu/"},
}
```

- d. Save and close the `mobileapplist.lst` file.
4. Change the MIME type for `mobileapplist.lst` as follows:
    - a. Open Internet Information Services Manager.
    - b. Navigate to the Features view and double-click MIME Types.
    - c. Right-click the `.lst` MIME type and select Edit.
    - d. In the MIME Type field, type in `text/plain`, and then click OK.

## Customizing the Application Icons in the Siebel App

You can customize the icon associated with each application listed on the Home page (Application List screen) of the Siebel app.

### To customize the application icons in the Siebel App

1. Open the `mobileapplist.lst` file in a text editor.

An example of the content in the file is as follows:

```
{
  "1":{"id":"1","name":"Siebel ePharma Mobile","lang":"LanguageCode","url":"http(s)://
websserver_hostname/epharmam_LanguageCode/"},
  "2":{"id":"2","name":"Siebel Service for Mobile","lang":"LanguageCode","url":"http(s)://
websserver_hostname/servicem_LanguageCode/"},
  "3":{"id":"3","name":"Siebel Sales Mobile","lang":"LanguageCode","url":"http(s)://
websserver_hostname/salesm_LanguageCode/"},
}
```

2. For each application definition in the `mobileapplist.lst` file, add the following:

```
"icon": "appname.png"
```

Where *appname* is the name of the application. When finished, the content in the `mobileapplist.lst` file appears similar to the following:

```
{
  "1":{"id":"1","name":"Siebel ePharma Mobile","lang":"LanguageCode","icon":"epharma.png",
"url":"http(s):// www.websserver.com/epharmam_LanguageCode/"},
```

```

"2":{"id":"2","name":"Siebel Service for Mobile","lang":"LanguageCode","icon":"service.png",
"url":"http(s):// www.websserver.com/service_m_LanguageCode/"}
"3":{"id":"3","name":"Siebel Sales Mobile","lang":"LanguageCode","icon":"sales.png",
"url":"http(s):// www.websserver.com/sales_m_LanguageCode/"}
}

```

3. Save and close the mobileapplist.lst file.

## Configuring the Siebel App on iOS and Android Devices

This procedure shows you how to configure the Siebel app on iOS and Android devices, which involves the following:

- Dynamically connecting to a Siebel Server by entering the Siebel Mobile host server address.

You must set up the host server as shown in ["Setting Up the Host Server for Siebel Mobile"](#) on page 4-22. After the host server is set up, you can connect to multiple applications in a single Siebel app.

- Clearing the application cache for an application.

This procedure assumes that you have already downloaded and installed the Siebel app from either the Apple App Store for iOS devices or from Google Play for Android devices as shown in ["Downloading and Installing the Siebel Mobile Application Container \(Siebel App\)"](#) on page 4-21.

### To configure the Siebel app

1. If not already done so, set up the Host Server where Siebel Mobile connected applications are located as shown in ["Setting Up the Host Server for Siebel Mobile"](#) on page 4-22.
2. Start your iOS or Android device and then tap Siebel to start the Siebel app.
3. In the Host section, type in the host server address where Siebel Mobile connected applications are located, for example, as follows:

```
http://hostserveraddress.com
```

You will be connected directly to this host server whenever you log in to an application located at this host server address.

4. If this is your first time starting the Siebel app on your mobile device, then accept the end-user license agreement.
5. Tap the right arrow next to the host server address to go to the Home page (Application List screen) of the Siebel app.

The Application List screen lists the applications that you can connect to on the host server address. You can connect to multiple applications using the Siebel app.

The Application List is populated from the mobileapplist file that you must configure as shown in ["Setting Up the Host Server for Siebel Mobile"](#) on page 4-22.

Each application in the Application List has a unique icon. You can customize the icon associated with each application as shown in ["Customizing the Application Icons in the Siebel App"](#) on page 4-23.

There is an Edit button and right arrow next to each application in the Application List. Use the Edit button to log in to the application and clear the application

cache. Use the right arrow to return to the application (having navigated back to the Home page).

6. Connect to an application as follows:
  - a. Tap the Edit button next to the application that you want to connect to.
  - b. Type in the Username and Password credentials for the application, and then tap Sign In.
 

After successful login, the application starts and is rendered as normal in the Siebel app. The following icons appear on the top, right side of the screen (under the application banner) and persist for all views in the application:

    - **Refresh icon** for refreshing the page in the browser.
    - **Attachment icon** for going to the Attachment Download Manager view. For more information, see ["Managing Attachment Downloads Using the Siebel App"](#) on page 4-26.
    - **Home icon** for returning to the Home page (Application List screen, described in the previous step) of the Siebel app.
7. To clear the application cache for an application, see ["Clearing the Application Cache for Applications Using the Siebel App"](#) on page 4-25.
8. The Identifier does not apply to Siebel Mobile connected applications.

## Clearing the Application Cache for Applications Using the Siebel App

Application cache files improve the way applications work on your mobile device by encouraging pages to load faster. Too much cache information, however, can cause application performance in general to slow down. To prevent a deterioration in application performance, it is recommended that you check the browser cache size and clear the application cache data accordingly from time to time.

The following procedure shows you how to clear the application cache for an application by using the Siebel app on iOS or Android devices. Clearing the application cache involves doing one or both of the following:

- Deleting the attachment files downloaded to a device.
- Removing all mobile application cookies, application cache, and web database data from a device.

### To clear the application cache for an application using the Siebel app

1. Start your iOS or Android device and then tap Siebel to start the Siebel app.
2. Tap the right arrow next to the host server address to go to the Home page (Application List screen) of the Siebel app.
3. Log in to the application where you want to clear the cache.
 

For more information about using the Siebel app to log in to an application, see ["Configuring the Siebel App on iOS and Android Devices"](#) on page 4-24.
4. Tap the Edit button next to the application where you want to clear the cache, and then do the following:
  - Tap Clear Downloaded Attachments and tap OK when prompted for confirmation to delete all downloaded files for the selected application.
  - Tap Clear Downloaded Data and tap OK when prompted for confirmation to delete all cookies and data for the selected application.

The application cache will be cleared when the application is restarted.

#### Related Topics

["Disabling Private Browsing"](#) on page 3-16

["Clearing the Browser Cache"](#) on page 3-17

["Checking the Browser Cache Size"](#) on page 3-18

["Configuring the Privacy Settings for Native Device Feature"](#) on page 4-27

## Resetting the Host Server Using the Siebel App

The following procedure shows you how to reset the Siebel Server or host server for an application using the Siebel app on iOS or Android devices. When you reset the host server, all applications configured on the host server are reset.

#### To reset the Siebel Server or host server using the Siebel app

1. Start your iOS or Android device and then tap Siebel to start the Siebel app.
2. Tap Reset All, and then tap Yes when prompted with the following message:

*Application Data will be reset. This will take effect when the application is restarted.*

The next time you start the Siebel app, the connection field or host server address field will be empty.

For more information about connecting to the host server, see ["Configuring the Siebel App on iOS and Android Devices"](#) on page 4-24.

## Managing Attachment Downloads Using the Siebel App

If you are using the Siebel app with Siebel Mobile version 2.0 or later, then you can manage the download of attachments using the Attachment Download Manager view.

The Attachment Download Manager view lists all the attachments that have either finished downloading or are scheduled to download and includes the following information for each attachment record:

- **Check box.** If checked, this indicates that the attachment record is selected. If unchecked, the attachment record is not selected.
- **List Order.** A number in the List Order field indicates the rank or sequence number for the attachment record. You can drag and drop each row to change the record sequence or key in a number manually in the List Order field.
- **Entity.** The attachment type.
- **File Name.** The name of the attachment record.
- **Size (KB).** The size of the attachment file.
- **Progress.** The attachment download status, which can be one of the following: Not Downloaded, Queued for Download, Downloaded, File not Available, Downloading.  
  
Downloading indicates that the attachment is actively downloading and a progress bar shows the progress of the download.
- **Speed.** The attachment download speed.
- **Time Left.** The duration of time to complete the attachment download.



The following procedure shows you how to manage the download of attachments using the Attachment Download Manager view in the Siebel app. The Attachment Download Manager view is available in online (connected) mode after the initial full download is complete, and in offline (disconnected) mode where attachments are downloaded during the synchronization process.

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**Note :** The attachment functionality is supported in both online (connected) and offline (disconnected) mode. In disconnected mode, attachments are supported when customers download the Siebel app or use the Siebel Mobile Archive MAA file to create and deploy a customized Siebel app for iOS and Android devices. For more information, see ["Using Attachments in Siebel Mobile"](#) on page 4-18 and ["Downloading and Installing the Siebel Mobile Application Container \(Siebel App\)"](#) on page 4-21.

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### To manage attachment downloads using the Siebel app

1. Start your iOS or Android device and then tap Siebel to start the Siebel app.
2. Log in to the application where you want to manage attachment download.

After successful login, the application starts and is rendered as normal in the Siebel app. The following icons appear on the top, right side of the screen (under the application banner) and persist for all views in the application: Refresh, Attachment, and Home. For more information about these icons and about using the Siebel app to log in to an application, see ["Configuring the Siebel App on iOS and Android Devices"](#) on page 4-24.

3. Tap the Attachment icon on the top, right side of the screen to open the Attachment Download Manager view.
4. If required, reorder the attachment list by typing in a number in the List Order field.
5. Select one or more attachment records for download by tapping the check box next to each record.
6. Configure the following Download Settings as required:
  - **Download Only on Wi-Fi.** Tap this check box to indicate to download attachments only on Wi-Fi.
7. Choose one of the following download options as required:
  - **Download.** Tap Download to queue the selected attachment records for download.
  - **Remove.** Tap Remove to delete attachments belonging to the selected attachment records from the mobile device, and cancel any future downloads of or updates to the selected attachment records.

## Configuring the Privacy Settings for Native Device Feature

To use native device features such as location services with your Siebel Mobile connected application, then you must configure the privacy setting for the feature on your mobile device accordingly as shown in the following procedures.

### **Configuring the Privacy Settings on iOS Devices**

The following procedure shows you how to configure the privacy settings on iOS devices.

#### **To configure the privacy settings on iOS devices**

1. Start your iOS device.
2. Tap Settings, tap Privacy and then tap Location Services to turn on the setting.
3. The map functionality is now enabled for Siebel Mobile. For more information about using the map functionality, see "[Displaying Location Details in Siebel Mobile](#)" on page 4-16.

### **Configuring the Privacy Settings on Android Devices**

The following procedure shows you how to configure the privacy settings on Android devices.

#### **To configure the privacy settings on Android devices**

1. Start your mobile device.
2. Tap Google Settings, tap Location and then tap Location Reporting to turn on the setting.
3. The map functionality is now enabled for Siebel Mobile. For more information about using the map functionality, see "[Displaying Location Details in Siebel Mobile](#)" on page 4-16.

## **Logging Out of Siebel Mobile**

This topic describes how to log out of Siebel Mobile.

#### **To log out of Siebel Mobile**

- Tap Settings (the photo icon) on the application banner, and then tap Logout.

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## Using the Siebel Mobile Connected Application for Siebel Pharma

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

- [Using the Home Page for Siebel Pharma](#)
- [Managing Calls for Siebel Pharma](#)
- [Managing Accounts for Siebel Pharma](#)
- [Managing Contacts for Siebel Pharma](#)
- [Managing Messaging Plans](#)
- [Using the PCD Viewer in Siebel Mobile](#)
- [Task Flows for Siebel Pharma](#)

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**Note:** The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is not configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see "[Inline Editing](#)" on page 4-7.

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### Using the Home Page for Siebel Pharma

The following procedures related to using the Siebel Mobile application for Siebel Pharma home page are included in this topic:

- ["Viewing Call Planning Information"](#) on page 5-2
- ["Scheduling Calls For Contacts and Accounts"](#) on page 5-2

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

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## Viewing Call Planning Information

On the home page, you can view the call planning information for contacts and accounts in the calendar.

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**Note:** Viewing calls in the calendar is similar to viewing activities in the calendar. For more information about using the calendar to view activities, see *Siebel Fundamentals for Siebel Open UI*.

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### To view the call planning information

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane. Tap Contacts or Accounts to expand the corresponding contacts or accounts list.
2. On the calendar in the right pane, view the call planning information as follows:
  - Tap the left and right arrows to navigate across dates and view the calls scheduled on different dates.
  - Tap Today to see the calls scheduled for today's date.
  - Tap the daily, weekly, or monthly calendar icon to switch between the daily, weekly, or monthly view of calls scheduled.
  - Tap 2 to switch the daily display to two hourly intervals.
  - Tap 4 to switch the daily display to four hourly intervals.  
The default daily display interval is one hour.
3. On the calendar in the right pane, you can perform the following tasks:
  - Extend the duration of a call by tapping the border of the call and dragging it out.
  - Move a call by tapping the call, and then dragging and dropping it on a different time or date.
  - Schedule a call for a contact or an account. For more information, see "[Scheduling Calls For Contacts and Accounts](#)" on page 5-2.
  - Tap a call on the calendar to drilldown and open the call details. For more information, see "[Displaying Call Details](#)" on page 5-4.

## Scheduling Calls For Contacts and Accounts

On the home page, you can schedule calls for contacts and accounts in the calendar.

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**Note:** Scheduling calls in the calendar is similar to scheduling activities in the calendar. For more information about using the calendar to schedule activities, see *Siebel Fundamentals for Siebel Open UI*.

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### To schedule calls for contacts and accounts

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane. Tap Contacts or Accounts to expand the corresponding contacts or accounts list.
2. Schedule a new contact call as follows:
  - a. Tap Contacts in the left pane to expand the contacts list, and then select a contact from the list.
  - b. Drag and drop the selected contact onto the calendar in the right pane to schedule the new call.
  - c. Drilldown on the new call to open it.
  - d. Modify the call details as required. For more information, see ["Modifying Call Information"](#) on page 5-5.
  - e. Modify the related items for the call as required. For more information, see Step 3 in ["Displaying Call Details"](#) on page 5-4.
3. Schedule a new account call as follows:
  - a. Tap Accounts in the left pane to expand the accounts list, and then select a contact from the list.
  - b. Drag and drop the selected account onto the calendar in the right pane to schedule the new call.
  - c. Drilldown on the new call to open it.
  - d. Modify the call details as required. For more information, see ["Modifying Call Information"](#) on page 5-5.
  - e. Modify the related items for the call as required. For more information, see Step 3 in ["Displaying Call Details"](#) on page 5-4.

## Customizing the Call Planning Calendar

You can customize the call planning calendar for Siebel applications by navigating to the User Preferences screen, then the Calendar view in Siebel CRM. When you customize the call planning calendar in Siebel CRM, you customize the call planning calendar for both your Siebel desktop and Siebel Mobile application. Some calendar features that you can customize include the following:

- Working day start and end time
- Appointment duration
- Day to start the working week
- Default calendar format (daily, weekly, monthly)
- Weekly calendar view (5 or 7 day weekly view)

For more information about customizing the call planning calendar in Siebel CRM, see *Siebel Life Sciences Guide* and *Siebel Fundamentals for Siebel Open UI*.

## Managing Calls for Siebel Pharma

A *call* is a scheduled interaction that you have with a contact or an account.

The following procedures related to calls and call management are included in this topic:

- ["Displaying Call Details"](#) on page 5-4
- ["Modifying Call Information"](#) on page 5-5
- ["Modifying Attendee Information for a Call"](#) on page 5-6
- ["Modifying Promotional Items for a Call"](#) on page 5-7
- ["Modifying Samples for a Call"](#) on page 5-8
- ["Modifying Product Details for a Call"](#) on page 5-9
- ["Viewing the Validation Results for a Call"](#) on page 5-10
- ["Adding Literature Information to a Call"](#) on page 5-10
- ["Viewing Presentation Detail Information for a Call"](#) on page 5-11
- ["Capturing the Electronic Signature for a Call"](#) on page 5-12
- ["Submitting a Call for Processing"](#) on page 5-12

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

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### Displaying Call Details

You can display call details by using the calendar.

#### To display call details

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.
3. To view the related items for the selected call, tap the following names in the list in the left pane:
  - **Call Planning.** Shows the home page for Siebel Pharma where you can view the call planning information for and schedule new calls for contacts and accounts. For more information, see the following:
    - ["Viewing Call Planning Information"](#) on page 5-2
    - ["Scheduling Calls For Contacts and Accounts"](#) on page 5-2
  - **Attendees.** Shows the attendee information for the call. For more information, see ["Modifying Attendee Information for a Call"](#) on page 5-6.

- **Promotional Items Dropped.** Shows the number of dropped promotional items for the call. For more information, see ["Modifying Promotional Items for a Call"](#) on page 5-7.
  - **Samples Dropped.** Shows the number of dropped samples for the call. For more information, see ["Modifying Samples for a Call"](#) on page 5-8.
  - **Product Details.** Shows the product details for the call. For more information, see ["Modifying Product Details for a Call"](#) on page 5-9.
  - **Validation Results.** Shows the validation results for the call. For more information, see ["Viewing the Validation Results for a Call"](#) on page 5-10.
  - **Literature.** Shows the literature information for the call. For more information, see ["Adding Literature Information to a Call"](#) on page 5-10.
  - **Presentation Detail.** Shows the presentation detail information for the call. For more information, see ["Viewing Presentation Detail Information for a Call"](#) on page 5-11.
4. To show a presentation for the selected call, tap the Detail button in the work area. For more information, see ["Showing Presentations in Siebel Mobile"](#) on page 5-30.

## Modifying Call Information

Complete the following procedure to modify call information.

### To modify call information

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Update an existing call as follows:
  - a. Tap a call on the Calendar in the right pane to open it and display the following:
    - The details for the selected call in the right pane or work area.
    - A list in the left pane in which you can select the related items for the call.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it. The following table describes the fields that you can modify.

Field Name	Description
Contact	Select a contact for the call. You must select either a contact in this field or an account in the Account field. You cannot select both a contact and an account for the call.
Account	Select an account for the call. You must select either an account in this field or a contact in the Contact field. You cannot select both an account and a contact for the call.
Address	Displays the primary address for the contact or account that you select. To select a different address, tap the Address field, and select the address from the list that appears.
Start Date	Select the call start date and time.

Field Name	Description
Call Duration	Select the number of minutes for the call duration.

- To schedule a new call, see "[Scheduling Calls For Contacts and Accounts](#)" on page 5-2.

## Modifying Attendee Information for a Call

Complete the following procedure to modify the attendee information for a call. An *attendee* is an individual who is present during a meeting or phone discussion for an account call. Attendee information applies to account calls, and not to contact calls. However, when you add an attendee to an account call, you create a contact call for the attendee.

### To modify the attendee information for a call

- Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
- Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.
- Update an existing call attendee as follows:
  - Tap Attendees in the list in the left pane.
 

All the attendees associated with the call appear in the work area, and all details for the selected call appear above the Attendees list in the work area.
  - Tap the attendee that you want to update.
  - Tap the record field that you want to update, and update the field value.
 

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
- Add an attendee to the call as follows:
  - Tap Attendees in the list in the left pane, and then tap the plus (+) icon in the work area.
  - Choose one or more attendees on the list that appears, and then tap OK.
 

You can perform one of the following steps to filter the records in the list:

    - Tap All Contacts to show all of the contacts that are available.
    - Tap Affiliated Contacts to show only the affiliated contacts associated with the account for the call.
- Add promotional items and samples to the call and capture a signature for the call as follows:
  - Tap Attendees in the list in the left pane, and then drilldown on the attendee Name.



- b. Add promotional items and samples to the call as required. For more information, see the following topics:
  - ["Modifying Promotional Items for a Call"](#) on page 5-7
  - ["Modifying Samples for a Call"](#) on page 5-8
- c. Capture a signature for the call as required. For more information, see ["Capturing the Electronic Signature for a Call"](#) on page 5-12.

## Modifying Promotional Items for a Call

Complete the following procedure to modify the promotional items for a call. You give promotional items to the customer during the call. Given promotional items are dropped promotional items. Promotional items apply to contact or attendee calls, and not to account calls.

Before you submit a call for processing, you can modify the promotional item information for the call. You can give only products that meet the following criteria to the customer as promotional items:

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

### To modify the promotional items for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.
3. Update an existing call promotional item as follows:
  - a. Tap Promotional Items Dropped in the list in the left pane.
 

All the promotional items associated with the call appear in the work area, and all details for the selected call appear above the Promotional Items Dropped list in the work area.
  - b. Tap the promotional item that you want to update.
  - c. Tap the record field that you want to update, and update the field value.
 

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add a promotional item to the call as follows:
  - a. Tap Promotional Items Dropped in the list in the left pane, and then tap Add in the work area.
  - b. Enter the quantity of the promotional item to give to the call customer in the Quantity field, and then tap OK.
 

The following table describes the other fields.

Field Name	Description
Name	Displays the name of the promotional item.
Quantity	Type the quantity of the promotional item to give to the call customer.
Max Qty	Displays the maximum quantity of the promotional item that the sales representative can give to the call customer in the allocation period.
Available Qty	Displays the quantity of the promotional item that is currently available to the sales representative.

## Modifying Samples for a Call

Complete the following procedure to modify the samples for a call. You give samples to the customer during the call. Given samples are dropped samples. Samples apply to contact or attendee calls, and not to account calls.

Before you submit a call for processing, you can modify the sample information for the call. You can give only products that meet the following criteria to the customer as samples:

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

### To modify the samples for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.
3. Update an existing call sample as follows:
  - a. Tap Samples Dropped in the list in the left pane.
 

All the samples associated with the call appear in the work area, and all details for the selected call appear above the Samples Dropped list in the work area.
  - b. Tap the sample that you want to update.
  - c. Tap the record field that you want to update, and update the field value.
 

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add a sample to the call as follows:
  - a. Tap Samples Dropped in the list in the left pane, and then tap Add in the work area.
  - b. Enter the quantity of the sample to give to the call customer in the Quantity field, and then tap OK.

The following table describes the other fields.

Field Name	Description
Name	Displays the sample name.
Lot Number	Displays the lot number for the sample.
Expiry Date	Displays the date that the sample expires.
Quantity	Type the quantity of the sample to give to the call customer.

## Modifying Product Details for a Call

Complete the following procedure to modify the product details for a call. Product details indicate the priority of each product associated with the call. You determine these priorities when you interact with the customer. After you add product details, a list of products in ascending order of priority appears when you tap Products Detailed for the call.

Before you submit a call for processing, you can modify the product details for the call. Only products with indications are available to associate with calls. An *indication* is the purpose or therapeutic area that a product drug addresses. The administrator associates product drugs with indications.

### To modify the product details for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.
3. Update an existing call product detail as follows:
  - a. Tap Products Detailed in the list in the left pane.
 

All the detail products associated with the call appear in the work area, and all details for the selected call appear above the Products Detailed list in the work area.
  - b. Tap the product detail that you want to update.
  - c. Tap the record field that you want to update, and update the field value.
 

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add a new product detail to the call as follows:
  - a. Tap Products Detailed in the list in the left pane, and then tap Add in the work area.
  - b. Choose a product from the list on the form that appears, enter a number to indicate the importance of the product in the Priority field, and then tap OK.
 

Specify product priority in sequential order. The following table describes the fields.

Field Name	Description
Name	Displays the product name.
Priority	Type a number to indicate the importance of each product.
Indication	Displays the purpose or therapeutic area that the product drug addresses. Values for an indication include the following: Allergy, Asthma, Arrhythmia, Heart Failure, Syncope, and Other.

## Viewing the Validation Results for a Call

After you capture the electronic signature for a call or submit the call for processing, validation results are automatically generated for the call. Check these validation results to determine any errors in the call data. For example, the validation results might show a warning message indicating that you entered a quantity that exceeds the maximum quantity of samples that you can give to the customer for the call. You must resolve any errors in the validation results before proceeding with a call. If there are warning errors for a call, you can sign or submit the call for processing. But if there are any unresolved validation errors for a call, then you will be unable to sign or submit the call for processing.

### To view the validation results for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.
3. Tap Validation Results in the list in the left pane.

All the validation results and any errors in the call data appear in the work area, and all details for the selected call appear above the Validation Results list in the work area.

## Adding Literature Information to a Call

Complete the following procedure to add literature information to a call. Literature information includes sales and marketing literature, such as product brochures, white papers, and data sheets. The following file types are supported: GIF, JPEG, JPG, MP4, PDF, PNG, HTML, and ZIP.

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**Note:** For more information about literature in Siebel CRM, see the chapter about literature administration in *Siebel Applications Administration Guide*.

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### To add literature information to a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.

- The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
    - The details for the selected call in the right pane or work area.
    - A list in the left pane in which you can select the related items for the call.
  3. Add literature to the call as follows:
    - a. Tap Literature in the list in the left pane.  
All the literature associated with the call appears in the work area, and all details for the selected call appear above the Literature list in the work area.
    - b. Tap the plus (+) icon in the work area, choose the literature item on the list that appears, and then tap OK.

## Viewing Presentation Detail Information for a Call

Complete the following procedure to view the presentation detail information for a call. The following file types are supported: GIF, JPEG, JPG, MP4, PDF, PNG, HTML, and ZIP.

### To view the presentation detail information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.
3. Tap Presentation Detail in the list in the left pane.

All the presentation items (messaging plans, messaging plan items, and related items) associated with the call appear in the work area, and all details for the selected call appear above the Presentation Details list in the work area.

The following table describes the presentation detail information.

Field Name	Description
Message	The name of the presentation item (messaging plan, messaging plan item, or related messaging plan item) that was shown during the call.
Response	The response rating recorded for the presentation item (messaging plan, messaging plan item, or related messaging plan item).
Duration	The duration in seconds that the presentation item (messaging plan, messaging plan item, or related messaging plan item) was shown during the call.
Sequence	Tracks the message plan items that are detailed and submitted for the call.

### Related Topics:

["Using the PCD Viewer in Siebel Mobile"](#) on page 5-29

["Recording Responses to Presentations in Siebel Mobile"](#) on page 5-32

## Capturing the Electronic Signature for a Call

After you enter all of the necessary information for a call, including information about dropped samples, you capture the signature of the contact for the call. You capture this signature to verify the contact's receipt of samples. After you obtain this signature, you cannot update the dropped samples associated with it.

### To capture the electronic signature for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.
3. Tap Sign in the work area.

Information about the contact for the call and about the dropped samples for the call appears.

4. Capture the signature of the contact in the signature input box.
5. If you make a mistake when capturing the signature, do one of the following as required:
  - Tap Clear to clear the signature and start again.
  - Tap Cancel to exit the call signing process.
6. Save the record.

You can now submit the call for processing.

## Submitting a Call for Processing

After you complete all of the information for the call, and after you capture the signature for the disbursed samples, you submit the call for processing. You can submit only calls that have a Status field of Planned or Signed. At least one disbursed sample must be associated with a call before you can submit it.

You submit a call for processing to close the call. After you submit a call, you can review but not update the call. The inventory of the sales representative is decreased by the disbursed samples and disbursed promotional items for the call.

### To submit a call for processing

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Contacts and Accounts list in the left pane.
2. Tap a call on the calendar in the right pane to open it and display the following:
  - The details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for the call.

3. Tap Submit to submit the call for processing.

The Status field for the call changes to Submitted. You cannot resubmit a call with a Status field value of Submitted. The call is now closed and locked.

## Managing Accounts for Siebel Pharma

An *account* is a company or individual with whom your company conducts business. It represents the relationship between your company and that company or individual. You can use the Account Details screen as the primary navigation tool for your customer interactions.

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

- ["Displaying Account Details"](#) on page 5-13
- ["Modifying Account Information"](#) on page 5-14
- ["Modifying Contact Information for an Account"](#) on page 5-14
- ["Modifying Call Information for an Account"](#) on page 5-15
- ["Modifying Address Information for an Account"](#) on page 5-16
- ["Modifying Contact Affiliation Information for an Account"](#) on page 5-17
- ["Modifying Account Relationship Information for an Account"](#) on page 5-18
- ["Modifying Attachment Information for an Account"](#) on page 5-18

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

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### Displaying Account Details

You can display account details by using the Accounts list.

#### To display account details

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. To view the related items for the selected account, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the account. For more information, see ["Modifying Contact Information for an Account"](#) on page 5-14.
  - **Calls.** Shows the call information for the account. For more information, see ["Modifying Call Information for an Account"](#) on page 5-15.

- **Addresses.** Shows the address information for the account. For more information, see ["Modifying Address Information for an Account"](#) on page 5-16.
  - **Contact Affiliations.** Shows the contact affiliation information for the account. For more information, see ["Modifying Contact Affiliation Information for an Account"](#) on page 5-17.
  - **Account Relationships.** Shows the account relationship information for the account. For more information, see ["Modifying Account Relationship Information for an Account"](#) on page 5-18.
  - **Attachments.** Shows the attachments for the account. For more information, see ["Modifying Attachment Information for an Account"](#) on page 5-18.
4. To show a presentation for the selected account, tap the Detail button in the work area. For more information, see ["Showing Presentations in Siebel Mobile"](#) on page 5-30.

## Modifying Account Information

Complete the following procedure to modify account information.

### To modify account information

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Update an existing account as follows:
  - a. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new account as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new account in the fields that appear, and then save the record.

## Modifying Contact Information for an Account

Complete the following procedure to modify the contact information for an account.

### To modify the contact information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.



2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account contact as follows:
  - a. Tap Contacts in the list in the left pane.  
All the contacts associated with the account appear in the work area, and all details for the selected account appear above the Contacts list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the account as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap OK.
5. Create a new account contact as follows:
  - a. Tap Contacts in the list in the left pane, tap the plus (+) icon in the work area, and then tap the plus (+) icon on the list that appears.
  - b. Enter the information for the new contact in the fields that appear, and then save the record.

## Modifying Call Information for an Account

Complete the following procedure to modify the call information for an account. You can update only calls that are not yet submitted for processing.

### To modify the call information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account call as follows:
  - a. Tap Calls in the list in the left pane.  
All the calls associated with the account appear in the work area, and all details for the selected account appear above the Calls list in the work area.
  - b. Tap the call that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account call as follows:

- a. Tap Calls in the list in the left pane, and then tap the plus (+) icon in the work area.
- b. Enter the information for the new call in the fields that appear, and then save the record.

The following table describes the fields.

Field Name	Description
Account	Displays the account associated with the call.
Address	Displays the primary address for the account. To select a different address, tap the Address field, and select the address from the list that appears.
Type	Select the type of call.
Start Date	Select the start date and time of the call.
Call Duration	Select the number of minutes for the call duration.
Comment	Type any necessary comment about the call.

## Modifying Address Information for an Account

Complete the following procedure to modify the address information for an account.

### To modify the address information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account address as follows:
  - a. Tap Addresses in the list in the left pane.  
All the addresses associated with the account appear in the work area, and all details for the selected account appear above the Addresses list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing address to the account as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the address on the list that appears, and then tap OK.
5. Create a new account address as follows:
  - a. Tap Addresses in the list in the left pane, tap the plus (+) icon in the work area, and then tap the plus (+) icon on the list that appears.

- b. Enter the information for the new address in the fields that appear, and then save the record.

## Modifying Contact Affiliation Information for an Account

Complete the following procedure to modify the contact affiliation information for an account. You can also affiliate accounts with a contact. For more information, see ["Modifying Account Affiliation Information for a Contact"](#) on page 5-25.

### To modify the contact affiliation information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing contact affiliation as follows:
  - a. Tap Affiliations in the list in the left pane.  
All the affiliations associated with the account appear in the work area, and all details for the selected account appear above the Affiliations list in the work area.
  - b. Tap the affiliation that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new contact affiliation as follows:
  - a. Tap Affiliations in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new affiliation in the fields that appear, and then save the record.

The following table describes the fields. Note that when you create a new or delete an existing contact affiliation, that contact appears on or is removed from the list of contacts associated with the account.

Field Name	Description
Last Name	Select the contact.
First Name	Displays the first name of the contact that you select.
Start Date	Select the start date that the contact is affiliated with the account.
Primary Specialty	Type the primary speciality for the contact.
Email	Displays the email address of the contact that you select.
Direct	Select this check box to route the profile data for the contact to all members of the account team. Clear this check box to route the profile data for the contact only to members of the account team who are assigned to the contact.

## Modifying Account Relationship Information for an Account

Complete the following procedures to modify the account relationship information for an account. This information denotes the relationship between the account and another account.

### To modify the account relationship information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account relationship as follows:
  - a. Tap Relationships in the list in the left pane.  
All the relationships associated with the account appear in the work area, and all details for the selected account appear above the Relationships list in the work area.
  - b. Tap the relationship that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account relationship as follows:
  - a. Tap Relationships in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new relationship in the fields that appear, and save the record.  
The following table describes the fields.

Field Name	Description
This Account	Displays this account.
Other Account	Select an account to associate with this account.
Relationship	Select the relationship that the other account has with this account.
Site	Displays the site for the other account that you select.

## Modifying Attachment Information for an Account

The attachment feature in the Siebel Mobile application for Siebel Pharma allows you to associate an attachment with individual account records. The following procedure shows you how to modify the attachment information for an account, including how to attach files (such as, Microsoft Outlook email messages, Microsoft Word documents, image files, and videos) and URL addresses to account records using the New File and New URL links respectively. Note the following:

- With iOS devices (such as iPad), you can only attach files from the gallery or by using the camera on the mobile device to take a photo or record a video.

- With non-iOS devices (such as Samsung Galaxy tablets), you can choose to attach files using applications such as Bluetooth file transfer or the file browser, provided that Siebel Mobile has been integrated with the file system on the mobile device. If the mobile application is not integrated with the file system on your mobile device, then you will not be able to upload and download attachment files.

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**Note :** The attachment functionality is supported in both online (connected) and offline (disconnected) mode. In disconnected mode, attachments are supported when customers download the Siebel app or use the Siebel Mobile Archive MAA file to create and deploy a customized Siebel Mobile Application Container for iOS and Android devices. For more information, see the following topics: "[Using Attachments in Siebel Mobile](#)" on page 4-18, "[Downloading and Installing the Siebel Mobile Application Container \(Siebel App\)](#)" on page 4-21, and "[Managing Attachment Downloads Using the Siebel App](#)" on page 4-26.

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### To modify the attachment information (file or URL) for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing attachment (file or URL) as follows:
  - a. Tap Attachment in the list in the left pane.  
All the attachments associated with the account appear in the work area, and all details for the selected account appear above the Attachments list in the work area.
  - b. Tap the attachment that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. If using an iOS device (such as iPad), then attach files and open attachment files as follows:
  - a. To attach an existing file from the gallery:
    - Tap Attachment in the list in the left pane, and then tap New File in the work area.
    - Tap Choose Existing, select an existing file to attach to the record, and then tap OK.
  - b. To attach a new photo or video:
    - Tap Attachment in the list in the left pane, and then tap New File in the work area.
    - Tap Take Photo or Video, take an instant photo or record an instant video and then tap OK to attach the photo or video to the record.

- c. To open an attachment file in a new window, tap the attachment name link.
5. If using a non-iOS device (such as Samsung Galaxy tablet), then attach files and open attachment files as follows:
  - a. To upload a new attachment file to Siebel Server from a mobile device:
    - Tap Attachment in the list in the left pane, and then tap New File in the work area.
    - Browse to and select the file that you want to upload, and then tap OK.
  - b. To download an attachment file from Siebel Server to a mobile device:
    - Tap Attachment in the list in the left pane, and then tap the down arrow next to the attachment name in the work area.
    - Tap Download. The attachment is saved to the Downloads folder on the mobile device.
  - c. To open an attachment file, tap the down arrow next to the attachment name and then tap Open.

The attachment opens in a new window.
6. Attach a new URL address as follows:
  - a. Tap Attachment in the list in the left pane, and then tap New URL in the work area.
  - b. Type the URL address in the URL field, and then tap Add.
  - c. To navigate to an existing URL address, tap the URL attachment name link.

## Managing Contacts for Siebel Pharma

A *contact* is an individual with whom your company conducts business or expects to conduct business in the future. It can be an employee of another company, an independent consultant, a vendor, or an acquaintance.

The following procedures related to contacts and contact management are included in this topic:

- ["Displaying Contact Details"](#) on page 5-21
- ["Modifying Contact Information"](#) on page 5-21
- ["Modifying Call Information for a Contact"](#) on page 5-22
- ["Modifying Address Information for a Contact"](#) on page 5-23
- ["Modifying Best Time Information for a Contact"](#) on page 5-23
- ["Modifying State License Information for a Contact"](#) on page 5-24
- ["Modifying Account Affiliation Information for a Contact"](#) on page 5-25
- ["Modifying Contact Relationship Information for a Contact"](#) on page 5-26
- ["Modifying Attachment Information for a Contact"](#) on page 5-27

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

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## Displaying Contact Details

You can display contact details by using the Contacts list.

### To display contact details

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
3. To view the related items for the selected contact, tap the following names in the list in the left pane:
  - **Calls.** Shows the calls for the contact. For more information, see "[Modifying Call Information for a Contact](#)" on page 5-22.
  - **Addresses.** Shows the address information for the contact. For more information, see "[Modifying Address Information for a Contact](#)" on page 5-23.
  - **Best Times.** Shows the best-time-to-call information for the contact. For more information, see "[Modifying Best Time Information for a Contact](#)" on page 5-23.
  - **State Licenses.** Shows the state license information for the contact. For more information, see "[Modifying State License Information for a Contact](#)" on page 5-24.
  - **Account Affiliations.** Shows the account affiliation information for the contact. For more information, see "[Modifying Account Affiliation Information for a Contact](#)" on page 5-25.
  - **Contact Relationships.** Shows the contact relationship information for the contact. For more information, see "[Modifying Contact Relationship Information for a Contact](#)" on page 5-26.
  - **Attachments.** Shows the attachments for the account. For more information, see "[Modifying Attachment Information for a Contact](#)" on page 5-27.
4. To show a presentation for the selected contact, tap the Detail button in the work area. For more information, see "[Showing Presentations in Siebel Mobile](#)" on page 5-30.

## Modifying Contact Information

Complete the following procedure to modify contact information.

### To modify contact information

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Update an existing contact as follows:

- a. Tap a contact in the Contacts list.  
All details for the selected contact appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new contact as follows:
- a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new contact in the fields that appear, and then save the record.

## Modifying Call Information for a Contact

Complete the following procedure to modify the call information for a contact. You can update only calls that are not yet submitted for processing.

### To modify the call information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.  
All details for the selected contact appear below the list in the work area.
3. Update an existing contact call as follows:
  - a. Tap Calls in the list in the left pane.  
All the calls associated with the contact appear in the work area, and all details for the selected contact appear above the Calls list in the work area.
  - b. Tap the call that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new contact call as follows:
  - a. Tap Calls in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new call in the fields that appear, and then save the record.

The following table describes the fields.

Field Name	Description
Name	Displays the contact associated with the call.
Address	Displays the primary address for the contact. To select a different address, tap the Address field, and select the address from the list that appears.
Type	Select the type of call.



Field Name	Description
Start Date	Select the start date and time of the call.
Call Duration	Select the number of minutes for the call duration.
Comment	Type any necessary comment about the call.

## Modifying Address Information for a Contact

Complete the following procedure to modify the address information for a contact.

### To modify the address information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected call in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.  
All details for the selected contact appear below the list in the work area.
3. Update an existing contact address as follows:
  - a. Tap Addresses in the list in the left pane.  
All the addresses associated with the contact appear in the work area, and all details for the selected contact appear above the Addresses list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing address to the contact as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the address on the list that appears, and then tap OK.
5. Create a new contact address as follows:
  - a. Tap Addresses in the list in the left pane, tap the plus (+) icon in the work area, and then tap the plus (+) icon on the list that appears.
  - b. Enter the information for the new address in the fields that appear, and then save the record.

## Modifying Best Time Information for a Contact

Complete the following procedure to modify the best-time-to-call information for a contact. This information typically applies to a contact who is a physician or another health-care provider. It is associated with an address for the contact.

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

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### To modify the best time information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
3. Update an existing contact best-time as follows:
  - a. Tap Best Times in the list in the left pane.

All the best times associated with the contact appear in the work area, and all details for the selected contact appear above the Best Times list in the work area.
  - b. Tap the best time that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new contact best-time as follows:
  - a. Tap Best Times in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new best time in the fields that appear, and then save the record.

## Modifying State License Information for a Contact

Complete the following procedure to modify the state license information for a contact. This information typically applies to a contact who is a physician or another health-care provider.

### To modify the state license information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.

3. Update an existing contact state license as follows:
  - a. Tap State Licenses in the list in the left pane.  
All the state licenses associated with the contact appear in the work area, and all details for the selected contact appear above the Licenses list in the work area.
  - b. Tap the state license that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new contact state license as follows:
  - a. Tap State Licences in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new state license in the fields that appear, and then save the record.  
The following table describes the fields.

Field Name	Description
State	Select the state or jurisdiction in the United States associated with the license number. If the jurisdiction is not in the United States, then this field is not required.
License Number	Type the license number.
Status	Select the status of the license, which can be Active or Inactive.
Expiry Date	Select the date when the license expires.

## Modifying Account Affiliation Information for a Contact

Complete the following procedure to modify the account affiliation information for a contact. You can set up such an affiliation for call-reporting purposes. You can also affiliate contacts with an account. For more information, see ["Modifying Contact Affiliation Information for an Account"](#) on page 5-17.

### To modify the account affiliation information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.  
All details for the selected contact appear below the list in the work area.
3. Update an existing account affiliation as follows:
  - a. Tap Affiliations in the list in the left pane.  
All the affiliations associated with the contact appear in the work area, and all details for the selected contact appear above the Affiliations list in the work area.
  - b. Tap the affiliation that you want to update.

- c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
- 4. Create a new account affiliation as follows:
  - a. Tap Affiliations in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new affiliation in the fields that appear, and then save the record.  
The following table describes the fields.

Field Name	Description
Account	Select the account.
Account Type	Displays
Site	Displays the site for the account that you select.
Start Date	Select the start date that the account is affiliated with the contact.
End Date	Select the end date that the account is affiliated with the contact.
Comments	Type any necessary comments for the affiliated account.

## Modifying Contact Relationship Information for a Contact

Complete the following procedure to modify the contact relationship information for a contact. This information denotes the relationship or role that exists between the contact and another contact.

### To modify the contact relationship information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.  
All details for the selected contact appear below the list in the work area.
3. Update an existing contact relationship as follows:
  - a. Tap Relationships in the list in the left pane.  
All the relationships associated with the contact appear in the work area, and all details for the selected contact appear above the Relationships list in the work area.
  - b. Tap the relationship that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add a contact relationship as follows:
  - a. Tap Relationships in the list in the left pane, and then tap the plus (+) icon in the work area.

- b. Choose the contact on the list that appears, and then tap OK.
- c. Tap the Relationship Type field, update the field value, and then save the record when finished.

## Modifying Attachment Information for a Contact

The attachment feature in the Siebel Mobile application for Siebel Pharma allows you to associate an attachment with individual contact records. The following procedure shows you how to modify the attachment information for a contact, including how to attach files (such as, Microsoft Outlook email messages, Microsoft Word documents, image files, and videos) and URL addresses to contact records using the New File and New URL links respectively. Note the following:

- With iOS devices (such as iPad), you can only attach files from the gallery or by using the camera on the mobile device to take a photo or record a video.
- With non-iOS devices (such as Samsung Galaxy tablets), you can choose to attach files using applications such as Bluetooth file transfer or the file browser, provided that Siebel Mobile has been integrated with the file system on the mobile device. If the mobile application is not integrated with the file system on your mobile device, then you will not be able to upload and download attachment files.

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**Note :** The attachment functionality is supported in both online (connected) and offline (disconnected) mode. In disconnected mode, attachments are supported when customers download the Siebel app or use the Siebel Mobile Archive MAA file to create and deploy a customized Siebel Mobile Application Container (Siebel app) for iOS and Android devices. For more information, see "[Using Attachments in Siebel Mobile](#)" on page 4-18, "[Downloading and Installing the Siebel Mobile Application Container \(Siebel App\)](#)" on page 4-21, and "[Managing Attachment Downloads Using the Siebel App](#)" on page 4-26.

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### To modify the attachment information (file or URL) for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.  
All details for the selected contact appear below the list in the work area.
3. Update an existing attachment (file or URL) as follows:
  - a. Tap Attachment in the list in the left pane.  
All the attachments associated with the contact appear in the work area, and all details for the selected contact appear above the Attachments list in the work area.
  - b. Tap the attachment that you want to update in the work area.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

For example, you can change the attachment name and add comments. Note that if you edit the attachment name inline, then your changes are saved when you step off the record in the mobile application.

4. If using an iOS device (iPad), then attach files and open attachment files as follows:
  - a. To attach an existing file from the gallery:
    - Tap Attachment in the list in the left pane, and then tap New File in the work area.
    - Tap Choose Existing, select an existing file to attach to the record, and then tap OK.
  - b. To attach a new photo or video:
    - Tap Attachment in the list in the left pane, and then tap New File in the work area.
    - Tap Take Photo or Video, take an instant photo or record an instant video and then tap OK to attach the photo or video to the record.
  - c. To open an attachment file, tap the attachment name link.

The attachment opens in a new window.
5. If using a non-iOS device (Samsung Galaxy tablet), then attach files and open attachment files as follows:
  - a. To upload a new attachment file to Siebel Server from a mobile device:
    - Tap Attachment in the list in the left pane, and then tap New File in the work area.
    - Browse to and select the file that you want to upload, and then tap OK.
  - b. To download an attachment file from Siebel Server to a mobile device:
    - Tap Attachment in the list in the left pane, and then tap the down arrow next to the attachment name.
    - Tap Download. The attachment is saved to the Downloads folder on the mobile device.
  - c. To open an attachment file, tap the down arrow next to the attachment name and then tap Open.

The attachment opens in a new window.
6. Attach a new URL address as follows:
  - a. Tap Attachment in the list in the left pane, and then tap New URL in the work area.
  - b. Type the URL address in the URL field, and then tap Add.
  - c. To navigate to an existing URL address, tap the URL attachment name link.

**Related Topic:**

["Integrating Siebel Mobile with Native Device Features"](#) on page 4-20

## Managing Messaging Plans

A *messaging plan* is a presentation that consists of a specific sequence of content. A messaging plan can be made up of a number of presentation or messaging plan items (slides), which in turn can have a number of related messages (also slides).

The following procedures are related to messaging plans and presentation management:

- ["Displaying Messaging Plan Details"](#) on page 5-29
- ["Using the PCD Viewer in Siebel Mobile"](#) on page 5-29

## Displaying Messaging Plan Details

You can display messaging plan (presentation) details by using the Messaging Plans list.

### To display messaging details

1. Tap the Side Menu icon on the application banner, and then tap Messaging Plans.  
The Messaging Plan list appears in the work area.
2. Tap a messaging plan in the Messaging Plan list.  
All details for the selected messaging plan appear below the list in the work area.
3. Tap the Detail button in the work area.

The messaging plan preview page that opens contains the following information:

- A list of all accessible messaging plans (presentations), which are released and unexpired, appears at the top of the page.
  - The messaging plan items (presentation items or slides) in thumbnail format associated with the selected messaging plan appear next.
  - Tap the green Related label below a messaging plan item to show the related messages for that item (if there are any).
  - For more information about the Launch, Generate, and Related buttons on the messaging plan preview page, see ["Showing Presentations in Siebel Mobile"](#) on page 5-30.
  - Tap Exit to return to the Messaging Plan list page.
4. Drill down on the messaging plan link name in the Name field.

All the presentation items followed by the related messages associated with the selected messaging plan appear in the work area below the messaging plan details.

## Using the PCD Viewer in Siebel Mobile

The Personalized Content Delivery Viewer is available in Siebel Pharma and by default for Calls, Accounts, Contacts, and Messaging Plans in the Siebel Mobile application for Siebel Pharma. In the Siebel Mobile application for Siebel Pharma, you must start the viewer by selecting the Detail button. However, you can use the PCD Viewer on any other applet in the mobile application provided that you configure the Detail button for the applet. For more information about configuring the Detail button for applets in general in Siebel Mobile, see the topic about configuring interactive detailing in *Configuring Siebel Open UI*.

You use the PCD Viewer in Siebel Mobile and Siebel CRM to deliver personalized content to customers, to present information about products to customers, and to obtain feedback from customers about product presentations and personalized content delivered.

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**Note:** For Siebel Mobile, the PCD Viewer is supported only if using the Siebel Mobile Archive MAA file to create and deploy a customized Siebel app for iOS or Android devices. The Detail button will be enabled and available in the Siebel Mobile Application Container (Siebel app) only. The Detail button will be unavailable and disabled in the browser. For more information about the Siebel Mobile Application Container, see "[Downloading and Installing the Siebel Mobile Application Container \(Siebel App\)](#)" on page 4-21.

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Before using the PCD Viewer in Siebel Mobile, do the following:

- Plan for presentation delivery by reviewing the available messaging plans and any existing call presentation information.

For more information, see "[Managing Messaging Plans](#)" on page 5-29 and "[Viewing Presentation Detail Information for a Call](#)" on page 5-11.

- Create appropriate literature records in Siebel CRM.
- Associate literature with messaging plans in Siebel CRM.
- Define access to, release, and revise messaging plans in Siebel CRM.

For more information about how to perform each of these tasks in Siebel CRM, see the chapter about Using Personalized Content Delivery in *Siebel Life Sciences Guide*.

- Configure the server location where you want to store messaging plan contents (presentation items, related messages, and HTML ZIP files).

For more information, see "[Setting the Server Uncompression Location](#)" on page 5-33.

To deliver a presentation in Siebel Mobile using the PCD Viewer, see the following:

- "[Showing Presentations in Siebel Mobile](#)" on page 5-30
- "[Recording Responses to Presentations in Siebel Mobile](#)" on page 5-32

## Showing Presentations in Siebel Mobile

You use the Detail button in the Siebel Mobile application for Siebel Pharma to present interactive, promotional content to customers. The Detail button is available for Calls, Accounts, Contacts, and Messaging Plans. The following procedure shows you how to deliver personalized content and presentations to customers.

### To show presentations in Siebel Mobile

1. Navigate to one of the following views:
  - **Call Details view.** Tap the Side Menu icon on the application banner, tap Calls, and then drill down on a call in the calendar in the right pane. For more information, see "[Displaying Call Details](#)" on page 5-4.
  - **Account Details view.** Tap the Side Menu icon on the application banner, tap Accounts, and then select an account in the Accounts list in the right pane. For more information, see "[Displaying Account Details](#)" on page 5-13.



- **Contact Details view.** Tap the Side Menu icon on the application banner, tap Contacts, and then select a contact in the Contacts list in the right pane. For more information, see "[Displaying Contact Details](#)" on page 5-21.
  - **Messaging Plans view.** Tap the Side Menu icon on the application banner, tap Messaging Plans, and then select a messaging plan in the Messaging Plans list in the work area. For more information, see "[Displaying Messaging Plan Details](#)" on page 5-29.
2. Tap the Detail button in the work area.

The messaging plan preview page that opens contains the following information:

- A list of all accessible messaging plans (presentations), which are released and unexpired, appears at the top of the page.
- The messaging plan items (presentation items or slides) associated with the selected messaging plan appear next in thumbnail format.

Tap the green Related label below a messaging plan item to show the related messages for that item (if there are any).

If you can see the list of accessible messaging plans but only blank thumbnails, then tap Generate to uncompress the messaging plan. After the messaging plan has been successfully uncompressed, you can view and access all messaging plan items (in thumbnail format) and related messages.

For the Generate link to work properly and uncompress the messaging plan to a suitable server location, the Server Uncompression Location system preference must be set first. For more information, see "[Setting the Server Uncompression Location](#)" on page 5-33.

3. Tap the messaging plan that you want to show, and then tap Launch to start the presentation.

The messaging plan opens in the PCD Viewer.

If Enable Direct Launch is set for messaging plans in Siebel CRM, then you can also tap any messaging plan item followed by Launch to start the presentation. In this case, the messaging plan item opens in full-screen mode in the PCD Viewer. To see any preceding items in the presentation, navigate back to them as needed.

4. Navigate the presentation as follows:
- a. Use the Next and Previous arrows to scroll through the presentation.
  - b. Tap anywhere at the bottom of the screen to activate a footer navigation bar showing the messaging plan items in thumbnail image format. Then do the following as required:
    - Tap any thumbnail image to open and show the selected messaging plan item in full-screen mode.
    - Use the Next and Previous arrows to scroll through the thumbnail images.
  - c. Tap anywhere at the top of the screen to activate the header navigation bar. The following options are available on the header navigation bar:
    - **Done.** Tap when finished showing the presentation to go to the Feedback page. For more information, see "[Recording Responses to Presentations in Siebel Mobile](#)" on page 5-32.
    - **Exit.** Tap to cancel the presentation session and exit the PCD Viewer.
    - **Full.** Tap to show the presentation in full screen mode.

- **Contacts.** Tap to show the contacts that are attending the presentation, tap Add to add more contacts if additional contacts join the presentation, and then tap Player to return to and continue with the presentation session in the PCD Viewer.

A contact call is created after you suspend response logging or submit the responses logged for any contact that joins the presentation during the presentation session. At least one contact is necessary to submit the presentation feedback. For more information, see "[Recording Responses to Presentations in Siebel Mobile](#)" on page 5-32.

- **Related.** Tap to go to and preview a slide's related messaging plan items. Tap Player in the header navigation bar to return to the main slide.

## Recording Responses to Presentations in Siebel Mobile

You use the Detail button in the Siebel Mobile application for Siebel Pharma to present interactive, promotional content or presentations to customers and then to capture the customer responses to that presentation content. When you have finished showing a presentation by tapping Done in the header navigation bar, the Feedback page opens showing a summary of the presented material in thumbnail format and the time (in seconds) spent on each slide. On the Feedback page, you can capture the customer responses to the presentation content using the star rating control.

### To record responses to presentations during a call

1. Tap Done when you have finished showing the presentation.

The Feedback page opens showing the list of contacts who attended the presentation session. For each selected contact, a summary of the content that was presented including the time (in seconds) spent on each presentation item appears below the Contact list in thumbnail format. For more information about showing presentations, see "[Showing Presentations in Siebel Mobile](#)" on page 5-30.

2. Capture the customer rating for each presentation item as follows:
  - a. Tap the appropriate number of stars below each presentation item as required.

The significance of each star rating is as follows:

- One star indicates Rejected.
- Two stars indicates Not Interested.
- Three stars indicates Need Data.
- Four stars indicates Continue Discussion.
- Five stars indicates Accepted.
- No stars indicates No Feedback.

The last option (no stars indicating no feedback) is allowed only if the Disable Response check box is selected (False) for the messaging plan in Siebel CRM, making the logging of customer feedback to presentations optional.

If the Disable Response check box is not selected (True) for the messaging plan in Siebel CRM, then response ratings must be logged for all presentation items before you will be allowed to submit the presentation feedback. For more information about creating messaging plans in Siebel CRM, see *Siebel Life Sciences Guide*.

If the following message appears, then you cannot proceed until you provide a rating for each presentation item: *Rating is a must.*

The feedback rating that is captured for each presentation item applies for all account and contact call attendees. If required, capture the individual ratings for each attendee on a contact call as shown in the following step.

- b. For contact calls, capture the individual ratings for each attendee on the call as follows:
  - Tap a contact in the Contact list.
  - For each presentation item, tap or swipe the flip switch to either Yes or No.
 

Yes indicates that you want to record an individual rating for the contact on the presentation item. No indicates that you do not want to record an individual rating for the contact on the presentation item because the contact joined the presentation session after the presentation started and was not present when the presentation item was shown.
  - Tap the appropriate number of stars below each presentation item where the flip switch is set to Yes. The significance of each star is shown in Step 2a.

For account calls, you cannot capture the individual ratings for attendees.

- c. If required tap Suspend to save all response ratings logged so far and exit the PCD Viewer.

A contact call is created after you suspend the response logging for any contact that joined the presentation during the presentation session. At a later time, you can return to the respective contact call that was created when you selected Suspend to finish providing feedback or modify the existing feedback as required.

- d. Tap Submit when you have recorded all feedback.

The response ratings are logged under the Presentation Details related item for the call. For more information, see "[Viewing Presentation Detail Information for a Call](#)" on page 5-11.

A record for the product associated with the messaging plan is also created under Products Detailed for the call. For more information, see "[Modifying Product Details for a Call](#)" on page 5-9.

After you submit the presentation feedback, all feedback-related account and contact call records are editable until the respective call is submitted. For attendee calls, however, all feedback-related records are locked after you submit the presentation feedback. At least one contact is necessary to submit the presentation feedback.

## Setting the Server Uncompression Location

The following procedure shows you how to set the Server Uncompression Location system preference in Siebel CRM. You must set this system preference so that when you select the Generate link in Siebel Mobile, the messaging plan contents will be uncompressed to the location specified by the Server Uncompression Location system preference.

### To set the server uncompression location

1. Log in to the Siebel business application.

2. Navigate to the Administration - Application screen, then the System Preference view.
3. Query for the Server Uncompression Location system preference.
4. Enter the server location path where you want uncompression to happen as shown in the following table.

Platform	Server Location Path
Windows Server	<p>For example, the server location path for a Windows server is:</p> <p>C:\BuildFolder\eappweb\PUBLIC</p> <p>Note that you must always provide the eappweb\PUBLIC\ENU path in the server location path (BuildFolder\ ) where you want uncompression to happen, and also for hybrid environments.</p>
Non-Windows Server	<p>For example, the server location path for a non-Windows server is:</p> <p>/export/home/sblqa1/BuildFolder/eappweb/public/enu</p> <p>Where sblqa1 is the user. The path for decompressed files is filesystem/assets.</p>

## Task Flows for Siebel Pharma

The Siebel Pharma task flows that sales representatives typically carry out are divided into the following areas:

- ["Planning and Preparing for Customer Calls"](#) on page 5-34
- ["Conducting Customer Calls"](#) on page 5-35

### Planning and Preparing for Customer Calls

Sales representatives typically perform the following tasks when planning and preparing for customer calls:

- Check the appointments for today.  
For more information, see ["Viewing Call Planning Information"](#) on page 5-2.
- Review the route for the day.  
For more information, see ["Displaying Location Details in Siebel Mobile"](#) on page 4-16.
- Review the notifications list.  
For more information, see ["Reviewing Notification Messages in Siebel Mobile"](#) on page 4-11.
- Prepare for contact calls and perform precall planning tasks (such as, reviewing the associated contact relationships and the best call times for the contact) as follows:
  - Review, modify, and create new contacts as required. For more information, see the following:
    - ["Displaying Contact Details"](#) on page 5-21
    - ["Modifying Contact Information"](#) on page 5-21

- Review, modify, and create new contact calls as required. For more information, see ["Modifying Call Information for a Contact"](#) on page 5-22.
- Review and modify as required the contact's associated addresses, best call times, state license, affiliated accounts, contact relationships, and attachments. For more information, see the following:
  - ["Modifying Address Information for a Contact"](#) on page 5-23
  - ["Modifying Best Time Information for a Contact"](#) on page 5-23
  - ["Modifying State License Information for a Contact"](#) on page 5-24
  - ["Modifying Account Affiliation Information for a Contact"](#) on page 5-25
  - ["Modifying Contact Relationship Information for a Contact"](#) on page 5-26
  - ["Modifying Attachment Information for a Contact"](#) on page 5-27
- Prepare for account calls and perform precall planning tasks (such as, reviewing the associated account relationships) as follows:
  - Review, modify, and create new accounts as required. For more information, see the following:
    - ["Displaying Account Details"](#) on page 5-13
    - ["Modifying Account Information"](#) on page 5-14
  - Review, modify, and create new account calls as required. For more information, see ["Modifying Call Information for an Account"](#) on page 5-15.
  - Review and modify as required the account's associated contacts, addresses, affiliated contacts, account relationships, and attachments. For more information, see the following:
    - ["Modifying Contact Information for an Account"](#) on page 5-14
    - ["Modifying Address Information for an Account"](#) on page 5-16
    - ["Modifying Contact Affiliation Information for an Account"](#) on page 5-17
    - ["Modifying Account Relationship Information for an Account"](#) on page 5-18
    - ["Modifying Attachment Information for an Account"](#) on page 5-18

## Conducting Customer Calls

Sales representatives typically perform the following tasks when conducting customer calls:

- Review, modify, and create new calls as required. For more information, see the following:
  - ["Modifying Attendee Information for a Call"](#) on page 5-6
  - ["Displaying Call Details"](#) on page 5-4
  - ["Modifying Call Information"](#) on page 5-5
- Review and modify as required the call's associated attendees, promotional items, samples, product details, literature, and presentation detail information. For more information, see the following:
  - ["Modifying Attendee Information for a Call"](#) on page 5-6

- ["Modifying Promotional Items for a Call"](#) on page 5-7
- ["Modifying Samples for a Call"](#) on page 5-8
- ["Modifying Product Details for a Call"](#) on page 5-9
- ["Adding Literature Information to a Call"](#) on page 5-10
- ["Viewing Presentation Detail Information for a Call"](#) on page 5-11
- Deliver personalized content and presentations to customers and capture feedback as required.  
For more information, see ["Using the PCD Viewer in Siebel Mobile"](#) on page 5-29.
- Record signatures for calls.  
For more information, see ["Capturing the Electronic Signature for a Call"](#) on page 5-12.
- Submit calls for processing.  
For more information, see ["Submitting a Call for Processing"](#) on page 5-12.
- Review the validation results for a call as required to determine any errors in the call data.  
For more information, see ["Managing Accounts for Siebel Pharma"](#) on page 5-13.

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## Using the Siebel Mobile Connected Application for Siebel Consumer Goods

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

- [Using the Home Page for Siebel Consumer Goods](#)
- [Managing Calls for Siebel Consumer Goods](#)
- [Managing Contacts for Siebel Consumer Goods](#)
- [Managing Accounts for Siebel Consumer Goods](#)
- [Managing Routes for Siebel Consumer Goods](#)
- [Managing Orders for Siebel Consumer Goods](#)
- [Managing Return Orders for Siebel Consumer Goods](#)
- [Managing Inventory for Siebel Consumer Goods](#)
- [Managing Cycle Counting for Siebel Consumer Goods](#)
- [Task Flows for Siebel Consumer Goods](#)

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**Note :** The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is not configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see "[Inline Editing](#)" on page 4-7.

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### Using the Home Page for Siebel Consumer Goods

The following procedures related to using the Siebel Mobile application for Siebel Consumer Goods home page are included in this topic:

- ["Viewing Call Planning Information on the Home Page"](#) on page 6-2
- ["Scheduling Calls for Accounts on the Home Page"](#) on page 6-2

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**Note:** You must complete the relevant setup tasks detailed in *Siebel Consumer Goods Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Consumer Goods.

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## Viewing Call Planning Information on the Home Page

On the home page, you can view the call planning information for accounts in the calendar.

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**Note:** Viewing calls in the calendar is similar to viewing activities in the calendar. For more information about using the calendar to view activities, see *Siebel Fundamentals for Siebel Open UI*.

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### To view the call planning information on the home page

1. Tap the Side Menu icon on the application banner, and then tap Home Page to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Accounts list in the left pane.
2. On the calendar in the right pane, view the call planning information as follows:
  - Tap the left and right arrows to navigate across dates and view the calls scheduled on different dates.
  - Tap the daily, weekly, or monthly calendar icon to switch between the daily, weekly, or monthly view of calls scheduled.
  - Tap Today to see the calls scheduled for today's date.
3. On the calendar in the right pane, you can perform the following tasks:
  - Extend the duration of a call by tapping the border of the call and dragging it out.
  - Move a call by tapping the call, and then dragging and dropping it on a different time or date.
  - Schedule a call for an account. For more information, see "[Scheduling Calls for Accounts on the Home Page](#)" on page 6-2.
  - Tap a call on the calendar to drill down and open the call details. For more information, see "[Displaying Call Details](#)" on page 6-3.

## Scheduling Calls for Accounts on the Home Page

On the home page, you can schedule calls for accounts in the calendar.

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**Note:** Scheduling calls in the calendar is similar to scheduling activities in the calendar. For more information about using the calendar to schedule activities, see *Siebel Fundamentals for Siebel Open UI*.

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### To schedule calls for accounts on the home page

1. Tap the Side Menu icon on the application banner, and then tap Home Page to display the following:
  - The calendar showing the call planning information in the right pane or work area.
  - The Accounts list in the left pane.



2. Schedule a new account call as follows:
  - a. Select an account from the Accounts list in the left pane.
  - b. Drag and drop the selected account onto the calendar in the right panel.
  - c. Drill down on the new call to open it. For more information, see ["Displaying Call Details"](#) on page 6-3
  - d. Modify the call details as required. For more information, see ["Modifying Call Information \(Details\) for a Call"](#) on page 6-5 and ["Modifying Call Item Information \(Activity\) for a Call"](#) on page 6-5.
  - e. Modify the related items for the call as required. For more information, see ["Displaying Call Details"](#) on page 6-3.

## Managing Calls for Siebel Consumer Goods

A *call* is a scheduled interaction that you have with a contact or an account.

The following procedures related to calls and call management are included in this topic:

- ["Displaying Call Details"](#) on page 6-3
- ["Starting a Call"](#) on page 6-4
- ["Ending a Call"](#) on page 6-4
- ["Modifying Call Information \(Details\) for a Call"](#) on page 6-5
- ["Modifying Call Item Information \(Activity\) for a Call"](#) on page 6-5
- ["Modifying Retail Audit Information for a Call"](#) on page 6-6
- ["Modifying Merchandising Audit Information for a Call"](#) on page 6-7
- ["Modifying Order Information for a Call"](#) on page 6-8
- ["Modifying Note Information for a Call"](#) on page 6-9
- ["Modifying Assessment Information for a Call"](#) on page 6-9

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**Note :** You must complete the relevant setup tasks detailed in *Siebel Consumer Goods Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Consumer Goods.

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### Displaying Call Details

You can display call details by using Call Items (as shown in the following procedure) or the calendar on the home page (as shown in ["Viewing Call Planning Information on the Home Page"](#) on page 6-2).

#### To display call details

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.
2. Tap the left and right arrows to navigate to the call that you want.

All activities for the selected call appear below the call details in the work area.

3. To view the related items for the selected call, tap the following names in the list in the left pane:
  - **Call Items.** Shows the details and activity information for the call. For more information, see ["Modifying Call Information \(Details\) for a Call"](#) on page 6-5 and ["Modifying Call Item Information \(Activity\) for a Call"](#) on page 6-5.
  - **Retail Audits.** Shows the retail audit information for the call. For more information, see ["Modifying Retail Audit Information for a Call"](#) on page 6-6.
  - **Merchandising Audits.** Shows the merchandising audit information for the call. For more information, see ["Modifying Merchandising Audit Information for a Call"](#) on page 6-7.
  - **Orders.** Shows the order information for the call. For more information, see ["Modifying Order Information for a Call"](#) on page 6-8.
  - **Notes.** Shows the note information for to the call. For more information, see ["Modifying Note Information for a Call"](#) on page 6-9.
  - **Assessments.** Shows the assessment information for the call. For more information, see ["Modifying Assessment Information for a Call"](#) on page 6-9.

## Starting a Call

To start a call, complete the following procedure.

### To start a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.
2. Tap the left and right arrows in the work area to navigate to the call that you want. All activities for the call appear below the call details in the work area.

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**Note :** You can also navigate to the call that you want by using the calendar on the home page. For more information, see ["Viewing Call Planning Information on the Home Page"](#) on page 6-2.

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3. Tap the Start button in the work area to record the start date and time for the call.
4. Review all related information for the call and update the information as required. For more information about the related information for a call, see ["Managing Calls for Siebel Consumer Goods"](#) on page 6-3.

## Ending a Call

To end a call, complete the following procedure.

### To end a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.

2. Tap the left and right arrows in the work area to navigate to the call that you want. All activities for the call appear below the call details in the work area.

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**Note :** You can also navigate to the call that you want by using the calendar on the home page. For more information, see "[Viewing Call Planning Information on the Home Page](#)" on page 6-2.

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3. Tap the End button in the work area to record the end date and time for the call.

## Modifying Call Information (Details) for a Call

Complete the following procedure to modify call information (call details).

### To modify call information

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.
2. Update an existing call as follows:
  - a. Tap the left and right arrows in the work area to navigate to the call that you want. All activities for the call appear below the call details in the work area.
  - b. Tap the record field that you want to update, and update the field value. You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new call as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the call in the fields that appear, and then save the record. Completing the Account field is mandatory.

## Modifying Call Item Information (Activity) for a Call

Complete the following procedure to modify the call item information (call activity).

### To modify the call item information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.
2. Tap the left and right arrows in the work area to navigate to the call that you want. All activities for the call appear below the call details in the work area.
3. Update an existing call activity as follows:
  - a. Tap the activity that you want to update, and then tap the Start Activity button to record the start date and time for the activity.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add a new call activity as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the activity in the fields that appear, and then save the record.

## Modifying Retail Audit Information for a Call

Complete the following procedure to modify the retail audit information for a call.

### To modify the retail audit information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.
2. Tap the left and right arrows in the work area to navigate to the call that you want. All activities for the call appear below the call details in the work area.
3. Update an existing call retail audit as follows:
  - a. Start the call activity:
    - Tap Call Items in the list in the left pane, and then tap an activity of type Retail Audit in the work area.
    - Tap the Start Activity button to record the start date and time for the selected activity.
4. Add new products for retail audit as follows:
  - a. Tap Retail Audits in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new product in the fields that appear, and then save the record.

The following table describes the fields.

Field Name	Description
Product	Select the product for audit.
Account Code	Displays the account code for the product in the customer's system. For example, the manufacturer code for a product might be SKU X728294 but the account code for the product (SKU X728294) in the customer's system might be AB2877612.
OOS	Select this check box to indicate that the product is out-of-stock. Otherwise, deselect this check box.
Back Stock	Type the quantity of the product in the back room.
Shelf Stock	Type the quantity of the product on the shelf.
Merchandising Location	Displays the merchandising location, if the product selected for audit is available within a specific merchandising location (for example, refrigerated case or specific aisle placement).

5. After completing a call retail audit, end the activity as follows:
  - a. Tap Call Items in the list in the left pane, and then tap the activity of type Retail Audit that you want to end in the work area.
  - b. Tap the End Activity button to record the end date and time for the selected activity.

## Modifying Merchandising Audit Information for a Call

Complete the following procedure to modify the merchandising audit information for a call.

### To modify the merchandising audit information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.
2. Tap the left and right arrows in the work area to navigate to the call that you want. All activities for the call appear below the call details in the work area.
3. Update an existing call merchandising audit as follows:
  - a. Start the call activity:
    - Tap Call Items in the list in the left pane, and then tap an activity of type Merchandising Audit in the work area.
    - Tap the Start Activity button to record the start date and time for the selected activity.
    - Drill down on the Merchandising Audit link in the Type field.

All the merchandising audits associated with the call appear in the work area, and all details for the call appear above the list in the work area.
  - b. In the call merchandising audit view:
    - Tap the line item that you want to update.
    - Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add new line items to a call merchandising audit as follows:
  - a. Tap Merchandising Audits in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new line item in the fields that appear, and then save the record.
5. After completing a call merchandising audit, end the activity as follows:
  - a. Tap Call Items in the list in the left pane, and then tap the activity of type Merchandising Audit that you want to end in the work area.
  - b. Tap the End Activity button to record the end date and time for the selected activity.

## Modifying Order Information for a Call

Complete the following procedure to modify the order information for a call.

### To modify the order information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.
2. Tap the left and right arrows in the work area to navigate to the call that you want. All activities for the call appear below the call details in the work area.
3. Update an existing call order as follows:
  - a. Start the call activity:
    - Tap Call Items in the list in the left pane, and then tap an activity of type Order in the work area.
    - Tap the Start Activity button to record the start date and time for the selected activity.
    - Drill down on the Order link in the Type field.

All the orders associated with the call and all details for the call appear in the work area.
  - b. In the call orders view:
    - Tap the order that you want to update.
    - Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
    - Drill down on the order number link in the Order # field.

The order detail view opens where you can review existing or add new order line items. For more information, see "[Modifying Line Item Information for an Order](#)" on page 6-25.
4. Create a new call order as follows:
  - a. Tap Orders in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new order in the fields that appear,
5. After completing a call order, end the activity as follows:
  - a. Tap Call Items in the list in the left pane, and then tap the activity of type Order that you want to end in the work area.
  - b. Tap the End Activity button to record the end date and time for the selected activity.

## Modifying Note Information for a Call

Complete the following procedure to modify the note information for a call.

### To modify the note information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.
2. Tap the left and right arrows in the work area to navigate to the call that you want. All activities for the call appear below the call details in the work area.
3. Update an existing call note as follows:
  - a. Start the call activity:
    - Tap Call Items in the list in the left pane, and then tap an activity of type Note in the work area.
    - Tap the Start Activity button to record the start date and time for the selected activity.
    - Drill down on the Notes link in the Type field.  
All the notes associated with the call and all details for the call appear in the work area.
  - b. In the call notes view:
    - Tap the note that you want to update.
    - Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new call note as follows:
  - a. Tap Notes in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new note in the fields that appear, and then save the record.
5. After completing a call note, end the activity as follows:
  - a. Tap Call Items in the list in the left pane, and then tap the activity of type Note that you want to end in the work area.
  - b. Tap the End Activity button to record the end date and time for the selected activity.

## Modifying Assessment Information for a Call

Complete the following procedure to modify the assessment information for a call.

### To modify the assessment information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:
  - The Call Items (call details and activities) in the right pane or work area.
  - A list in the left pane in which you can select the related items for calls.

2. Tap the left and right arrows in the work area to navigate to the call that you want.  
All activities for the call appear below the call details in the work area.
3. Update an existing call assessment as follows:
  - a. Start the call activity:
    - Tap Call Items in the list in the left pane, and then tap an activity of type Assessment in the work area.
    - Tap the Start Activity button to record the start date and time for the selected activity.
    - Drill down on the Assessment link in the Type field.  
All the assessments associated with the call appear in the work area, and all details for the selected call appear above the list in the work area.
  - b. In the call assessments view:
    - Tap the assessment that you want to update.
    - Tap the record field that you want to update, and update the field value.
    - You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new call assessment as follows:
  - a. Tap Assessments in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new assessment in the fields that appear, and then save the record.
5. After completing a call assessment, end the activity as follows:
  - a. Tap Call Items in the list in the left pane, and then tap the activity of type Assessment that you want to end in the work area.
  - b. Tap the End Activity button to record the end date and time for the selected activity.

## Managing Contacts for Siebel Consumer Goods

A *contact* is an individual with whom your company conducts business or expects to conduct business in the future. It can be an employee of another company, an independent consultant, a vendor, or an acquaintance.

The following procedures related to contacts and contact management are included in this topic:

- ["Displaying Contact Details"](#) on page 6-11
- ["Modifying Contact Information"](#) on page 6-11
- ["Modifying Address Information for a Contact"](#) on page 6-12
- ["Modifying Best Time Information for a Contact"](#) on page 6-12

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**Note :** You must complete the relevant setup tasks detailed in *Siebel Consumer Goods Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Consumer Goods.

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## Displaying Contact Details

You can display contact details by using the Contacts list.

### To display contact details

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
3. To view the related items for the selected contact, tap the following names in the list in the left pane:
  - **Addresses.** Shows the address information for the contact. For more information, see "[Modifying Address Information for a Contact](#)" on page 6-12.
  - **Best Times.** Shows the best time information for the contact. For more information, see "[Modifying Best Time Information for a Contact](#)" on page 6-12.

## Modifying Contact Information

Complete the following procedure to modify contact information.

### To modify contact information

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Update an existing contact as follows:
  - a. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new contact as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new contact in the fields that appear, and then save the record.

## Modifying Address Information for a Contact

Complete the following procedure to modify the address information for a contact.

### To modify the address information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
3. Update an existing contact address as follows:
  - a. Tap Addresses in the list in the left pane.

All the addresses associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing address to the contact as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the address on the list that appears, and then tap OK.
5. Create a new contact address as follows:
  - a. Tap Addresses in the list in the left pane, tap the plus (+) icon in the work area, and then tap the plus (+) icon on the list that appears.
  - b. Enter the information for the new address in the fields that appear, and then save the record.

## Modifying Best Time Information for a Contact

Complete the following procedure to modify the best-time-to-call information for a contact. This information typically applies to a contact who is a physician or another health-care provider. It is associated with an address for the contact.

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

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### To modify the best time information for the contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

- The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.  
All details for the selected contact appear below the list in the work area.
  3. Update an existing contact best time as follows:
    - a. Tap Best Times in the list in the left pane.  
All the best times associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.
    - b. Tap the best time that you want to update.
    - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
  4. Create a new contact best time as follows:
    - a. Tap Best Times in the list in the left pane, and then tap the plus (+) icon in the work area.
    - b. Enter the information for the new best time in the fields that appear, and then save the record.

## Managing Accounts for Siebel Consumer Goods

An *account* is a company or individual with whom your company conducts business. It represents the relationship between your company and that company or individual. You can use the Account Details screen as the primary navigation tool for your customer interactions.

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

- ["Displaying Account Details"](#) on page 6-14
- ["Modifying Account Information"](#) on page 6-15
- ["Modifying Contact Information for an Account"](#) on page 6-15
- ["Modifying Address Information for an Account"](#) on page 6-16
- ["Modifying Product Distribution Information for an Account"](#) on page 6-17
- ["Modifying Note Information for an Account"](#) on page 6-17
- ["Modifying Order Information for an Account"](#) on page 6-18
- ["Modifying Asset Information for an Account"](#) on page 6-19
- ["Viewing Agreement Information for an Account"](#) on page 6-19
- ["Viewing Invoice Information for an Account"](#) on page 6-20
- ["Viewing Credit Memo Information for an Account"](#) on page 6-20
- ["Modifying Merchandising Location Information for an Account"](#) on page 6-20
- ["Modifying Return Information for an Account"](#) on page 6-21
- ["Modifying Activity Information for an Account"](#) on page 6-22

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**Note :** You must complete the relevant setup tasks detailed in *Siebel Consumer Goods Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Consumer Goods.

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## Displaying Account Details

You can display account details by using the Accounts list.

### To display account details

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Tap the Pin icon in the work area to open a map showing the route between your current location and the location of the selected account.

The Pin icon persists for all account views. For more information about using the Pin icon, see "[Displaying Location Details in Siebel Mobile](#)" on page 4-16.
4. Tap the Back to Call Items button in the work area to go to the Call Items view.

The Back to Call Items button persists for all account views. For more information about call items, see "[Modifying Call Information \(Details\) for a Call](#)" on page 6-5 and "[Modifying Call Item Information \(Activity\) for a Call](#)" on page 6-5.
5. To view the related items for the selected account, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the account. For more information, see "[Modifying Contact Information for an Account](#)" on page 6-15.
  - **Addresses.** Shows the address information for the account. For more information, see "[Modifying Address Information for an Account](#)" on page 6-16.
  - **Product Distribution.** Shows the product distribution information for the account. For more information, see "[Modifying Product Distribution Information for an Account](#)" on page 6-17.
  - **Notes.** Shows the note information for the account. For more information, see "[Modifying Note Information for an Account](#)" on page 6-17
  - **Orders.** Shows the order information for the account. For more information, see "[Modifying Order Information for an Account](#)" on page 6-18.
  - **Assets.** Shows the asset information for the account. For more information, see "[Modifying Asset Information for an Account](#)" on page 6-19.
  - **Agreements.** Shows the agreement information for the account. For more information, see "[Viewing Credit Memo Information for an Account](#)" on page 6-20.

- **Invoices.** Shows the invoice information for the account. For more information, see "[Viewing Invoice Information for an Account](#)" on page 6-20.
- **Credit Memos.** Shows credit memo information for the account. For more information, see "[Viewing Credit Memo Information for an Account](#)" on page 6-20.
- **Merchandising Locations.** Shows the merchandising location information for the account. For more information, see "[Modifying Merchandising Location Information for an Account](#)" on page 6-20.
- **Returns.** Shows the return order information for the account. For more information, see "[Modifying Return Information for an Account](#)" on page 6-21.
- **Activities.** Shows the call activity for the account. For more information, see "[Modifying Activity Information for an Account](#)" on page 6-22.

## Modifying Account Information

Complete the following procedure to modify account information.

### To modify account information

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Update an existing account as follows:
  - a. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new account as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new account in the fields that appear, and then save the record.

## Modifying Contact Information for an Account

Complete the following procedure to modify the contact information for an account.

### To modify the contact information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.

3. Update an existing account contact as follows:
  - a. Tap Contacts in the list in the left pane.

All the contacts associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the account as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap OK.
5. Create a new account contact as follows:
  - a. Tap Contacts in the list in the left pane, tap the plus (+) icon in the work area, and then tap the plus (+) icon on the list that appears.
  - b. Enter the information for the new contact in the fields that appear, and then navigate away from the record to save it.
  - c. Drill down on the link in the Last Name field to see more information about the contact.

## Modifying Address Information for an Account

Complete the following procedure to modify the address information for an account.

### To modify the address information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Update an existing account address as follows:
  - a. Tap Addresses in the list in the left pane.

All the addresses associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing address to the account as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.

- b. Choose the address on the list that appears, and then tap OK.
5. Create a new account address as follows:
  - a. Tap Addresses in the list in the left pane, tap the plus (+) icon in the work area, and then tap the plus (+) icon on the list that appears.
  - b. Enter the information for the new address in the fields that appear, and then save the record.

## Modifying Product Distribution Information for an Account

Complete the following procedure to modify the product distribution information for an account.

### To modify the product distribution information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing product distribution as follows:
  - a. Tap Product Distribution in the list in the left pane.  
All the product distributions associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the product distribution that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new product distribution as follows:
  - a. Tap Product Distribution in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new product distribution in the fields that appear, and then save the record.

## Modifying Note Information for an Account

Complete the following procedure to modify the note information for an account.

### To modify the note information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account note as follows:
  - a. Tap Notes in the list in the left pane.  
All the notes associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the note that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account note as follows:
  - a. Tap Notes in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new note in the fields that appear, and then save the record.

## Modifying Order Information for an Account

Complete the following procedure to modify the order information for an account.

### To modify the order information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account order as follows:
  - a. Tap Orders in the list in the left pane.  
All orders associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the order that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account order as follows:
  - a. Tap Orders in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new order in the fields that appear, and then save the record.
  - c. Tap the link in the Order # field to go to the Orders view from where you can navigate to the Order Details view to enter order line items.



## Modifying Asset Information for an Account

An *asset* is property or an item of value that your company owns. Complete the following procedure to modify the asset information for an account.

### To modify the asset information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Update an existing account asset as follows;
  - a. Tap Assets in the list in the left pane.

All assets associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the asset that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account asset as follows:
  - a. Tap Assets in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new asset in the fields that appear, and then save the record.

## Viewing Agreement Information for an Account

Complete the following procedure to view the agreement information for an account.

### To view the agreement information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Tap Agreements in the list in the left pane.

All the agreements associated with the account appear in the work area, and all details for the selected account appear above the Agreements list in the work area.

## Viewing Invoice Information for an Account

Complete the following procedure to view the invoice information for an account.

### To view the invoice information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Tap Invoices in the list in the left pane.

All the invoices associated with the account appear in the work area, and all details for the selected account appear above the Invoices list in the work area.

## Viewing Credit Memo Information for an Account

A *credit memo* is issued by an organization to a retailer to reduce the amount that the retailer owes from a previously issued sales invoice. Complete the following procedure to view the credit memo information for an account.

### To view the credit memo information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Tap Credit Memos in the list in the left pane.

All the credit memos associated with the account appear in the work area, and all details for the selected account appear above the Invoices list in the work area.

## Modifying Merchandising Location Information for an Account

A *merchandising location* is a physical location where products can exist, such as one or more display locations in a retail outlet or in a bin in a warehouse. Complete the following procedure to modify the merchandising location information for an account.

### To modify the merchandising location information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.

3. Update an existing account merchandising location as follows:
  - a. Tap Merchandising Locations in the list in the left pane.  
All the merchandising locations associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the merchandising location that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account merchandising location as follows:
  - a. Tap Merchandising Locations in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new merchandising location in the fields that appear, and then save the record.

## Modifying Return Information for an Account

A *return* is an order that the customer returns. Complete the following procedure to modify the return information for an account.

### To modify the return information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account return as follows:
  - a. Tap Returns in the list in the left pane.  
All the returns associated with the selected account appear below the list in the work area.
  - b. Tap the return that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account return as follows:
  - a. Tap Returns in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Drill down on the return order number link in the RMA # field.  
The return order detail view opens where you can enter the return order line items. For more information, see "[Modifying Line Item Information for a Return Order](#)" on page 6-27.

## Modifying Activity Information for an Account

Complete the following procedure to modify the activity information for an account.

### To modify the activity information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the account appear below the list in the work area.
3. Update an existing account activity as follows:
  - a. Tap Activities in the list in the left pane.

All the activities associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the activity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account activity as follows:
  - a. Tap Activities in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity in the fields that appear, and then save the record.

## Managing Routes for Siebel Consumer Goods

A *route* indicates which accounts a sales representative plans to visit on a particular day.

The following procedures related to routes and route management are included in this topic:

- ["Displaying Route Details"](#) on page 6-22
- ["Viewing Route Account Information for a Route"](#) on page 6-23

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**Note :** You must complete the relevant setup tasks detailed in *Siebel Consumer Goods Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Consumer Goods.

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### Displaying Route Details

You can display route details by using the Routes list.

#### To display route details

1. Tap the Side Menu icon on the application banner, and then tap Routes to display the following:

- The Routes list and details for the selected route in the right pane or work area.
  - A list in the left pane in which you can select the related items for routes.
2. Tap a route in the Routes list.  
All details for the selected route appear below the list in the work area.
  3. To view the related items for the selected route, tap the following names in the list in the left pane:
    - **Route Accounts.** Shows the route account information for the route. For more information, see "[Viewing Route Account Information for a Route](#)" on page 6-23.

## Viewing Route Account Information for a Route

Complete the following procedure to view the route account information for a route.

### To view the route account information for a route

1. Tap the Side Menu icon on the application banner, and then tap Routes to display the following:
  - The Routes list and details for the selected route in the right pane or work area.
  - A list in the left pane in which you can select the related items for routes.
2. Tap a route in the Routes list.  
All details for the selected route appear below the list in the work area.
3. Tap Route Accounts in the list in the left pane (or drill down on the link in the Route Name field).  
All the accounts associated with the route appear in the work area, and all details for the selected route appear above the list in the work area.

## Managing Orders for Siebel Consumer Goods

An *order* is a commitment on the part of the customer to purchase products and services at a specific price. It can be generated from a quote or created directly by a sales person, call center agent, and sales administrator.

The following procedures related to orders and order management are included in this topic:

- "[Displaying Order Details](#)" on page 6-24
- "[Modifying Order Information](#)" on page 6-24
- "[Modifying Line Item Information for an Order](#)" on page 6-25

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

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## Displaying Order Details

You can display order details by using the Orders list.

### To display order details

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Tap an order in the Orders list.  
All details for the selected order appear below the list in the work area.
3. To view the related items for the selected order, tap the following names in the list in the left pane:
  - **Order Detail.** Shows the line items associated with the selected order. For more information, see "[Modifying Line Item Information for an Order](#)" on page 6-25.

## Modifying Order Information

Complete the following procedure to modify order information.

### To modify order information

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Update an existing order as follows:
  - a. Tap an order in the Orders list.  
All details for the selected order appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new order as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new order in the fields that appear, and then save the record.

The following table describes the fields.

Field Name	Description
Order Date	Displays the date the order was created.
Order Number	Displays the order number.
Type	Displays the order type, such as, Sales Order, Transportation Order or Web Order.

Field Name	Description
Status	Select a status for the order. For example: Pending, New, Open, Booked, In-Transit, Shipped, Billed, Active, Paid, Closed, and so on.
Account	Select an account to associate the order to.
Location	Displays the account's site location. This field fills in after you choose an account.
Price List	Select a price list to associate with the order.
Tax List	Select a tax list to associate with the order.
Priority	Select a priority (High, Medium, Low, Urgent) for the order.
Discount Percent	Select a discount to associate with the order if applicable.
Available Credit	Displays the account's available credit. This field fills in after you choose an account.
State	Displays the account's state location. This field fills in after you choose an account.
Pymt Mthd	Select the payment method for the order.

## Modifying Line Item Information for an Order

Complete the following procedure to modify the line item information for an order.

### To modify the line item information for an order

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Tap an order in the Orders list.  
All details for the selected order appear below the list in the work area.
3. Update an existing order line item as follows:
  - a. Tap Order Detail in the list in the left pane.  
All the line items associated with the order appear in the work area, and all details for the selected order appear above the Line Items list in the work area.
  - b. Tap the order line item that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new order line item as follows:
  - a. Tap Order Detail in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new order line item in the fields that appear, and then save the record.

## Managing Return Orders for Siebel Consumer Goods

A *return order* is an order that the customer returns. It contains products or services that the customer purchased on a specific date.

The following procedures related to returns and return management are included in this topic:

- ["Displaying Return Order Details"](#) on page 6-26
- ["Modifying Return Order Information"](#) on page 6-26
- ["Modifying Line Item Information for a Return Order"](#) on page 6-27

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**Note :** You must complete the relevant setup tasks detailed in *Siebel Consumer Goods Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Consumer Goods.

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### Displaying Return Order Details

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

#### To display return order details

1. Tap the Side Menu icon on the application banner, and then tap Returns to display the following:
  - The Return Order list and details for the selected return order in the right pane or work area.
  - A list in the left pane in which you can select the related items for return orders.
2. Tap a return order in the Return Order list.

All details for the selected return order appear below the list in the work area.
3. To view the related items for the selected return order, tap the following names in the left pane:
  - **Order Detail.** Shows the line items associated with the selected return order. For more information, see ["Modifying Line Item Information for a Return Order"](#) on page 6-27.

### Modifying Return Order Information

Complete the following procedure to modify return order information.

#### To modify return order information

1. Tap the Side Menu icon on the application banner, and then tap Return to display the following:
  - The Return Order list and details for the selected return order in the right pane or work area.
  - A list in the left pane in which you can select the related items for return orders.
2. Update an existing return order as follows:
  - a. Tap a return order in the Return Order list.

All details for the selected return order appear below the list in the work area.



- b. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new return order as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new return order in the fields that appear, and then save the record.

The following table describes the field.

Field Name	Description
Order Date	Displays the date the order was created.
Order Number	Displays the order number.
Type	Displays the order type, such as, RMA Return and RMA Exchange.
Status	Displays the status of the order. For example: Pending, New, Open, Booked, In-Transit, Shipped, Billed, Active, Paid, Closed, and so on.
Account	Select an account to associate the order to.
Location	Displays the account's site location. This field fills in after you choose an account.
Price List	Select a price list to associate with the order.
Tax List	Select a tax list to associate with the order.
Priority	Select a priority (High, Medium, Low, Urgent) for the order.
Discount Percent	Select a discount to associate with the order if applicable.
Pymt Mthd	Select the payment method for the order.
Avail Credit	Displays the account's available credit. This field fills in after you choose an account.
State	Displays the account's state location. This field fills in after you choose an account.

## Modifying Line Item Information for a Return Order

Complete the following procedure to modify the line item information for a return order.

### To modify the line item information for a return order

1. Tap the Side Menu icon on the application banner, and then tap Returns to display the following:
  - The Return Order list and details for the selected return order in the right pane or work area.
  - A list in the left pane in which you can select the related items for return orders.
2. Tap a return order in the Return Order list.  
All details for the selected return order appear below the list in the work area.
3. Update an existing return order line item as follows:
  - a. Tap Order Detail in the list in the left pane, and then tap a return order line item in the work area.

- b. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
- 4. Create a new return order line item as follows:
  - a. Tap Order Detail in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new return order line item in the fields that appear, and then save the record.

## Managing Inventory for Siebel Consumer Goods

Sales representatives, presales representatives, and delivery representatives often capture orders, invoice, collect payments, and perform retail audits. All these activities are part of the inventory and order management process.

The following procedures related to inventory management are included in this topic:

- ["Displaying Inventory Details"](#) on page 6-28
- ["Recording Van Information"](#) on page 6-29
- ["Viewing Reconciliation Information for the Inventory"](#) on page 6-30

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**Note :** You must complete the relevant setup tasks detailed in *Siebel Consumer Goods Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Consumer Goods.

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### Displaying Inventory Details

You can display inventory details by using the Inventory list.

#### To display inventory details

1. Tap the Side Menu icon on the application banner, and then tap Inventory to display the following:
  - The Inventory details (Van Plate and Serial number) in the right pane or work area.
  - A list in the left pane in which you can select the related items for inventories.
2. Tap the left and right arrows in the right pane to navigate to the inventory that you want.

A list of all products in the van appears below the inventory details in the work area. The following table describes the fields.

Field Name	Description
Product	The product name in the inventory.
SKU/UPC	The unique code associated with the product.
Quantity	The quantity of the product in the inventory.
Status	The status of the product in the inventory (for example, Good or Defective).

3. To view the related items for the selected inventory, tap the following names in the left pane:
  - **Vehicle Details.** Shows the details of the van associated with the selected inventory. For more information, see "[Recording Van Information](#)" on page 6-29.
  - **Reconciliation.** Shows the reconciliation information for each product in the van. For more information, see "[Viewing Reconciliation Information for the Inventory](#)" on page 6-30.

## Recording Van Information

Before leaving the depot, a van sales representative verifies the van identification information and records the van's mileage.

### To record van information

1. Tap the Side Menu icon on the application banner, and then tap Inventory to display the following:
  - The Inventory details (Van Plate and Serial number) in the right pane or work area.
  - A list in the left pane in which you can select the related items for inventories.
2. Tap the left and right arrows in the right pane to navigate to the inventory that you want.

A list of all products in the van appears below the inventory details in the work area. The table in "[Displaying Inventory Details](#)" on page 6-28 describes the fields.

3. Verify that the values in the following fields are correct:
  - Van Plate Number
  - Serial Number
4. Add a new mileage reading for the van as follows:
  - a. Tap Vehicle Details in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the van's current mileage in the Reading field, and then save the record.

The following table describes the other fields, which are mostly read-only.

Field Name	Description
Reading	Enter the van's current mileage.
U/M	The unit of measure specified when the asset is set up.
Time Taken	The time that you not the mileage. This time might be before or at the time that you create the record.
Reading #	A unique ID number for each reading.
Created	The time that you create the record.
Created By	The name of the person who creates the record.
Complete	Check box indicating whether the reading has been committed (checked) or not (unchecked).

- c. Tap the Complete check box to commit the reading when you complete it.

## Viewing Reconciliation Information for the Inventory

Delivering products, taking returns, and exchanging products with other representatives all impact the inventory. Periodically during the day, sales representatives can check to be sure that the inventory properly reflects all these changes.

### To view the reconciliation information for the inventory

1. Tap the Side Menu icon on the application banner, and then tap Inventory to display the following:
  - The Inventory details (Van Plate and Serial number) in the right pane or work area.
  - A list in the left pane in which you can select the related items for inventories.
2. Tap the left and right arrows in the right pane to navigate to the inventory that you want.

A list of all products in the van appears below the inventory details in the work area. The table in "[Displaying Inventory Details](#)" on page 6-28 describes the fields.
3. Tap Reconciliation in the list in the left pane.

Review the reconciliation information for each product in the van. The information in this view is read-only.

## Managing Cycle Counting for Siebel Consumer Goods

Before visiting outlets, van sales representatives must verify that the inventory on their mobile device matches the actual inventory in their van. Inventory is verified by performing a cycle count.

The following procedures related to cycle counting are included in this topic:

- "[Viewing Cycle Counts](#)" on page 6-30
- "[Performing a Cycle Count](#)" on page 6-31
- "[Modifying Product Information for a Cycle Count](#)" on page 6-32

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**Note :** You must complete the relevant setup tasks detailed in *Siebel Consumer Goods Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Consumer Goods.

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## Viewing Cycle Counts

You can view cycle counts by using the Cycle Count list.

### To view cycle counts

1. Tap the Side Menu icon on the application banner, and then tap Cycle Counting to display the following:
  - The Cycle Count list in the right pane or work area.
  - A list in the left pane in which you can select the related items for cycle counts.
2. Tap a cycle count in the Cycle Count list.

The following table describes the fields in the Cycle Count list.

Field Name	Description
Status	The cycle count status, which can be one of the following: Assigned, Closed, Done, In Progress, Open, or Scheduled.  Drill down on the link in the Status field to see the product information for the cycle count. For more information, see " <a href="#">Modifying Product Information for a Cycle Count</a> " on page 6-32.
Inv Location	The location of the inventory associated with the cycle count.  Drill down on the link in the Inv Location field to see the details of the inventory location for the cycle count.
Due Date	The date that the cycle count is due.
Start Date #	The cycle count start time.
End Date	The cycle count end time.
Comments	The cycle count description.

3. To view the related items for cycle counts, tap the following names in the left pane:
  - **My Pending Cycle Products.** Shows the cycle counts list, from where you can start and end a cycle count. For more information, see "[Performing a Cycle Count](#)" on page 6-31.
  - **Cycle Count Products.** Shows the products associated with a cycle count. For more information, see "[Modifying Product Information for a Cycle Count](#)" on page 6-32.

## Performing a Cycle Count

Van sales representatives verify their inventory by performing a cycle count.

### To perform a cycle count

1. Tap the Side Menu icon on the application banner, and then tap Cycle Counting to display the following:
  - The Cycle Count list in the right pane or work area.
  - A list in the left pane in which you can select the related items for cycle counts.
2. Tap a cycle count for the current date and time in the Cycle Count list.  
Alternatively, tap the plus (+) icon in the work area to create a new cycle count.
3. To perform the cycle count:
  - a. Tap the Start button in the work area.  
  
Tapping Start navigates the user to the Cycle Count Products view, records the start time for the cycle count, and changes the status of the cycle count to In Progress.  
  
For an existing cycle count that has not been started, drill down on the Open link in the Status field.
  - b. Tap the List Products button in the work area.  
  
This populates the list of products for the cycle count by returning all products in the current van inventory belonging to the sales representative. This includes various product buckets such as Good, Defective, and so on.

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**Note :** Tapping List Products shows all products in the current van inventory belonging to a particular sales representative. This includes the various product buckets such as, Good, Defective, and so on.

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- c. Verify the count of stock in your van and then enter the amounts of each item in the Count column.

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**Note :** You can also use the Count UOM1 and Count UOM2 fields to capture the count of the physical inventory. These fields represent two units of measure that are related by Case Pack, which is a value that the administrator sets up. Updates to the Count UOM1 and Count UOM2 fields also update the Count when it is committed based on the Case Pack.

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- d. Tap Count Complete when you are finished entering the inventory amounts. The Cycle Count Product records are locked, preventing any further changes.
- e. If there are products with variances greater or less than zero, then select those products and tap the Adjust button to update the inventory with the current count.

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**Note :** The Adjust button processes the selected records only. Use CTRL+Tap to select multiple records.

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4. To finish the cycle count:
  - a. Tap My Pending Cycle Counts in the list in the left pane
  - b. Tap the End button in the work area.

The value in the Status field changes from In Progress to Done.

## Modifying Product Information for a Cycle Count

Complete the following procedure to modify the product information for a cycle count.

### To modify the product information for a cycle count

1. Tap the Side Menu icon on the application banner, and then tap Cycle Counting to display the following:
  - The Cycle Count list in the right pane or work area.
  - A list in the left pane in which you can select the related items for cycle counts.
2. Tap a cycle count, which has the current date and time, in the Cycle Count list. Alternatively, tap the plus (+) icon in the work area to create a new cycle count.
3. Add new products to the cycle count as follows:
  - a. Tap Cycle Count Products in the list in the left pane, and then tap the plus (+) icon in the work area.

Products that are in the current van inventory belonging to the sales representative can be added.

- b. Enter the information for the new product in the fields that appear, and then save the record.

Only products that are in the current van inventory belonging to the sales representative can be added.

## Task Flows for Siebel Consumer Goods

The Siebel Consumer Goods task flows that sales representatives typically carry out are divided into the following areas:

- ["Performing Daily Tasks for Siebel Consumer Goods"](#) on page 6-33
- ["Performing Supplemental Tasks for Siebel Consumer Goods"](#) on page 6-34

### Performing Daily Tasks for Siebel Consumer Goods

Field representatives typically perform the following tasks in the following approximate order:

1. Before you start your calls for the day, review and check the calls that are scheduled.

For more information, see ["Displaying Call Details"](#) on page 6-3.

2. When you arrive at a call destination, review the call information, required activities, optional activities, and all other call related information.

For more information, see the following:

- ["Starting a Call"](#) on page 6-4
- ["Modifying Call Item Information \(Activity\) for a Call"](#) on page 6-5

3. One of your assigned activities might be to conduct a retail audit or a merchandising audit.

For more information, see the following:

- ["Modifying Retail Audit Information for a Call"](#) on page 6-6
- ["Modifying Merchandising Audit Information for a Call"](#) on page 6-7

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

For more information, see the following:

- ["Modifying Order Information for a Call"](#) on page 6-8
- ["Managing Orders for Siebel Consumer Goods"](#) on page 6-23

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

For more information, see the following:

- ["Ending a Call"](#) on page 6-4
- ["Modifying Note Information for a Call"](#) on page 6-9
- ["Modifying Assessment Information for a Call"](#) on page 6-9

## Performing Supplemental Tasks for Siebel Consumer Goods

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

- ["Modifying Contact Information"](#) on page 6-11
- ["Modifying Account Information"](#) on page 6-15
- ["Managing Calls for Siebel Consumer Goods"](#) on page 6-3
- ["Managing Contacts for Siebel Consumer Goods"](#) on page 6-10
- ["Managing Accounts for Siebel Consumer Goods"](#) on page 6-13
- ["Managing Routes for Siebel Consumer Goods"](#) on page 6-22
- ["Managing Orders for Siebel Consumer Goods"](#) on page 6-23
- ["Managing Return Orders for Siebel Consumer Goods"](#) on page 6-26
- ["Managing Inventory for Siebel Consumer Goods"](#) on page 6-28
- ["Managing Cycle Counting for Siebel Consumer Goods"](#) on page 6-30



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## Using the Siebel Mobile Connected Application for Siebel Sales

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

- [Managing Activities for Siebel Sales](#)
- [Managing Contacts for Siebel Sales](#)
- [Managing Leads for Siebel Sales](#)
- [Managing Opportunities for Siebel Sales](#)
- [Managing Quotes for Siebel Sales](#)
- [Managing Orders for Siebel Sales](#)
- [Managing Activities for Siebel Sales](#)

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**Note:** The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is not configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see "[Inline Editing](#)" on page 4-7.

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### Managing Accounts for Siebel Sales

An *account* is a company or individual with whom your company conducts business. It represents the relationship between your company and that company or individual. You can use the Account Details screen as the primary navigation tool for your customer interactions.

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

- ["Displaying Account Details"](#) on page 7-2
- ["Modifying Account Information"](#) on page 7-2
- ["Modifying Contact Information for an Account"](#) on page 7-3
- ["Modifying Opportunity Information for an Account"](#) on page 7-3
- ["Modifying Address Information for an Account"](#) on page 7-4
- ["Modifying Activity Information for an Account"](#) on page 7-5
- ["Modifying Account Team Information for an Account"](#) on page 7-6

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

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## Displaying Account Details

You can display account details by using the Accounts list.

### To display account details

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. To view the related items for the selected account, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the account. For more information, see "[Modifying Contact Information for an Account](#)" on page 7-3.
  - **Opportunities.** Shows the opportunity information for the account. For more information, see "[Modifying Opportunity Information for an Account](#)" on page 7-3.
  - **Addresses.** Shows the address information for the account. For more information, see "[Modifying Address Information for an Account](#)" on page 7-4.
  - **Activities.** Shows the activity information for the account. For more information, see "[Modifying Activity Information for an Account](#)" on page 7-5.
  - **Account Team.** Shows the account team information for the account. For more information, see "[Modifying Account Team Information for an Account](#)" on page 7-6.

## Modifying Account Information

Complete the following procedure to modify account information.

### To modify account information

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Update an existing account as follows:
  - a. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

3. Create a new account as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new account in the fields that appear, and then save the record.

## Modifying Contact Information for an Account

Complete the following procedure to modify the contact information for an account.

### To modify the contact information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account contact as follows:
  - a. Tap Contacts in the list in the left pane.  
All the contacts associated with the account appear in the work area, and all details for the selected account appear above the Contacts list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the account as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap OK.
5. Create a new account contact as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new contact in the fields that appear, and then save the record.

## Modifying Opportunity Information for an Account

Complete the following procedure to modify the opportunity information for an account.

### To modify the opportunity information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

- The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
  3. Update an existing account opportunity as follows:
    - a. Tap Opportunities in the list in the left pane.  
All the opportunities associated with the account appear in the work area, and all details for the selected account appear above the Opportunities list in the work area.
    - b. Tap the opportunity that you want to update.
    - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
  4. Create a new account opportunity as follows:
    - a. Tap Opportunities in the list in the left pane, and then tap the plus (+) icon in the work area.
    - b. Enter the information for the new opportunity in the fields that appear, and then save the record.

## Modifying Address Information for an Account

Complete the following procedure to modify the address information for an account.

### To modify the address information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.  
All details for the selected account appear below the list in the work area.
3. Update an existing account address as follows:
  - a. Tap Addresses in the list in the left pane.  
All the addresses associated with the account appear in the work area, and all details for the selected account appear above the Addresses list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add an existing address to the account as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the Address on the list that appears, and then tap OK.
5. Create a new account address as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new address in the fields that appear, and then save the record.

## Modifying Activity Information for an Account

Complete the following procedure to modify the activity information for an account.

### To modify the activity information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Update an existing account activity as follows:
  - a. Tap Activities in the list in the left pane.

All the activities associated with the account appear in the work area, and all details for the selected account appear above the Activities list in the work area.
  - b. Tap the activity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account activity as follows:
  - a. Tap Activities in the list in the left pane, then tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity in the fields that appear, and then save the record.

## Modifying Account Team Information for an Account

Complete the following procedure to modify the account team information for an account.

### To modify the account team information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Update an existing account team as follows:
  - a. Tap Account Team in the list in the left pane.

All the team members associated with the account appear in the work area, and all details for the selected account appear above the Account Team list in the work area.
  - b. Tap the team member that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You can update the Role field and Primary check box only. You must navigate away from the record to save your changes to it.
4. Add an existing person to the account team as follows:
  - a. Tap Account Team in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the person on the list that appears, and then tap OK.

## Managing Contacts for Siebel Sales

A *contact* is an individual with whom your company conducts business or expects to conduct business in the future. It can be an employee of another company, an independent consultant, a vendor, or an acquaintance.

The following procedures related to contacts and contact management are included in this topic:

- ["Displaying Contact Details"](#) on page 7-7
- ["Modifying Contact Information"](#) on page 7-7
- ["Modifying Opportunity Information for a Contact"](#) on page 7-8
- ["Modifying Contact Team Information for a Contact"](#) on page 7-8
- ["Modifying Address Information for a Contact"](#) on page 7-9

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

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## Displaying Contact Details

You can display contact details by using the Contacts list.

### To display contact details

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
3. To view the related items for the selected contact, tap the following names in the list in the left pane:
  - **Opportunities.** Shows the opportunity information for the contact. For more information, see "[Modifying Opportunity Information for a Contact](#)" on page 7-8.
  - **Contact Team.** Shows the contact team information for the contact. For more information, see "[Modifying Contact Team Information for a Contact](#)" on page 7-8.
  - **Addresses.** Shows the address information for the contact. For more information, see "[Modifying Address Information for a Contact](#)" on page 7-9.

## Modifying Contact Information

Complete the following procedure to modify contact information.

### To modify contact information

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Update an existing contact as follows:
  - a. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new contact as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new contact in the fields that appear, and then save the record.

## Modifying Opportunity Information for a Contact

Complete the following procedure to modify the opportunity information for a contact.

### To modify the opportunity information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
3. Update an existing contact opportunity as follows:
  - a. Tap Opportunities in the list in the left pane.

All the opportunities associated with the contact appear in the work area, and all details for the selected contact appear above the Opportunities list in the work area.
  - b. Tap the opportunity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing opportunity to the contact as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the opportunity on the list that appears, and then tap OK.
5. Create a new contact opportunity as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new opportunity in the fields that appear, and then save the record.

## Modifying Contact Team Information for a Contact

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

### To modify the contact team information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.



3. Update an existing contact team as follows:
  - a. Tap Contact Team in the list in the left pane.

All the team members associated with the contact appear in the work area, and all details for the selected contact appear above the Contact Team list in the work area.
  - b. Tap the team member that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You can update only the Role field and Primary check box. You must navigate away from the record to save your changes to it.
4. Add an existing person to the contact team as follows:
  - a. Tap Contact Team in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the person on the list that appears, and then tap OK.

## Modifying Address Information for a Contact

Complete the following procedure to modify the address information for a contact.

### To modify the address information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.
3. Update an existing contact address as follows:
  - a. Tap Addresses in the list in the left pane.

All the addresses associated with the contact appear in the work area, and all details for the selected contact appear above the Addresses list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing address to the contact as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the address on the list that appears, then tap OK.
5. Create a new contact address as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the double plus (++) icon in the work area.

- b. Enter the information for the new address in the fields that appear, and then save the record.

## Managing Leads for Siebel Sales

A *lead* is a new prospect or existing customer who might become an opportunity.

The following procedures related to leads and lead management are included in this topic:

- "Displaying Lead Details" on page 7-10
- "Modifying Lead Information" on page 7-10
- "Modifying Opportunity Information for a Lead" on page 7-11
- "Converting a Lead to an Opportunity" on page 7-11

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

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### Displaying Lead Details

You can display lead details by using the Leads list.

#### To display lead details

1. Tap the Side Menu icon on the application banner, and then tap Leads to display the following:
  - The Leads list and details for the selected lead in the right pane or work area.
  - A list in the left pane in which you can select the related items for leads.
2. Tap a lead in the Leads list.

All details for the selected lead appear below the list in the work area.
3. To view the related items for the selected lead, tap the following name in the list in the list in the left pane:
  - **Opportunities.** Shows the opportunity information for the lead. For more information, see "Modifying Opportunity Information for a Lead" on page 7-11.

### Modifying Lead Information

Complete the following procedure to modify lead information.

#### To modify lead information

1. Tap the Side Menu icon on the application banner, and then tap Leads to display the following:
  - The Leads list and details for the selected lead in the right pane or work area.
  - A list in the left pane in which you can select the related items for leads.
2. Update an existing lead as follows:
  - a. Tap a lead in the Leads list.

All details for the selected lead appear below the list in the work area.

- b. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new lead as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new lead in the fields that appear, and then save the record.

## Modifying Opportunity Information for a Lead

Complete the following procedure to modify the opportunity information for a lead.

### To modify the opportunity information for a lead

1. Tap the Side Menu icon on the application banner, and then tap Leads to display the following:
  - The Leads list and details for the selected lead in the right pane or work area.
  - A list in the left pane in which you can select the related items for leads.
2. Tap a lead in the Leads list.  
All details for the selected lead appear below the list in the work area.
3. Update an existing lead opportunity as follows:
  - a. Tap Opportunities in the list in the left pane.  
All the opportunities associated with the lead appear in the work area, and all details for the selected lead appear above the Opportunities list in the work area.
  - b. Tap the opportunity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing opportunity to the lead as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the opportunity on the list that appears, and then tap OK.
5. Create a new lead opportunity as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new opportunity in the fields that appear, and then save the record.

## Converting a Lead to an Opportunity

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

### To convert a lead to an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Leads to display the following:
  - The Leads list and details for the selected lead in the right pane or work area.
  - A list in the left pane in which you can select the related items for leads.
2. Tap a lead in the Leads list.

All details for the selected lead appear below the list in the work area.
3. Tap Convert to convert the lead to an opportunity.

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**Note:** You can convert only a lead that includes a contact. If the lead includes a prospect, then you must promote the prospect to a contact before you can convert the lead to an opportunity.

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## Managing Opportunities for Siebel Sales

An *opportunity* is a potential revenue-generating event. It is usually associated with an account and one or more contacts, products, activities, and quotes.

The following procedures related to opportunities and opportunity management are included in this topic:

- ["Displaying Opportunity Details"](#) on page 7-12
- ["Modifying Opportunity Information"](#) on page 7-13
- ["Modifying Contact Information for an Opportunity"](#) on page 7-14
- ["Modifying Product Information for an Opportunity"](#) on page 7-14
- ["Modifying Quote Information for an Opportunity"](#) on page 7-15
- ["Converting an Opportunity to a Quote"](#) on page 7-16
- ["Modifying Activity Information for an Opportunity"](#) on page 7-16
- ["Modifying Opportunity Team Information for an Opportunity"](#) on page 7-17

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

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## Displaying Opportunity Details

You can display opportunity details by using the Opportunities list.

### To display opportunity details

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.

2. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear below the list in the work area.
3. To view the related items for the selected opportunity, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the opportunity. For more information, see ["Modifying Contact Information for an Opportunity"](#) on page 7-14.
  - **Products.** Shows the product information for the opportunity. For more information, see ["Modifying Product Information for an Opportunity"](#) on page 7-14.
  - **Quotes.** Shows the quote information for the opportunity. For more information, see ["Modifying Quote Information for an Opportunity"](#) on page 7-15 and ["Converting an Opportunity to a Quote"](#) on page 7-16.
  - **Activities.** Shows the activity information for the opportunity. For more information, see ["Modifying Activity Information for an Opportunity"](#) on page 7-16.
  - **Opportunity Team.** Shows the opportunity team information for the opportunity. For more information, see ["Modifying Opportunity Team Information for an Opportunity"](#) on page 7-17.

## Modifying Opportunity Information

Complete the following procedure to modify opportunity information.

### To modify opportunity information

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Update an existing opportunity as follows:
  - a. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new opportunity as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new opportunity in the fields that appear, and then save the record.

## Modifying Contact Information for an Opportunity

Complete the following procedure to modify the contact information for an opportunity.

### To modify the contact information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.

All details for the selected opportunity appear below the list in the work area.
3. Update an existing opportunity contact as follows:
  - a. Tap Contacts in the list in the left pane.

All the contacts associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the Contacts list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the opportunity as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap OK.
5. Create a new opportunity contact as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new contact in the fields that appear, and then save the record.

## Modifying Product Information for an Opportunity

Complete the following procedure to modify the product information for an opportunity.

### To modify the product information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.

2. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear below the list in the work area.
3. Update an existing opportunity product as follows:
  - a. Tap Products in the list in the left pane.  
All the products associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the Products list in the work area.
  - b. Tap the product that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new opportunity product as follows:
  - a. Tap Products in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new product in the fields that appear, and then save the record.

## Modifying Quote Information for an Opportunity

Complete the following procedure to modify the quote information for an opportunity.

### To modify the quote information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear below the list in the work area.
3. Update an existing opportunity quote as follows:
  - a. Tap Quotes in the list in the left pane.  
All the quotes associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the Quotes list in the work area.
  - b. Tap the quote that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new opportunity quote as follows:
  - a. Tap Quotes in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new quote in the fields that appear, and then save the record.

## Converting an Opportunity to a Quote

When you create a quote from an opportunity using the Auto Quote link, a quote record is automatically created for the opportunity using the data from the opportunity. Quote items are created from products associated with an opportunity. Any opportunity products that have the Auto Quote flag checked are also copied to the quote record.

### To convert an opportunity to a quote

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.

All details for the selected opportunity appear below the list in the work area.
3. Tap Quotes in the list in the left pane.
4. Tap Auto Quote to create a quote from the opportunity.

## Modifying Activity Information for an Opportunity

Complete the following procedure to modify the activity information for an opportunity.

### To modify the activity information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.

All details for the selected opportunity appear below the list in the work area.
3. Update an existing opportunity activity as follows:
  - a. Tap Activities in the list in the left pane.

All the activities associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the Activities list in the work area.
  - b. Tap the activity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new opportunity activity as follows:
  - a. Tap Activities in the list in the left pane, and then tap the plus (+) icon in the work area.



- b. Enter the information for the new activity in the fields that appear, and then save the record.

## Modifying Opportunity Team Information for an Opportunity

Complete the following procedure to modify the opportunity team information for an opportunity.

### To modify the opportunity team information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear above the list in the work area.
3. Update an existing opportunity team as follows:
  - a. Tap Opportunity Team in the list in the left pane.  
All the team members associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the Opportunity Team list in the work area.
  - b. Tap the team member that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You can update only the Role field and Primary check box. You must navigate away from the record to save your changes to it.
4. Add an existing person to the opportunity team as follows:
  - a. Tap Opportunity Team in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the person on the list that appears, and then tap OK.

## Managing Quotes for Siebel Sales

A *quote* is an offer to a customer for specific products and services at a specific price. It includes effective dates, prices, and discounts.

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

- ["Displaying Quote Details"](#) on page 7-18
- ["Modifying Quote Information"](#) on page 7-18
- ["Modifying Line Item Information for a Quote"](#) on page 7-19
- ["Modifying Order Information for a Quote"](#) on page 7-19
- ["Converting a Quote to an Order"](#) on page 7-20
- ["Modifying Quote Team Information for a Quote"](#) on page 7-20

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

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## Displaying Quote Details

You can display quote details by using the Quotes list.

### To display quote details

1. Tap the Side Menu icon on the application banner, and then tap Quotes to display the following:
  - The Quotes list and details for the selected quote in the right pane or work area.
  - A list in the left pane in which you can select the related items for quotes.
2. Tap a quote in the Quotes list.

All details for the selected quote appear below the list in the work area.
3. To view the related items for the selected quote, tap the following names in the list in the left pane:
  - **Line Items.** Shows the quote item information for the quote. For more information, see "[Modifying Line Item Information for a Quote](#)" on page 7-19.
  - **Orders.** Shows the order information for the quote. For more information, see "[Modifying Order Information for a Quote](#)" on page 7-19 and "[Converting a Quote to an Order](#)" on page 7-20.
  - **Quote Team.** Shows the quote team information for the quote. For more information, see "[Modifying Quote Team Information for a Quote](#)" on page 7-20.

## Modifying Quote Information

Complete the following procedure to modify quote information.

### To modify quote information

1. Tap the Side Menu icon on the application banner, and then tap Quotes to display the following:
  - The Quotes list and details for the selected quote in the right pane or work area.
  - A list in the left pane in which you can select the related items for quotes.
2. Update an existing quote as follows:
  - a. Tap a quote in the Quotes list.

All quote details for the selected quote appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

3. Create a new quote as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new quote in the fields that appear, and then save the record.

## Modifying Line Item Information for a Quote

Complete the following procedure to modify the line item information for a quote.

### To modify the line item information for a quote

1. Tap the Side Menu icon on the application banner, and then tap Quotes to display the following:
  - The Quotes list and details for the selected quote in the right pane or work area.
  - A list in the left pane in which you can select the related items for quotes.
2. Tap a quote in the Quotes list.

All details for the selected quote appear below the list in the work area.
3. Update an existing quote line item as follows:
  - a. Tap Line Items in the list in the left pane.

All the line items associated with the quote appear in the work area, and all details for the selected quote appear above the Line Items list in the work area.
  - b. Tap the line item that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new quote line item as follows:
  - a. Tap Line Items in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new line item in the fields that appear, and then save the record.

## Modifying Order Information for a Quote

Complete the following procedure to modify the order information for a quote.

### To modify the order information for a quote

1. Tap the Side Menu icon on the application banner, and then tap Quotes to display the following:
  - The Quotes list and details for the selected quote in the right pane or work area.
  - A list in the left pane in which you can select the related items for quotes.
2. Tap a quote in the Quotes list.

All details for the selected quote appear below the list in the work area.

3. Update an existing quote order as follows:
  - a. Tap Orders in the list in the left pane.

All the orders associated with the quote appear in the work area, and all details for the selected quote appear above the Orders list in the work area.
  - b. Tap the order that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new quote order as follows:
  - a. Tap Orders in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new order on the page that appears, and then save the record.

## Converting a Quote to an Order

When you create an order from a quote using the Auto Order link, an order record is automatically created for the quote using the data from the quote. For more information about creating orders from quotes, see *Siebel Order Management Guide*.

### To convert a quote to an order

1. Tap the Side Menu icon on the application banner, and then tap Quotes to display the following:
  - The Quotes list and details for the selected quote in the right pane or work area.
  - A list in the left pane in which you can select the related items for quotes.
2. Tap a quote in the Quotes list.

All details for the selected quote appear below the list in the work area.
3. Tap Orders in the list in the left pane.
4. Tap Auto Order to create an order from the quote.

## Modifying Quote Team Information for a Quote

Complete the following procedure to modify the quote team information for a quote.

### To modify the quote team information for a quote

1. Tap the Side Menu icon on the application banner, and then tap Quotes to display the following:
  - The Quotes list and details for the selected quote in the right pane or work area.
  - A list in the left pane in which you can select the related items for quotes.
2. Tap a quote in the Quotes list.

All details for the selected quote appear below the list in the work area.

3. Update an existing quote team as follows:
  - a. Tap Quote Team in the list in the left pane.  
All the team members associated with the quote appear in the work area, and all details for the selected quote appear above the Quote Team list in the work area.
  - b. Tap the team member that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You can update only the Primary check box. You must navigate away from the record to save your changes to it.
4. Add an existing person to the quote team as follows:
  - a. Tap Quote Team in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the person on the list that appears, and then tap OK.

## Managing Orders for Siebel Sales

An *order* is a commitment on the part of the customer to purchase products and services at a specific price. It can be generated from a quote or created directly by a sales person, call center agent, and sales administrator.

The following procedures related to orders and order management are included in this topic:

- ["Displaying Order Details"](#) on page 7-21
- ["Modifying Order Information"](#) on page 7-22
- ["Modifying Line Item Information for an Order"](#) on page 7-22

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

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### Displaying Order Details

You can display order details by using the Orders list.

#### To display order details

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Tap an order in the Orders list.  
All details for the selected order appear below the list in the work area.
3. To view the related items for the selected order, tap the following name in the list in the left pane:
  - **Line Items.** Shows the line item information for the order. For more information, see ["Modifying Line Item Information for an Order"](#) on page 7-22.

## Modifying Order Information

Complete the following procedure to modify order information.

### To modify order information

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Update an existing order as follows:
  - a. Tap an order in the Orders list.

All details for the selected order appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new order as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new order in the fields that appear, and then save the record.

## Modifying Line Item Information for an Order

Complete the following procedure to modify the line item information for an order.

### To modify the line item information for an order

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Tap an order in the Orders list.

All details for the selected order appear below the list in the work area.
3. Update an existing order line item as follows:
  - a. Tap Line Items in the list in the left pane.

All the line items associated with the order appear in the work area, and all details for the selected order appear above the Line Items list in the work area.
  - b. Tap the line item that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new order line item as follows:
  - a. Tap Line Items in the list in the left pane, and then tap the plus (+) icon in the work area.

- b. Enter the information for the new line item in the fields that appear, and then save the record.

## Managing Activities for Siebel Sales

An *activity* is a task that you perform for a contact, account, or opportunity.

The following procedures related to activities and activity management are included in this topic:

- ["Displaying Activity Details"](#) on page 7-23
- ["Modifying Activity Information"](#) on page 7-23
- ["Modifying Contact Information for an Activity"](#) on page 7-24
- ["Modifying Employee Information for an Activity"](#) on page 7-25

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

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### Displaying Activity Details

You can display activity details by using the Activities list.

#### To display activity details

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. To view the related items for the selected activity, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the activity. For more information, see ["Modifying Contact Information for an Activity"](#) on page 7-24.
  - **Employees.** Shows the employee information for the activity. For more information, see ["Modifying Employee Information for an Activity"](#) on page 7-25.

### Modifying Activity Information

Complete the following procedure to modify activity information.

#### To modify activity information

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.

2. Update an existing activity as follows:
  - a. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new activity as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity in the fields that appear, and then save the record.

## Modifying Contact Information for an Activity

Complete the following procedure to modify the contact information for an activity.

### To modify the contact information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. Update an existing activity contact as follows:
  - a. Tap Contacts in the list in the left pane.

All the contacts associated with the activity appear in the work area, and all details for the selected activity appear above the Contacts list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the activity as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap the OK.
5. Create a new activity contact as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new contact in the fields that appear, and then save the record.



## Modifying Employee Information for an Activity

Complete the following procedure to modify the employee information for an activity.

### To modify the employee information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. Update an existing activity employee as follows:
  - a. Tap Employees in the list in the left pane.

All the employees associated with the activity appear in the work area, and all details for the selected activity appear above the Employees list in the work area.
  - b. Tap the employee that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing employee to the activity as follows:
  - a. Tap Employees in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the employee on the list that appears, and then tap OK.



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# Using the Siebel Mobile Connected Application for Siebel Service

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

- [Managing Activities for Siebel Service](#)
- [Managing Service Requests for Siebel Service](#)
- [Managing Accounts for Siebel Service](#)
- [Managing Parts for Siebel Service](#)
- [Managing Orders for Siebel Service](#)
- [Managing Invoices for Siebel Service](#)
- [Managing Assets for Siebel Service](#)
- [Managing Shifts for Siebel Service](#)
- [Tasks Flows for Siebel Service](#)

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**Note:** The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is not configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see "[Inline Editing](#)" on page 4-7.

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## Managing Activities for Siebel Service

An *activity* is a task that you perform for a contact, account, or service request.

The following procedures related to activities and activity management are included in this topic:

- ["Displaying Activity Details"](#) on page 8-2
- ["Modifying Activity Information"](#) on page 8-3
- ["Modifying Contact Information for an Activity"](#) on page 8-4
- ["Verifying and Ordering Parts and Tools for an Activity"](#) on page 8-4
- ["Viewing Instruction Information for an Activity"](#) on page 8-5
- ["Viewing Step Information for an Activity"](#) on page 8-5
- ["Modifying Part Tracker Information for an Activity"](#) on page 8-6

- ["Modifying Time Tracker Information for an Activity"](#) on page 8-11
- ["Modifying Expense Tracker Information for an Activity"](#) on page 8-12
- ["Creating Invoices from Activities Using the Auto Invoice Link"](#) on page 8-13

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

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## Displaying Activity Details

You can display activity details by using the Activities list.

### To display activity details

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the activities list.

All details for the selected activity appear below the list in the work area.
3. To view the related items for the selected activity, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the activity. For more information, see ["Modifying Contact Information for an Activity"](#) on page 8-4.
  - **Recommended Parts and Tools.** Shows the items required to complete the activity. For more information, see ["Verifying and Ordering Parts and Tools for an Activity"](#) on page 8-4.
  - **Instructions.** Shows the instructions required to complete the activity. For more information, see ["Viewing Instruction Information for an Activity"](#) on page 8-5.
  - **Steps.** Shows the steps required to complete the activity. For more information, see the following:
    - ["Viewing Step Information for an Activity"](#) on page 8-5
    - ["Recording Step Completion for an Activity"](#) on page 8-6
  - **Part Tracker.** Shows the activity parts being tracked. For more information, see the following:
    - ["Modifying Part Tracker Information for an Activity"](#) on page 8-6
    - ["Removing a Serialized Part"](#) on page 8-7
    - ["Installing a Replacement Serialized Part"](#) on page 8-8
    - ["Modifying Activity Parts by Scanning Barcode Data"](#) on page 8-9
  - **Time Tracker.** Shows how activity time is being tracked. For more information, see ["Modifying Time Tracker Information for an Activity"](#) on page 8-11.

- **Expense Tracker.** Shows the activity expenses being tracked. For more information, see ["Modifying Expense Tracker Information for an Activity"](#) on page 8-12.
- **Invoices.** Shows the activity invoices. For more information, see the following:
  - ["Creating Invoices from Activities Using the Auto Invoice Link"](#) on page 8-13
  - ["Capturing the Electronic Signature for an Invoice"](#) on page 8-13
  - ["Viewing Invoice Information for an Activity"](#) on page 8-14
  - ["Printing Invoices Associated with an Activity"](#) on page 8-14

## Modifying Activity Information

Complete the following procedure to modify activity information.

### To modify activity information

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Update an existing activity as follows:
  - a. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new activity as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity in the fields that appear, and save the record.

The following table describes the fields.

Field Name	Description
SR #	Select a service request number to associate with the activity.
Account	Select an account to associate with the activity.
Activity #	Displays the read-only activity number.
Type	Select an activity type.
Description	Type a description of the activity.
Status	Select a status for the activity.
Symptom	Select a symptom to associate with the activity.
Priority	Select a priority for the activity.
Due	Select the due date and time for the activity.

Field Name	Description
Billable	Select this check box if the activity is billable. Otherwise deselect this check box.
Rate List	Select a rate list to associate with the activity.
Price List	Select a price list to associate with the activity.
Resolution	Select a resolution for the activity.
Comments	Type any necessary comment about the activity.

## Modifying Contact Information for an Activity

Complete the following procedure to modify the contact information for an activity.

### To modify the contact information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.
3. Update an existing activity contact as follows:
  - a. Tap Contacts in the list in the left pane.  
All the contacts associated with the activity appear in the work area, and all details for the selected activity above the Contacts list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the activity as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap the OK.

## Verifying and Ordering Parts and Tools for an Activity

Complete the following procedure to verify and order parts and tools for an activity. Before visiting a customer to complete an activity, you must verify that the required parts and tools are in your vehicle trunk and order any needed parts and tools.

### To verify and order parts and tools for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.

3. Tap Recommended Parts & Tools in the list in the left pane.

All the parts and tools associated with the activity appear in the work area, and all details for the selected activity appear above the Parts & Tools list in the work area.

4. To verify that the required parts and tools are in your vehicle trunk, tap Check Trunk in the work area.

The number of available parts and tools in your vehicle trunk appears.

5. Order a part or tool for the activity as follows:

- a. Choose the part or tool that you want to order in the work area.

- b. Tap Order Part in the work area.

If an order does not already exist for the part or tool, then an order for the part or tools is created.

- c. To display the order line items, tap Order number (#).

- d. To display the line item details, tap an order line item.

## Viewing Instruction Information for an Activity

Complete the following procedure to view the instruction information for an activity.

### To view the instruction information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

- The Activities list and details for the selected activity in the right pane or work area.

- A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.

3. Tap Instructions in the list in the left pane.

All the instructions associated with the activity appear in the work area, and all details for the selected activity appear above the Instructions list in the work area.

4. Tap the instruction that you want to view.

## Viewing Step Information for an Activity

Complete the following procedure to view the step information for an activity.

### To view the step information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

- The Activities list and details for the selected activity in the right pane or work area.

- A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.

3. Tap Steps in the list in the left pane.  
All the steps associated with the activity appear in the work area, and all details for the selected activity appear above the Steps list in the work area.
4. Tap the step that you want to view.

## Recording Step Completion for an Activity

Complete the following procedure to record step completion for an activity. You record step completion to keep track of your work progress on the activity. As you complete each activity step, you mark the step as done.

### To record step completion for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.
3. Record step completion as follows:
  - a. Tap Steps in the list in the left pane.  
All the steps associated with the activity appear in the work area, and all details for the selected activity appear above the Steps list in the work area.
  - b. Tap the step that you want to complete.
  - c. Select the Done check box to indicate completion of the step.
  - d. Enter any comments in the Comments field as required.
4. Repeat 3 for any other steps that are complete.

## Modifying Part Tracker Information for an Activity

Complete the following procedure to modify the part tracker information for an activity. You use part tracker to track part movements between locations.

### To modify the part tracker information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.
3. Update an existing activity part movement as follows:
  - a. Tap Part Tracker in the list in the left pane.  
All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the Part Tracker list in the work area.



- b. Tap the part that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new activity part movement as follows:
    - a. Tap Part Tracker in the list in the left pane, and then tap Move in the work area.
    - b. Enter the information for the new part movement in the fields that appear, and then save the record.

The following table describes the fields.

Field Name	Description
Product	Select the product that is associated with the part.
Part Number	The part number associated with the product.
Status	Select a status for the part.
Quantity	Type the quantity of the part.
Asset #	Select an asset number to associate with the part.
Comments	Type any necessary comment about the activity part movement.
From	Select the location from which you want to move the part.
To	Select the location to which you want to move the part.
Billable	Select this check box to indicate if the part movement is billable. Otherwise deselect this check box.

5. Tap Commit to generate the inventory transactions.

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**Note:** If you complete part tracker updates in offline mode, then the inventory transactions are generated when the mobile device is next synchronized with the Siebel Server.

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## Removing a Serialized Part

Complete the following procedure to remove a defective serialized part from service. After you complete this procedure, you install a replacement serialized part. For more information, see "[Installing a Replacement Serialized Part](#)" on page 8-8.

### To remove a serialized part

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.

3. Remove the serialized part as follows:
  - a. Tap Part Tracker in the list in the left pane.  
All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the Part Tracker list in the work area.
  - b. Tap Move in the work area.
  - c. Enter the information for the part movement in the fields that appear, and then save the record.

The following table describes the fields.

Field Name	Description
Product	Select the product that is associated with the part.
Status	Select a value of Defective.
Quantity	Type the quantity of the part.
Asset #	Select an asset number to associate with the part.
From	Select a value of Customer.
To	Select a value of Trunk.
Billable	Select this check box to indicate if the part movement is billable. Otherwise deselect this check box.

4. Tap Commit.

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**Note:** If you complete part tracker updates in offline mode, then the inventory transactions are created when the mobile device is synchronized with the Siebel Server.

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5. Tap RMA to create a return merchandise authorization for the part movement.

## Installing a Replacement Serialized Part

Complete the following procedure to install a replacement serialized part. Before you complete this procedure, you remove the defective serialized part from service. For more information, see "[Removing a Serialized Part](#)" on page 8-7.

### To install a replacement serialized part

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.
3. Install the replacement serialized part as follows:

- a. Tap Part Tracker in the list in the left pane.  
All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the Part Tracker list in the work area.
- b. Tap Move in the work area.
- c. Enter the information for the part movement in the fields that appear, and then save the record.

The following table describes the fields.

Field Name	Description
Product	Select the product that is associated with the part.
Status	Select a value of Good.
Quantity	Type the quantity of the part.
Asset #	Select an asset number to associate with the part.
From	Select a value of Service Order or Trunk.
To	Select a value of Customer.
Billable	Select this check box to indicate if the part movement is billable. Otherwise deselect this check box.

4. Tap Commit.

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**Note:** If you complete part tracker updates in offline mode, then the inventory transactions are created when the mobile device is synchronized with the Siebel Server.

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## Modifying Activity Parts by Scanning Barcode Data

You can use a barcode reader to update existing or add new parts for an activity by scanning the part's barcode data. For more information about barcodes in general and about how to set up the barcode interface for specific views and applets in Siebel CRM, see the chapter about barcodes in *Siebel Field Service Guide*.

### To modify activity parts by scanning barcode data

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.
3. Update an existing activity part by scanning the barcode data as follows:
  - a. Tap Part Tracker in the list in the left pane.  
All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the Part Tracker list in the work area.

The following barcode reader information appears above the activity details in the work area: a Barcode New icon, a Barcode Update icon, and a field with a drop-down list.

- b. Tap the Barcode Update icon.
- c. In the drop-down list next to the Barcode Update icon, select the type of data associated with the barcode (for example, select Asset Number Entry).
- d. Tap the part record to receive the barcode data.
- e. Scan the barcode.

The appropriate field (Asset #) in the selected part record is populated with the barcode data. If the field already has a value, then the barcode data replaces the value.

Accessibility users must enter data using the following keyboard shortcuts: Ctrl+\(Asset#) Ctrl+\. For example: Control\MASSET2Control\.

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**Note:** By scanning barcode data, you can update assets belonging to the same product only.

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4. Add a new activity part by scanning the part's barcode data as follows:

- a. Tap Part Tracker in the list in the left pane.

All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the list in the work area.

The following barcode reader information appears above the activity details in the work area: a Barcode New icon, a Barcode Update icon, and a field with a drop-down list.

- b. Tap the Barcode New icon.
- c. In the drop-down list next to the Barcode New icon, select the type of data associated with the barcode (for example, select Asset Number Entry).
- d. Scan the barcode for the part.

A new part tracker record is created, and the appropriate field (Asset #) in the new record is populated with the barcode data.

Accessibility users must enter data using the following keyboard shortcuts: Ctrl+\ (Asset#) Ctrl+\. For example: Control\MASSET1Control\.

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**Note:** By scanning barcode data, you can update assets belonging to the same product only.

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5. Enter other appropriate field values in the new record.

**Related Topics:**

["Running Predefined Queries in Siebel Mobile" on page 4-17](#)

["Modifying Records in Siebel Mobile" on page 4-9](#)

## Modifying Time Tracker Information for an Activity

Complete the following procedure to modify the time tracker information for an activity. Time tracker includes information about the time (for example, travel or labor time) that is associated with the activity. You can include this time in a customer invoice.

### To modify the time tracker information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.
3. Update an existing activity time as follows:
  - a. Tap Time Tracker in the list in the left pane.  
All the tracked times associated with the activity appear in the work area, and all details for the selected activity appear above the Time Tracker list in the work area.
  - b. Tap the time that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new activity time as follows:
  - a. Tap Time Tracker in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new time in the fields that appear, and then save the record.

The following table describes the fields.

Field Name	Description
Type	Select the type of time.
Rate	Select the rate for the time.
Date	Select the date of the time.
Start Time	Type the start time for the activity. This field is filled in with the current time, but you can change this time.
End Time	Type the end time for the activity. You can leave this field blank, close the form, and then tap End in the work area to record the current time in the End Time field.
Billable	Select this check box to indicate if the time is billable. Otherwise deselect this check box.

## Modifying Expense Tracker Information for an Activity

Complete the following procedure to modify the expense tracker information for an activity. Expense tracker includes information about the expenses that are incurred for the activity. You can include these expenses in a customer invoice.

### To modify the expense tracker information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.  
All details for the selected activity appear below the list in the work area.
3. Update an existing activity expense as follows:
  - a. Tap Expense Tracker in the list in the left pane.  
All the tracked expenses associated with the activity appear in the work area, and all details for the selected activity appear above the Expense Tracker list in the work area.
  - b. Tap the expense that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new activity expense as follows:
  - a. Tap Expense Tracker in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new expense in the fields that appear, and then save the record.  
The following table describes the fields.

Field Name	Description
Date	Displays the date of the expense.
Type	Select the type of expense.
Amount	Type the amount to expense.
Rate	Select a rate for the expense.
Billable	Select this check box to indicate if the expense is billable. Otherwise deselect this check box.
Comments	Type any necessary comment about the expense.

## Creating Invoices from Activities Using the Auto Invoice Link

When you create an invoice from an activity using the Auto Invoice link, an invoice record is automatically created for the activity using the data from the activity.

### To create an invoice from an activity using the Auto Invoice link

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area. Note that to create an invoice from this activity, then the Billable check box must be selected on the activity.
3. Tap Invoices in the list in the left pane.

All the invoices associated with the activity appear in the work area, and all details for the selected activity appear above the Invoices list in the work area.
4. Tap Auto Invoice to create an invoice from the activity.
5. Tap the Invoice # link to open the invoice and review the invoice line items.

## Capturing the Electronic Signature for an Invoice

After you create an invoice, you capture the signature of the contact for the invoice. You capture this signature to verify that the contact reviewed the invoice.

### To capture the electronic signature for an invoice

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. Tap Invoices in the list in the left pane.

All the invoices associated with the activity appear in the work area, and all details for the selected activity appear above the Invoices list in the work area.
4. Tap the invoice for which you want to capture the electronic signature.
5. Tap Sign.

Information about the invoice and about the contact for the invoice appears.
6. Capture the signature of the contact in the signature input box.
7. If you make a mistake when capturing the signature, tap Clear to clear the signature and start again.
8. Save the record when finished.

## Viewing Invoice Information for an Activity

Complete the following procedure to view the invoice information for an activity.

### To view the invoice information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. Tap Invoices in the list in the left pane.

All the invoices associated with the activity appear in the work area, and all details for the selected activity appear above the Invoices list in the work area.
4. Tap the invoice that you want to view.

All details for the selected invoice appear below the list in the work area.
5. Tap the Invoice # link to open the invoice and review the invoice line item details.

## Printing Invoices Associated with an Activity

Complete the following procedure to print an invoice associated with an activity.

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**Note:** The print invoice capability in the Siebel Mobile application for Siebel Service is built using third-party open source embedded JavaScript (<http://embeddedjs.com>) and uses MIT licensing. For more information, see "MIT License" on page 2-5.

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### To print an invoice associated with an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. Tap Invoices in the list in the left pane.

All the invoices associated with the activity appear in the work area, and all details for the selected activity appear above the Invoices list in the work area.
4. Tap the invoice that you want to print.

All details for the selected invoice appear below the list in the work area.
5. Tap the Invoice # link to open the invoice.

All the invoice line items associated with the invoice appear in the work area, and all details for the selected invoice appear above the list in the work area.



6. Tap Print Preview to preview the invoice details.
7. Tap Print to print the invoice.

## Managing Service Requests for Siebel Service

A *service request* is a customer request for service. It includes the activities associated with the request and information about the response to the request.

The following procedures related to service requests and service request management are included in this topic:

- ["Displaying Service Request Details"](#) on page 8-15
- ["Modifying Service Request Information"](#) on page 8-16
- ["Modifying Order Information for a Service Request"](#) on page 8-16
- ["Modifying Activity Information for a Service Request"](#) on page 8-17
- ["Creating Invoices from Service Requests Using the Auto Invoice Link"](#) on page 8-18

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

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### Displaying Service Request Details

You can display service request details by using the Service Reqs list.

#### To display service request details

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.  
All details for the selected service request appear below the list in the work area.
3. To view the related items for the selected service request, tap the following names in the list in the left pane:
  - **Orders.** Shows the order information for the service request. For more information, see ["Modifying Order Information for a Service Request"](#) on page 8-16.
  - **Activities.** Shows the activity information for the service request. For more information, see ["Modifying Activity Information for a Service Request"](#) on page 8-17.
  - **Invoices.** Shows the invoice information for the service request. For more information, see the following:
    - ["Creating Invoices from Service Requests Using the Auto Invoice Link"](#) on page 8-18

- ["Viewing Invoice Information for a Service Request"](#) on page 8-18
- ["Printing Invoices Associated with a Service Request"](#) on page 8-19

## Modifying Service Request Information

Complete the following procedure to modify service request information.

### To modify service request information

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Update an existing service request as follows:
  - a. Tap a service request in the Service Requests list.

All details for the selected service request appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new service request as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new service request in the fields that appear, and then save the record.

## Modifying Order Information for a Service Request

Complete the following procedure to modify the order information for a service request.

### To modify the order information for a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.

All details for the selected service request appear below the list in the work area.
3. Update an existing service request order as follows:
  - a. Tap Orders in the list in the left pane.

All the orders associated with the service request appear in the work area, and all details for the selected service request appear above the Orders list in the work area.

- b. Tap the order that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new service request order as follows:
    - a. Tap Orders in the list in the left pane, and then tap the plus (+) icon in the work area.
    - b. Enter the information for the new order in the fields that appear, and then save the record.

## Modifying Activity Information for a Service Request

Complete the following procedure to modify the activity information for a service request. You can add a specific activity to a service request that is associated with an account. You can also add a miscellaneous activity, such as depositing funds at a bank or obtaining service work on a truck, to a service request that is not associated with an account.

### To modify the activity information for a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.  
All details for the selected service request appear below the list in the work area.
3. Update an existing service request activity as follows:
  - a. Tap Activities in the list in the left pane.  
All the activities associated with the service request appear in the work area, and all details for the selected service request appear above the Activities list in the work area.
  - b. Tap the activity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new service request activity as follows:
  - a. Tap Activities in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity in the fields that appear, and then save the record.

## Creating Invoices from Service Requests Using the Auto Invoice Link

When you create an invoice from a service request using the Auto Invoice link, an invoice record is automatically created for the service request using the data from the service request.

### To create an invoice from a service request using the Auto Invoice link

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.

All details for the selected service request appear below the list in the work area. Note that to create an invoice from this service request, the Billable check box must be selected on the service request.
3. Tap Invoices in the list in the left pane.

All the invoices associated with the service request appear in the work area, and all details for the selected service request appear above the Invoices list in the work area.
4. Tap Auto Invoice to create an invoice from the service request.
5. Tap the Invoice # link to open the invoice and review the invoice line items.

## Viewing Invoice Information for a Service Request

Complete the following procedure to view the invoice information for a service request.

### To view the invoice information for a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.

All details for the selected service request appear below the list in the work area.
3. Tap Invoices in the list in the left pane.

All the invoices associated with the service request appear in the work area, and all details for the selected service request appear above the Invoices list in the work area.
4. Tap the invoice that you want to view.
5. Tap the Invoice # link to open the invoice and review the invoice line item details.

## Printing Invoices Associated with a Service Request

Complete the following procedure to print an invoice associated with a service request.

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**Note:** The print invoice capability in the Siebel Mobile application for Siebel Service is built using third-party open source embedded JavaScript (<http://embeddedjs.com>) and uses MIT licensing. For more information, see "MIT License" on page 2-5.

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### To print an invoice associated with a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.

All details for the selected service request appear below the list in the work area.
3. Tap Invoices in the list in the left pane.

All the invoices associated with the service request appear in the work area, and all details for the selected service request appear above the Invoices list in the work area.
4. Tap the invoice that you want to print.
5. Tap the Invoice # link to open the invoice.

All the invoice line items associated with the invoice appear in the work area, and all details for the selected invoice appear above the Invoice Line Items list in the work area.
6. Tap Print Preview to preview the invoice details.
7. Tap Print to print the invoice.

## Managing Accounts for Siebel Service

An *account* is a company or individual with whom your company conducts business. It represents the relationship between your company and that company or individual. You can use the Account Details screen as the primary navigation tool for your customer interactions.

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

- "Displaying Account Details" on page 8-20
- "Viewing Contact Information for an Account" on page 8-20
- "Modifying Service Request Information for an Account" on page 8-21
- "Viewing Asset Information for an Account" on page 8-21
- "Viewing Entitlement Information for an Account" on page 8-22

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

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## Displaying Account Details

You can display account details by using the Accounts list.

### To display account details

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. To view the related items for the selected account, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the account. For more information, see "[Viewing Contact Information for an Account](#)" on page 8-20.
  - **Service Requests.** Shows the service request information for the account. For more information, see "[Modifying Service Request Information for an Account](#)" on page 8-21.
  - **Assets.** Shows the asset information for the account. For more information, see "[Viewing Asset Information for an Account](#)" on page 8-21.
  - **Entitlements.** Shows the entitlement information for the account. For more information, see "[Viewing Entitlement Information for an Account](#)" on page 8-22.

## Viewing Contact Information for an Account

Complete the following procedure to view the contact information for an account.

### To view the contact information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Tap Contacts in the list in the left pane.

All the contacts associated with the account appear in the work area, and all details for the selected account appear above the Contacts list in the work area.
4. Tap the contact that you want to view.

## Modifying Service Request Information for an Account

Complete the following procedure to modify the service request information for an account.

### To modify the service request information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Update an existing account service request as follows:
  - a. Tap Service Requests in the list in the left pane.

All the service requests associated with the account appear in the work area, and all details for the selected account appear above the Service Requests list in the work area.
  - b. Tap the service request that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account service request as follows:
  - a. Tap Service Requests in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new service request in the fields that appear, and then save the record.

## Viewing Asset Information for an Account

Complete the following procedure to view the asset information for an account.

### To view the asset information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Tap Assets in the list in the left pane.

All the assets associated with the account appear in the work area, and all details for the selected account appear above the Assets list in the work area.
4. Tap the asset that you want to view.

## Viewing Entitlement Information for an Account

Complete the following procedure to view the entitlement information for an account.

### To view the entitlement information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

All details for the selected account appear below the list in the work area.
3. Tap Entitlements in the list in the left pane.

All the entitlements associated with the account appear in the work area, and all details for the selected account appear above the Entitlements list in the work area.
4. Tap the entitlement that you want to view.

## Managing Parts for Siebel Service

A *part* is an item that you sell to the customer.

The following procedures related to parts and part management are included in this topic:

- ["Displaying Part Details"](#) on page 8-22
- ["Viewing Availability Information for a Part"](#) on page 8-23
- ["Viewing Substitute Information for a Part"](#) on page 8-23

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

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## Displaying Part Details

You can display part details by using the Product Inventory list.

### To display part details

1. Tap the Side Menu icon on the application banner, and then tap Browser to display the following:
  - The Product Inventory list and details for the selected part in the right pane or work area.
  - A list in the left pane in which you can select the related items for product inventory.
2. Tap a part in the Product Inventory list.
3. To view the related items for the selected part, tap the following names in the list in the left pane:
  - **Availability.** Shows the availability information for the part. For more information, see ["Viewing Availability Information for a Part"](#) on page 8-23.



- **Substitutes.** Shows the substitute information for the part. For more information, see "[Viewing Substitute Information for a Part](#)" on page 8-23.

## Viewing Availability Information for a Part

Complete the following procedure to view the availability information for a part.

### To view the availability information for a part

1. Tap the Side Menu icon on the application banner, and then tap Browser to display the following:
  - The Product Inventory list and details for the selected part in the right pane or work area.
  - A list in the left pane in which you can select the related items for product inventory.
2. Tap a part in the Product Inventory list.
3. Tap Availability in the left pane to view the availability for the selected part.

All the inventory level availability details associated with the part appear in the work area, and all details for the selected part appear above the Inventory Level list in the work area.

## Viewing Substitute Information for a Part

Complete the following procedure to view the substitute information for a part.

### To view the substitute information for a part

1. Tap the Side Menu icon on the application banner, and then tap Browser to display the following:
  - The Product Inventory list and details for the selected part in the right pane or work area.
  - A list in the left pane in which you can select the related items for product inventory.
2. Tap a part in the Product Inventory list.
3. Tap Substitutes in the left pane to view the substitute availability for the selected part.

All the substitute availability details appear in the work area, and all details for the selected part appear above the Substitutes list in the work area.

## Managing Orders for Siebel Service

An *order* is a commitment on the part of the customer to purchase products and services at a specific price. It can be generated from a quote or created directly by a sales person, call center agent, and field technician.

The following procedures related to orders and order management are included in this topic:

- "[Displaying Order Details](#)" on page 8-24
- "[Modifying Order Information](#)" on page 8-24
- "[Modifying Line Item Information for an Order](#)" on page 8-25

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

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## Displaying Order Details

You can display order details by using the Orders list.

### To display order details

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Tap an order in the Orders list.

All details for the selected order appear below the list in the work area.
3. To view the related items for the selected order, tap the following name in the list in the left pane:
  - **Line Items.** Shows the line item information for the order. For more information, see "[Modifying Line Item Information for an Order](#)" on page 8-25.

## Modifying Order Information

Complete the following procedure to modify order information.

### To modify order information

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Update an existing order as follows:
  - a. Tap an order in the Orders list.

All details for the selected order appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

You cannot create a new order from the Orders view. You can create a new order by navigating to one of the following views:

- Activities, then Recommended Parts and Tools. For more information, see "[Verifying and Ordering Parts and Tools for an Activity](#)" on page 8-4.
- Activities, then Part Tracker (and using the RMA link). For more information, see "[Removing a Serialized Part](#)" on page 8-7.

## Modifying Line Item Information for an Order

Complete the following procedure to modify the line item information for an order.

### To modify the line item information for an order

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:
  - The Orders list and details for the selected order in the right pane or work area.
  - A list in the left pane in which you can select the related items for orders.
2. Tap an order in the Orders list.  
All details for the selected order appear below the list in the work area.
3. Update an existing order line item as follows:
  - a. Tap Line Items in the list in the left pane.  
All the line items associated with the order appear in the work area, and all details for the selected order appear above the Line Items list in the work area.
  - b. Tap the line item that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new order line item as follows:
  - a. Tap Line Items in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new line item in the fields that appear, and then save the record.

## Managing Invoices for Siebel Service

An *invoice* is a bill to the customer for parts, labor, and other expenses that you incur.

The following procedures related to invoices and invoice management are included in this topic:

- ["Displaying Invoice Details"](#) on page 8-25
- ["Viewing Line Item Information for an Invoice"](#) on page 8-26
- ["Printing Invoices"](#) on page 8-26

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

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### Displaying Invoice Details

You can display invoice details by using the Invoices list.

#### To display invoice details

1. Tap the Side Menu icon on the application banner, and then tap Invoices to display the following:

- The Invoices list and details for the selected invoice in the right pane or work area.
  - A list in the left pane in which you can select the related items for invoices.
2. Tap an invoice in the Invoices list.  
All details for the selected invoice appear below the list in the work area.
  3. To view the related items for the selected invoice, tap the following name in the list in the left pane:
    - **Invoice Line Items.** Shows the line item information for the invoice. For more information, see the following topics:
      - ["Viewing Line Item Information for an Invoice"](#) on page 8-26
      - ["Printing Invoices"](#) on page 8-26

## Viewing Line Item Information for an Invoice

Complete the following procedure to view the line item information for an invoice.

### To view the line item information for an invoice

1. Tap the Side Menu icon on the application banner, and then tap Invoices to display the following:
  - The Invoices list and details for the selected invoice in the right pane or work area.
  - A list in the left pane in which you can select the related items for invoices.
2. Tap an invoice in the Invoices list.  
All details for the selected invoice appear below the list in the work area.
3. Tap Invoice Line Items in the list in the left pane.  
All the invoice line items associated with the invoice appear in the work area, and all details for the selected invoice appear above the Invoice Line Items list in the work area.
4. Tap an invoice line item to view the details for that line item.

## Printing Invoices

Complete the following procedure to print an invoice.

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**Note:** The print invoice capability in the Siebel Mobile application for Siebel Service is built using third-party open source embedded JavaScript (<http://embeddedjs.com>) and uses MIT licensing. For more information, see ["MIT License"](#) on page 2-5.

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### To print an invoice

1. Tap the Side Menu icon on the application banner, and then tap Invoices to display the following:
  - The Invoices list and details for the selected invoice in the right pane or work area.
  - A list in the left pane in which you can select the related items for invoices.

2. Tap an invoice in the Invoices list.  
All details for the selected invoice appear below the list in the work area.
3. Tap Invoice Line Items in the list in the left pane.  
All the invoice line items associated with the invoice appear in the work area, and all details for the selected invoice appear above the Invoice Line Items list in the work area.
4. Tap Print Preview to preview the invoice details.
5. Tap Print to print the invoice.

## Managing Assets for Siebel Service

An *asset* is property or an item of value that your company owns.

The following procedures related to assets and asset management are included in this topic:

- ["Displaying Asset Details"](#) on page 8-27
- ["Viewing Measurement Information for an Asset"](#) on page 8-28
- ["Viewing Warranty Information for an Asset"](#) on page 8-28
- ["Viewing Entitlement Information for an Asset"](#) on page 8-29 10

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

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### Displaying Asset Details

You can display asset details by using the Assets list.

#### To display asset details

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:
  - The Assets list and details for the selected asset in the right pane or work area.
  - A list in the left pane in which you can select the related items for assets.
2. Tap an asset in the Assets list.  
All details for the selected asset appear below the list in the work area.
3. To view the related items for the selected asset, tap the following names in the list in the left pane:
  - **Measurements.** Shows the measurement information for the asset. For more information, see the following:
    - ["Viewing Measurement Information for an Asset"](#) on page 8-28
    - ["Capturing a Reading for an Asset"](#) on page 8-28
  - **Warranty.** Shows the warranty information for the asset. For more information, see ["Viewing Warranty Information for an Asset"](#) on page 8-28.
  - **Entitlements.** Shows the entitlement information for the asset. For more information, see ["Viewing Entitlement Information for an Asset"](#) on page 8-29.

## Viewing Measurement Information for an Asset

Complete the following procedure to view the measurement information for an asset. You might view measurement information to record readings for utility meters or to measure hydraulic pressure.

### To view the measurement information for an asset

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:
  - The Assets list and details for the selected asset in the right pane or work area.
  - A list in the left pane in which you can select the related items for assets.
2. Tap an asset in the Assets list.

All details for the selected asset appear below the list in the work area.
3. Tap Measurements in the list in the left pane.

All the measurements associated with the asset appear in the work area, and all details for the selected asset appear above the Asset Measurements list in the work area.
4. Tap the asset measurement that you want to view.

## Capturing a Reading for an Asset

For tasks such as taking a utility meter reading or measuring hydraulic pressure, you must record an asset reading.

### To capture a reading for an asset

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:
  - The Assets list and details for the selected asset in the right pane or work area.
  - A list in the left pane in which you can select the related items for assets.
2. Tap an asset in the Assets list.

All details for the selected asset appear below the list in the work area.
3. Capture a new asset reading as follows:
  - a. Tap Measurements in the list in the left pane.

All the measurements associated with the asset appear in the work area, and all details for the selected asset appear above the Asset Measurements list in the work area.
  - b. Tap a measurement, and then tap the plus (+) icon in the work area to capture a new reading.
  - c. Enter the information for the new reading in the fields that appear, and then save the record.

## Viewing Warranty Information for an Asset

Complete the following procedure to view the warranty information for an asset.

**To view the warranty information for an asset**

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:
  - The Assets list and details for the selected asset in the right pane or work area.
  - A list in the left pane in which you can select the related items for assets.
2. Tap an asset in the Assets list.  
All details for the selected asset appear below the list in the work area.
3. Tap Warranty in the list in the left pane.  
All the warranties associated with the asset appear in the work area, and all details for the selected asset appear above the Warranties list in the work area.
4. Tap the warranty that you want to view.

**Viewing Entitlement Information for an Asset**

Complete the following procedure to view the entitlement information for an asset.

**To view the entitlement information for an asset**

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:
  - The Assets list and details for the selected asset in the right pane or work area.
  - A list in the left pane in which you can select the related items for assets.
2. Tap an asset in the Assets list.  
All details for the selected asset appear below the list in the work area.
3. Tap Entitlements in the list in the left pane.  
All the entitlements associated with the asset appear in the work area, and all details for the selected asset appear above the Entitlements list in the work area.
4. Tap the entitlement that you want to view.

**Managing Shifts for Siebel Service**

A *shift* is an established time interval in which employees perform work.

The following procedures related to shifts and shift management are included in this topic:

- "Displaying Shift Details" on page 8-30
- "Starting and Ending a Shift" on page 8-30
- "Starting and Ending a Break" on page 8-30
- "Starting or Ending a Period of Unavailability" on page 8-31

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

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## Displaying Shift Details

You can display shift details by using the Shifts list. You can update shift information, including breaks and periods of unavailability (POUs), only if you use Siebel Real-time Scheduler Version 2.1 or later as your scheduling engine and Siebel Field Service Integration to Oracle Real-time Scheduler Version 2.1 or later integration pack for the integration.

### To display shift details

1. Tap the Side Menu icon on the application banner, and then tap Shifts to display the following:
  - The Shift list and details for the selected shift in the right pane or work area.
  - A list in the left pane in which you can select the related items for shifts.
2. Tap a shift in the Shifts list.

All details for the selected shift appear below the list in the work area.
3. To view the related items for the selected shift, tap the following names in the list in the left pane:
  - **Breaks.** Shows the break information for the shift. For more information, and ["Starting and Ending a Break"](#) on page 8-30.
  - **POUs.** Shows the period of unavailability (POU) information for the shift. For more information, see ["Starting or Ending a Period of Unavailability"](#) on page 8-31.

## Starting and Ending a Shift

Complete the following procedure to start and end a shift.

### To start and end a shift

1. Tap the Side Menu icon on the application banner, and then tap Shifts to display the following:
  - The Shift list and details for the selected shift in the right pane or work area.
  - A list in the left pane in which you can select the related items for shifts.
2. Tap a shift in the Shifts list.

All details for the selected shift appear below the list in the work area.
3. Tap Start in the work area when you start the shift to record your start time and start date.
4. Tap Complete in the work area when you end the shift to record your end time.

## Starting and Ending a Break

Complete the following procedure to start and end a break.

### To start and end a break

1. Tap the Side Menu icon on the application banner, and then tap Shifts to display the following:
  - The Shift list and details for the selected shift in the right pane or work area.
  - A list in the left pane in which you can select the related items for shifts.



2. Tap a shift in the Shifts list.  
All details for the selected shift appear below the list in the work area.
3. Tap Breaks in the list in the left pane.  
All the breaks associated with the shift appear in the work area, and all details for the selected shift appear above the Break list in the work area.
4. Tap the break that you want to start or end.
5. Tap Start when you start the break to record your start time and start date.
6. Tap Complete when you end the break to record your end time.

## Starting or Ending a Period of Unavailability

Complete the following procedure to start or end a period of unavailability (POU) for a shift.

### To start or end a period of unavailability

1. Tap the Side Menu icon on the application banner, and then tap Shifts to display the following:
  - The Shift list and details for the selected shift in the right pane or work area.
  - A list in the left pane in which you can select the related items for shifts.
2. Tap a shift in the Shifts list.  
All details for the selected shift appear below the list in the work area.
3. Tap POUs in the list in the left pane.  
All the POUs associated with the shift appear in the work area, and all details for the selected shift appear above the POUs list in the work area.
4. Tap the POU that you want to start or end.
5. Tap the Status field and update the field value.
6. Save the record when finished.

## Tasks Flows for Siebel Service

The Siebel Service task flows that field representatives typically carry out are divided into the following areas:

- ["Starting the Day"](#) on page 8-31
- ["Preparing for Customer Visits"](#) on page 8-32
- ["Performing Activities for Customer Visits"](#) on page 8-32
- ["Closing Customer Visits"](#) on page 8-33
- ["Performing Miscellaneous Tasks for Siebel Service"](#) on page 8-33

### Starting the Day

Field representatives typically perform the following tasks at the start of the day:

- Review the daily schedule.
- Review the route for the day.

For more information, see ["Displaying Location Details in Siebel Mobile"](#) on page 4-16.

- Review the notifications list.

For more information, see ["Reviewing Notification Messages in Siebel Mobile"](#) on page 4-11.

## Preparing for Customer Visits

To prepare for a customer visit, perform the following tasks:

- Review the details about the activities that are assigned to you for the day. After you review the activities, you can accept or decline them.

For more information, see ["Displaying Activity Details"](#) on page 8-2.

- Review the recommended parts and tools to make sure that you have all items that you need to complete the activity. If required, order any parts or tools that you need for future activities.

For information, see ["Verifying and Ordering Parts and Tools for an Activity"](#) on page 8-4.

- Review the instructions for the activity.

For information, see ["Viewing Instruction Information for an Activity"](#) on page 8-5.

- Review the steps needed to complete the activity.

For information, see ["Viewing Step Information for an Activity"](#) on page 8-5.

- Review the service requests for the account so that you are aware of the customer's service history.

For information, see ["Modifying Service Request Information for an Account"](#) on page 8-21.

- Tap Map to display the route from your current location to the customer site.

For more information, see ["Displaying Activity Details"](#) on page 8-2.

- Select an En Route value in the Details Menu of the activity when you are traveling to the location of the activity.

For more information, see ["Displaying Activity Details"](#) on page 8-2.

- Select an Arrive value in the Details Menu of the activity when you arrive at the location of the activity.

For more information, see ["Displaying Activity Details"](#) on page 8-2.

## Performing Activities for Customer Visits

To perform the activities for a customer visit, complete the following tasks:

- Record readings.

For more information, see ["Viewing Measurement Information for an Asset"](#) on page 8-28.

- Install nonserialized parts.

For more information, see ["Modifying Part Tracker Information for an Activity"](#) on page 8-6.

- Remove serialized parts.  
For more information, see ["Removing a Serialized Part"](#) on page 8-7.
- Install replacement serialized parts.  
For more information, see ["Installing a Replacement Serialized Part"](#) on page 8-8.

## Closing Customer Visits

To close a customer visit, complete the following tasks:

- Make sure that all steps in the activity are complete.  
For more information, see ["Recording Step Completion for an Activity"](#) on page 8-6.
- Record the time that you needed to complete the activity.  
For more information, see ["Modifying Time Tracker Information for an Activity"](#) on page 8-11.
- Record any expenses that you incurred to complete the activity.  
For more information, see ["Modifying Expense Tracker Information for an Activity"](#) on page 8-12.
- Create an invoice for the activity.  
For more information, see ["Creating Invoices from Activities Using the Auto Invoice Link"](#) on page 8-13.
- Capture the signature of the contact for an invoice.  
For more information, see ["Capturing the Electronic Signature for an Invoice"](#) on page 8-13.
- Select a Finish value in the Details Menu of the activity after you complete the work for the activity.  
For more information, see ["Displaying Activity Details"](#) on page 8-2.

## Performing Miscellaneous Tasks for Siebel Service

Field representatives typically perform the following tasks:

- Create a service request for an issue that you encounter at the account site after you review the asset for the account and review any warranties and entitlements that are associated with that asset.  
For more information, see the following:
  - ["Viewing Asset Information for an Account"](#) on page 8-21
  - ["Modifying Service Request Information for an Account"](#) on page 8-21
  - ["Viewing Warranty Information for an Asset"](#) on page 8-28
  - ["Viewing Entitlement Information for an Asset"](#) on page 8-29
- Create a sales order for a service request.  
For more information, see the following:
  - ["Modifying Order Information for a Service Request"](#) on page 8-16
  - ["Modifying Line Item Information for an Order"](#) on page 8-25

- Add an activity to a service request.  
For more information, see the following:
  - ["Modifying Activity Information"](#) on page 8-3
  - ["Modifying Activity Information for a Service Request"](#) on page 8-17
- Verify that the product inventory quantity in the vehicle trunk matches the available product inventory.  
For information, see ["Viewing Availability Information for a Part"](#) on page 8-23.
- Update shift, break, and period of unavailability (POU) information.  
For more information, see the following:
  - ["Starting and Ending a Shift"](#) on page 8-30
  - ["Starting and Ending a Break"](#) on page 8-30
  - ["Starting or Ending a Period of Unavailability"](#) on page 8-31

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## Using the Siebel Mobile Connected Application for Siebel Finance

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

- [Using the Home Page for Siebel Finance](#)
- [Managing Accounts for Siebel Finance](#)
- [Managing Contacts for Siebel Finance](#)
- [Managing Financial Applications for Siebel Finance](#)
- [Managing Opportunities for Siebel Finance](#)
- [Managing Households for Siebel Finance](#)
- [Managing Financial Accounts for Siebel Finance](#)
- [Managing Activities for Siebel Finance](#)
- [Managing Leads for Siebel Finance](#)
- [Managing Service Requests for Siebel Finance](#)

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**Note:** The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is not configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see "[Inline Editing](#)" on page 4-7.

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### Using the Home Page for Siebel Finance

The following procedures related to using the Siebel Mobile application for Siebel Finance home page are included in this topic:

- ["Scheduling and Viewing Activities on the Home Page"](#) on page 9-2
- ["Accessing New Records From the Home Page"](#) on page 9-2
- ["Reviewing Charts on the Home Page"](#) on page 9-2
- ["Reviewing Opportunities From the Home Page"](#) on page 9-3

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

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## Scheduling and Viewing Activities on the Home Page

On the home page, you can schedule and view activities in the calendar. For more information about using the calendar to schedule and view activities, see *Siebel Fundamentals for Siebel Open UI*.

## Accessing New Records From the Home Page

From the home page, you can quickly access the following types of recently created records: applications, leads, items needing approval, and opportunities. After you access the new records for one type, you can navigate back to the home page to access the new records for a different type.

### To access new records from the home page

1. Tap the Side Menu icon on the application banner, and then tap Home to display the home page.
2. Tap in the tile containing the graphic and link for the type of new records that you want to access.  
The tile is highlighted.
3. Tap the link under the graphic in the tile, and note the following:
  - If you tap the Open Applications link, a list of financial applications associated with your user ID appears.
  - If you tap the New Leads link, a list of new leads appears.
  - If you tap the Approvals link, any items that need your approval appear in the inbox. For more information about approving items in the inbox and about the inbox in general, see *Siebel Applications Administration Guide*.
  - If you tap the New Opportunities link, a list of new opportunities appears.

## Reviewing Charts on the Home Page

On the home page, you can review the following charts:

- **Sales Pipeline Phases.** For each sales phase associated with opportunities, this chart shows its percent of the total revenue associated with all opportunities for which the date in the Close Date field is 90 days after the current date.

The sales phases that appear in this chart are equivalent to the sales stages for opportunities. The sales methods for opportunities determine the sales stages for those opportunities.

- **Number of Opportunities by Product.** For each product, this chart shows the number of opportunities with an Open value in the Sales Stage field.

### To review charts on the home page

- Tap the Side Menu icon on the application banner, and then tap Home Page to display the home page.

The charts appear on the home page.

## Reviewing Opportunities From the Home Page

From the home page, you can review all opportunities.

### To review opportunities from the home page

1. Tap the Side Menu icon on the application banner, and then tap Home to display the home page.

An applet containing tiles of opportunity records appears. In the opportunity tiles, the speedometers denote the win-probabilities, and available fields include: sales stage, account, revenue, and close date.

2. To see additional details about an opportunity, tap the name of the opportunity at the top of its tile.
3. To return to the home page, repeat Step 1.

## Managing Accounts for Siebel Finance

An *account* is a company or individual with whom your company conducts business. It represents the relationship between your company and that company or individual. You can use the Account Details screen as the primary navigation tool for your customer interactions.

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

- ["Displaying Account Details"](#) on page 9-4
- ["Performing Needs Analysis for Accounts"](#) on page 9-5
- ["Modifying Account Information"](#) on page 9-6
- ["Modifying Contact Information for an Account"](#) on page 9-6
- ["Modifying Opportunity Information for an Account"](#) on page 9-7
- ["Modifying Address Information for an Account"](#) on page 9-8
- ["Modifying Activity Information for an Account"](#) on page 9-8
- ["Modifying Account Team Information for an Account"](#) on page 9-9
- ["Viewing Financial Account Information for an Account"](#) on page 9-9
- ["Viewing Recommendation Information for an Account"](#) on page 9-10
- ["Managing Application Information for an Account"](#) on page 9-12

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

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## Displaying Account Details

You can display account details by using the Accounts list.

### To display account details

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.
3. To view the related items for the selected account, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the account. For more information, see "[Modifying Contact Information for an Account](#)" on page 9-6.
  - **Opportunities.** Shows the opportunity information for the account. For more information, see "[Modifying Opportunity Information for an Account](#)" on page 9-7.
  - **Addresses.** Shows the address information for the account. For more information, see "[Modifying Address Information for an Account](#)" on page 9-8.
  - **Activities.** Shows the activity information for the account. For more information, see "[Modifying Activity Information for an Account](#)" on page 9-8.
  - **Account Team.** Shows the account team information for the account. For more information, see "[Modifying Account Team Information for an Account](#)" on page 9-9.
  - **Financial Accounts.** Shows the financial account information for the account. For more information, see "[Viewing Financial Account Information for an Account](#)" on page 9-9.
  - **Recommendations.** Shows the product recommendations for the account as recorded by an Oracle Policy Automation (OPA) needs analysis. For more information, see the following topics:
    - "[Performing Needs Analysis for Accounts](#)" on page 9-5
    - "[Viewing Recommendation Information for an Account](#)" on page 9-10
  - **Applications.** Shows the application information for products for the account. For more information, see "[Managing Application Information for an Account](#)" on page 9-12.
4. In the Accounts List, tap the name of an account in the Account field.
5. In the Account 360 View that appears, complete the following steps:
  - a. In the account form applet, review additional details about the account.

Some of the information in this form comes from fields in the non-mobile application for Siebel Finance.
  - b. In the Timeline applet, review a timeline of the activities that are associated with the account.

In the timeline, the icons denote the activity types, and the dates and times denote the ending dates and times of the activities.



You can tap Activities in the left pane to view additional details about the activities in the timeline and about any other activities for the account, and then tap Account 360 View in the left pane to return to the Account 360 View.

- c. In the applet that contains tiles of opportunity records, review the opportunities associated with the account.

In the opportunity tiles, the speedometers denote the win-probabilities, and available fields include: sales stage, account, revenue, and close date.

You can tap Opportunities in the left pane to view additional details about the opportunities in the tiles and about any other opportunities for the account, and then tap Account 360 View in the left pane to return to the Account 360 View.

- d. In the Needs Analysis applet, conduct an OPA needs analysis and initiate an application capture process for a product by completing the following steps in the following order:
  - Start the needs analysis as shown in ["Performing Needs Analysis for Accounts"](#) on page 9-5.
  - Review product recommendations for the account as shown in ["Viewing Recommendation Information for an Account"](#) on page 9-10.
  - Start the application capture process for a product and then save or submit the application as shown in ["Applying for Products for an Account"](#) on page 9-10.
  - Track applications for products, resume existing applications, and sign completed applications as shown in ["Managing Application Information for an Account"](#) on page 9-12.

## Performing Needs Analysis for Accounts

You perform a needs analysis for an account to record information about the account. However, you do not automatically create a financial application when you perform a needs analysis.

### To perform a needs analysis for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap the name of an account in the Accounts list.
3. In the Account 360 View that appears, complete the following steps:
  - a. In the Needs Analysis applet, select a type of needs analysis.  
For example, select Savings.
  - b. Tap Start New.

Doing this initiates the needs analysis interview from OPA for the particular needs analysis selected in Step a.

The needs analysis interview consists of a series of views and questions. The composition and structure of the needs analysis interview varies according to

the OPA Rule Base set up for your implementation of the selected type of needs analysis.

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**Note:** For information about integrating Oracle Policy Automation (OPA) for Siebel business applications, which includes creating and deploying rule base definitions in OPA, see *Siebel eService Administration Guide for Siebel Open UI*. For information about the OPA-specific workflows for Siebel Finance, see [Chapter 10, "Oracle Policy Automation Integration Workflows for Siebel Finance."](#) The sample Oracle Policy Automation rule base that is shipped with the product illustrates the capabilities of the integration between Oracle Policy Automation and Siebel Mobile.

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After completing the needs analysis interview, the Recommendations screen appears. For more information, see "[Viewing Recommendation Information for an Account](#)" on page 9-10 and "[Applying for Products for an Account](#)" on page 9-10.

## Modifying Account Information

Complete the following procedure to modify account information.

### To modify account information

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Update an existing account as follows:
  - a. Tap an account in the Accounts list.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new account as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new account on the form that appears, and then save the record.

## Modifying Contact Information for an Account

Complete the following procedure to modify the contact information for an account.

### To modify the contact information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.
3. Update an existing account contact as follows:
  - a. Tap Contacts in the list in the left pane.  
All contacts associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the account as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap OK.
5. Create a new account contact as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new contact on the form that appears, and then save the record.

## Modifying Opportunity Information for an Account

Complete the following procedure to modify the opportunity information for an account.

### To modify the opportunity information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.
3. Update an existing account opportunity as follows:
  - a. Tap Opportunities in the list in the left pane.  
All opportunities associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the opportunity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account opportunity as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new opportunity on the form that appears, and then save the record.

## Modifying Address Information for an Account

Complete the following procedure to modify the address information for an account.

### To modify the address information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.
3. Update an existing account address as follows:
  - a. Tap Addresses in the list in the left pane.

All addresses associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing address to the account as follows:
  - a. Tap Addresses in the list in the left pane, then tap the plus (+) icon in the work area.
  - b. Choose the Address on the list that appears, and then tap OK.
5. Create a new account address as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new address on the form that appears, and then save the record.

## Modifying Activity Information for an Account

Complete the following procedure to modify the activity information for an account.

### To modify the activity information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.
3. Update an existing account activity as follows:
  - a. Tap Activities in the list in the left pane.

All activities associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the activity that you want to update.

- c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new account activity as follows:
  - a. Tap Activities in the list in the left pane, then tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity on the form that appears, and then save the record.

## Modifying Account Team Information for an Account

Complete the following procedure to modify the account team information for an account.

### To modify the account team information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.
3. Update an existing account team as follows:
  - a. Tap Account Team in the list in the left pane.  
All account teams associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
  - b. Tap the team member that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing person to the account team as follows:
  - a. Tap Account Team in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the person on the list that appears, and then tap OK.

## Viewing Financial Account Information for an Account

Complete the following procedure to view the financial account information for an account. You cannot modify financial account information for an account.

### To view the financial account information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

3. Tap Financial Accounts in the list in the left pane.  
All financial accounts associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.
4. Tap the financial account that you want to view.

## Viewing Recommendation Information for an Account

Complete the following procedure to view the product recommendation information for an account where a needs analysis has been completed.

Product recommendations are regarded as a suitable fit for an account and an application capture process can be initiated for recommended products as shown in "[Applying for Products for an Account](#)" on page 9-10.

### To view the recommendation information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

You must select an account where a needs analysis has been completed, otherwise there will be no recommendation information for the account.

3. Tap Recommendations in the list in the left pane.

All (product) recommendations associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.

The product recommendations shown in this view come from the needs analysis that you started in "[Performing Needs Analysis for Accounts](#)" on page 9-5.

## Applying for Products for an Account

Applying for a product for an account involves initiating an application capture process for the product and then submitting the completed application for the product from the Recommendations view. Product recommendations are regarded as a suitable fit for an account.

### To apply for a product for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

You must select an account where a needs analysis has been completed, otherwise there will be no recommendation information for the account.

3. Tap Recommendations in the list in the left pane.

All product recommendations associated with the account appear in the work area, and all details for the selected account appear above the list in the work area.

The product recommendations shown come from the needs analysis that you started in ["Performing Needs Analysis for Accounts"](#) on page 9-5.

4. If required, tap Detail to start a Viewer to present additional information about the product and obtain feedback from customers about the presented content.

The Viewer that you start is similar to the PCD Viewer that is used to deliver personalized content to customers in the Siebel Pharma application. For information about how to use the Viewer, see the following topics:

- ["Using the PCD Viewer in Siebel Mobile"](#) on page 5-29
- ["Showing Presentations in Siebel Mobile"](#) on page 5-30
- ["Recording Responses to Presentations in Siebel Mobile"](#) on page 5-32

5. In the Products applet, select a product and then tap Apply.

Doing this initiates the application capture process from OPA for the product. The composition and structure of the application capture process varies according to the OPA Rule Base set up for your implementation of the application capture process for the selected product.

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**Note:** For information about integrating Oracle Policy Automation (OPA) for Siebel business applications, which includes creating and deploying rule base definitions in OPA, see *Siebel eService Administration Guide for Siebel Open UI*. For information about the OPA-specific workflows for Siebel Finance, see [Chapter 10, "Oracle Policy Automation Integration Workflows for Siebel Finance."](#) The sample Oracle Policy Automation rule base that is shipped with the product illustrates the capabilities of the integration between Oracle Policy Automation and Siebel Mobile.

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The following options are typically available to navigate the Application Capture view:

- **Next and Back.** Tap Next to progress through the application capture process or Back to return to the previous step in the application capture process.
- **Save.** Tap to save the application details you have captured so far and exit the application capture process.

An application record is created under the Accounts, Applications view to which you can return at a later date to complete. For information about resuming a previously saved application, see ["Managing Application Information for an Account"](#) on page 9-12.

- **Submit.** Tap to submit the completed application for a product.

An application record is created under the Accounts, Applications view. After you submit an application for a product, the application must be signed to complete the overall application capture process. For more information, see ["Managing Application Information for an Account"](#) on page 9-12.

- **Close.** Tap to exit the application capture process without saving the changes.

## Managing Application Information for an Account

Managing application information involves tracking the status of submitted applications, resuming any previously saved applications for products that have not been submitted, and signing any submitted applications.

### To manage the application information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:
  - The Accounts list and details for the selected account in the right pane or work area.
  - A list in the left pane in which you can select the related items for accounts.
2. Tap an account in the Accounts list.

You must select an account where a needs analysis has been completed, otherwise there will be no recommendation information for the account.
3. Tap Applications in the list in the left pane.

All application information associated with the account appears in the work area, and all details for the selected account appears above the list in the work area.
4. To resume an existing application in Saved status:
  - a. Select an application that has a status of Saved.
  - b. Tap Resume to return to the application capture session, and then complete the application as required.

When you tap Resume, the application capture process starts on the screen where you chose to save and exit the application capture process.
  - c. Tap Submit to submit the completed application.
5. To sign a completed application:
  - a. Tap an application that has a status of Submitted.
  - b. Tap Sign.

Information about the application appears.
  - c. In the Contact field, select the name of the contact who signs the application.
  - d. Capture the signature of the contact in the signature input box.

If you make a mistake when capturing the signature, tap Clear to clear the signature and start again.
  - e. Save the record.

## Managing Contacts for Siebel Finance

A *contact* is an individual with whom your company conducts business or expects to conduct business in the future. It can be an employee of another company, an independent consultant, a vendor, or an acquaintance.

The following procedures related to contacts and contact management are included in this topic:

- ["Displaying Contact Details"](#) on page 9-13
- ["Performing Needs Analysis for Contacts"](#) on page 9-15



- ["Modifying Contact Information" on page 9-15](#)
- ["Modifying Opportunity Information for a Contact" on page 9-16](#)
- ["Modifying Contact Team Information for a Contact" on page 9-16](#)
- ["Modifying Address Information for a Contact" on page 9-17](#)
- ["Viewing Financial Account Information for a Contact" on page 9-18](#)
- ["Modifying Note Information for a Contact" on page 9-18](#)
- ["Modifying Activity Information for a Contact" on page 9-19](#)
- ["Viewing Recommendation Information for a Contact" on page 9-19](#)
- ["Applying for Products for a Contact" on page 9-20](#)
- ["Managing Application Information for a Contact" on page 9-21](#)

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

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## Displaying Contact Details

You can display contact details by using the Contacts list.

### To display contact details

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
3. To view the related items for the selected contact, tap the following names in the list in the left pane:
  - **Opportunities.** Shows the opportunity information for the contact. For more information, see ["Modifying Opportunity Information for a Contact" on page 9-16](#).
  - **Contact Team.** Shows the contact team information for the contact. For more information, see ["Modifying Contact Team Information for a Contact" on page 9-16](#).
  - **Addresses.** Shows the address information for the contact. For more information, see ["Modifying Address Information for a Contact" on page 9-17](#).
  - **Financial Accounts.** Shows the financial account information for the contact. For more information, see ["Viewing Financial Account Information for a Contact" on page 9-18](#).
  - **Notes.** Shows the note information for the contact. For more information, see ["Modifying Note Information for a Contact" on page 9-18](#).
  - **Activities.** Shows the activity information for the contact. For more information, see ["Modifying Activity Information for a Contact" on page 9-19](#).

- **Recommendations.** Shows the product recommendations for the contact as recorded by the Oracle Policy Automation (OPA) needs analysis. For more information, see the following:
    - ["Performing Needs Analysis for Contacts"](#) on page 9-15
    - ["Viewing Recommendation Information for a Contact"](#) on page 9-19
  - **Applications.** Shows the application information for products for the contact. For more information, see ["Managing Application Information for a Contact"](#) on page 9-21.
4. In the Contacts list, tap the last name of a contact in the Last Name field.
  5. In the Contact 360 View that appears, complete the following steps:
    - a. In the contact form applet, review additional details about the contact.

Some of the information in this form comes from fields in the non-mobile application for Siebel Finance.
    - b. In the Timeline applet, review a timeline of the activities that are associated with the contact.

In the timeline, the icons denote the activity types, and the dates and times denote the ending dates and times of the activities.

You can tap Activities in the left pane to view additional details about the activities in the timeline and about any other activities for the contact, and then tap Contact 360 View in the left pane to return to the Contact 360 View.
    - c. In the applet that contains tiles of opportunity records, review the opportunities associated with the contact.

In the opportunity tiles, the speedometers denote the win-probabilities, and available fields include: sales stage, account, revenue, and close date.

You can tap Opportunities in the left pane to view additional details about the opportunities in the tiles and about any other opportunities for the contact, and then tap Contact 360 View in the left pane to return to the Contact 360 View.
    - d. In the Needs Analysis applet, conduct an OPA needs analysis and initiate an application capture process for a product by completing the following steps in the following order:
      - Start the needs analysis as shown in ["Performing Needs Analysis for Contacts"](#) on page 9-15.
      - Review product recommendations for the account as shown in ["Viewing Recommendation Information for a Contact"](#) on page 9-19.
      - Start the application capture process for a product and then save or submit the application as shown in ["Applying for Products for a Contact"](#) on page 9-20.
      - Track applications for products, resume existing applications, and sign completed applications as shown in ["Managing Application Information for a Contact"](#) on page 9-21.

## Performing Needs Analysis for Contacts

You perform a needs analysis for a contact to record information about the contact. However, you do not automatically create a financial application when you perform a needs analysis.

### To perform a needs analysis for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap the last name of a contact in the Contacts list.
3. In the Contact 360 View that appears, complete the following steps:
  - a. In the Needs Analysis applet, select a type of needs analysis.  
For example, select Savings.
  - b. Tap Start New.

Doing this initiates the needs analysis interview from OPA for the particular needs analysis selected in Step a.

The needs analysis interview consists of a series of views and questions. The composition and structure of the needs analysis interview varies according to the OPA Rule Base set up for your implementation of the selected type of needs analysis.

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**Note:** For information about integrating Oracle Policy Automation (OPA) for Siebel business applications, which includes creating and deploying rule base definitions in OPA, see *Siebel eService Administration Guide for Siebel Open UI*. For information about the OPA-specific workflows for Siebel Finance, see [Chapter 10, "Oracle Policy Automation Integration Workflows for Siebel Finance."](#) The sample Oracle Policy Automation rule base that is shipped with the product illustrates the capabilities of the integration between Oracle Policy Automation and Siebel Mobile.

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After completing the needs analysis interview, the Recommendations screen appears. For more information, see "[Viewing Recommendation Information for a Contact](#)" on page 9-19 and "[Applying for Products for a Contact](#)" on page 9-20.

## Modifying Contact Information

Complete the following procedure to modify contact information.

### To modify contact information

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.

2. Update an existing contact as follows:
  - a. Tap a contact in the Contacts list.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new contact as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new contact on the form that appears, and then save the record.

## Modifying Opportunity Information for a Contact

Complete the following procedure to modify the opportunity information for a contact.

### To modify the opportunity information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
3. Update an existing contact opportunity as follows:
  - a. Tap Opportunities in the list in the left pane.

All opportunities associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.
  - b. Tap the opportunity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing opportunity to the contact as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the opportunity on the list that appears, and then tap OK.
5. Create a new contact opportunity as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new opportunity on the form that appears, and then save the record.

## Modifying Contact Team Information for a Contact

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

**To modify the contact team information for a contact**

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
3. Update an existing contact team as follows:
  - a. Tap Contact Team in the list in the left pane.
 

All contact teams associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.
  - b. Tap the team member that you want to update.
  - c. Tap the record field that you want to update, and update the field value.
 

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing person to the contact team as follows:
  - a. Tap Contact Team in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the person on the list that appears, and then tap OK.

**Modifying Address Information for a Contact**

Complete the following procedure to modify the address information for a contact.

**To modify the address information for a contact**

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
3. Update an existing contact address as follows:
  - a. Tap Addresses in the list in the left pane.
 

All addresses associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.
 

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing address to the contact as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the address on the list that appears, then tap OK.
5. Create a new contact address as follows:

- a. Tap Addresses in the list in the left pane, and then tap the double plus (++) icon in the work area.
- b. Enter the information for the new address on the form that appears, and then save the record.

## Viewing Financial Account Information for a Contact

Complete the following procedure to view the financial account information for a contact. You cannot modify financial account information for a contact.

### To view the financial account information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
3. Tap Financial Accounts in the list in the left pane.

All financial accounts associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.
4. Tap the financial account that you want to view.

## Modifying Note Information for a Contact

Complete the following procedure to modify the note information for a contact.

### To modify the note information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
3. Update an existing contact note as follows:
  - a. Tap Notes in the list in the left pane.

All notes associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.
  - b. Tap the note that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new contact note as follows:
  - a. Tap Notes in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new note on the form that appears, and then save the record.

## Modifying Activity Information for a Contact

Complete the following procedure to modify the activity information for a contact.

### To modify the activity information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
3. Update an existing contact activity as follows:
  - a. Tap Activities in the list in the left pane.
 

All activities associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.
  - b. Tap the activity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.
 

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new contact activity as follows:
  - a. Tap Activities in the list in the left pane, then tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity on the form that appears, and then save the record.

## Viewing Recommendation Information for a Contact

Complete the following procedure to view the product recommendation information for a contact where a needs analysis has been completed.

Product recommendations are regarded as a suitable fit for a contact and an application process can be initiated for recommended products as shown in "[Applying for Products for a Contact](#)" on page 9-20.

### To view the recommendation information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
 

You must select a contact where a needs analysis has been completed, otherwise there will be no recommendation information for the contact.
3. Tap Recommendations in the list in the left pane.
 

All product recommendations associated with the contact appear in the work area, and all details for the selected contact appear above the list in the work area.

The product recommendations shown come from the needs analysis that you started in "[Performing Needs Analysis for Contacts](#)" on page 9-15.

## Applying for Products for a Contact

Applying for products for a contact involves initiating an application capture process for the product and then submitting the completed application for the product from the Recommendations view. Product recommendations are regarded as a suitable fit for a contact.

### To apply for a product for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.

You must select a contact where a needs analysis has been completed, otherwise there will be no recommendation information for the contact.

3. Tap Recommendations in the list in the left pane, and verify the recommendations.
4. If required, tap Detail to start a Viewer to present additional information about the product and obtain feedback from customers about the presented content.

The Viewer that you start is similar to the PCD Viewer that you use to deliver personalized content to customers in the Siebel Pharma application. For more information about how to use the Viewer, see the following topics:

- ["Using the PCD Viewer in Siebel Mobile"](#) on page 5-29
  - ["Showing Presentations in Siebel Mobile"](#) on page 5-30
  - ["Recording Responses to Presentations in Siebel Mobile"](#) on page 5-32
5. In the Products applet, select a product and then tap Apply.

Doing this initiates the application capture process from OPA for the product. The composition and structure of the application capture process varies according to the OPA Rule Base set up for your implementation of the application capture process for the selected product.

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**Note:** For information about integrating Oracle Policy Automation (OPA) for Siebel business applications, which includes creating and deploying rule base definitions in OPA, see *Siebel eService Administration Guide for Siebel Open UI*. For information about the OPA-specific workflows for Siebel Finance, see [Chapter 10, "Oracle Policy Automation Integration Workflows for Siebel Finance."](#) The sample Oracle Policy Automation rule base that is shipped with the product illustrates the capabilities of the integration between Oracle Policy Automation and Siebel Mobile.

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The following options are typically available to navigate the Application Capture view:

- **Next and Back.** Tap Next to progress through the application capture process or Back to return to the previous step in the application capture process.
- **Save.** Tap Save to save the application details you have captured so far and exit the application capture process



An application record is created under the Contacts, Applications view to which you can return at a later date to complete the process. For more information, see ["Managing Application Information for a Contact"](#) on page 9-21.

- **Submit.** Tap to submit the completed application for the product.

An application record is created under the Contacts, Applications view. After you submit an application for a product, the application must be signed to complete the overall application capture process. For more information, see ["Managing Application Information for a Contact"](#) on page 9-21.

- **Close.** Tap to exit the application capture process without saving the latest changes.

## Managing Application Information for a Contact

Managing application information involves tracking the status of submitted applications, resuming any previously saved applications for products that have not been submitted, and signing any submitted applications.

### To manage the application information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:
  - The Contacts list and details for the selected contact in the right pane or work area.
  - A list in the left pane in which you can select the related items for contacts.
2. Tap a contact in the Contacts list.
 

You must select a contact where a needs analysis has been completed, otherwise there will be no recommendation information for the contact.
3. Tap Applications in the list in the left pane.
 

All application information associated with the contact appears in the work area, and all details for the selected contact appears above the list in the work area.
4. To resume an existing application in Saved status:
  - a. Select an application that has a status of Saved.
  - b. Tap Resume to return to the application capture session, and then complete the application as required.
 

When you tap Resume, the application capture process starts on the screen where you choose to save and exit the application capture process.
  - c. Tap Submit to submit the completed application.
5. To sign a completed application:
  - a. Tap an application that has a status of Submitted.
  - b. Tap Sign.
 

Information about the application appears.
  - c. In the Contact field, select the name of the contact who signs the application.
  - d. Capture the signature of the contact in the signature input box.
 

If you make a mistake when capturing the signature, tap Clear to clear the signature and start again.
  - e. Save the record when finished.

## Managing Financial Applications for Siebel Finance

An *financial application* is a form that an individual or company submits to set up a financial account.

The following procedure related to financial applications and financial application management is included in this topic:

- ["Displaying Financial Application Details"](#) on page 9-22

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

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### Displaying Financial Application Details

You can display financial application details by using the Applications list. You cannot modify financial application information. This information originates in the non-mobile application for Siebel Finance.

#### To display financial application details

1. Tap the Side Menu icon on the application banner, and then tap Applications to display the Applications list and details for the selected financial application in the right pane or work area.
2. Tap a financial application in the Financial Applications list.

## Managing Opportunities for Siebel Finance

An *opportunity* is a potential revenue-generating event. It is usually associated with an account and one or more contacts, products, activities, and quotes.

The following procedures related to opportunities and opportunity management are included in this topic:

- ["Displaying Opportunity Details"](#) on page 9-22
- ["Modifying Opportunity Information"](#) on page 9-23
- ["Modifying Contact Information for an Opportunity"](#) on page 9-24
- ["Modifying Product Information for an Opportunity"](#) on page 9-24
- ["Modifying Quote Information for an Opportunity"](#) on page 9-25
- ["Modifying Activity Information for an Opportunity"](#) on page 9-26
- ["Modifying Opportunity Team Information for an Opportunity"](#) on page 9-26

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

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### Displaying Opportunity Details

You can display opportunity details by using the Opportunities list.

### To display opportunity details

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear below the list in the work area.
3. To view the related items for the selected opportunity, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the opportunity. For more information, see "[Modifying Contact Information for an Opportunity](#)" on page 9-24.
  - **Products.** Shows the product information for the opportunity. For more information, see "[Modifying Product Information for an Opportunity](#)" on page 9-24.
  - **Quotes.** Shows the quote information for the opportunity. For more information, see "[Modifying Quote Information for an Opportunity](#)" on page 9-25.
  - **Activities.** Shows the activity information for the opportunity. For more information, see "[Modifying Activity Information for an Opportunity](#)" on page 9-26.
  - **Opportunity Team.** Shows the opportunity team information for the opportunity. For more information, see "[Modifying Opportunity Team Information for an Opportunity](#)" on page 9-26.

## Modifying Opportunity Information

Complete the following procedure to modify opportunity information.

### To modify opportunity information

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Update an existing opportunity as follows:
  - a. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

3. Create a new opportunity as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new opportunity on the form that appears, and then save the record.

## Modifying Contact Information for an Opportunity

Complete the following procedure to modify the contact information for an opportunity.

### To modify the contact information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.

All details for the selected opportunity appear below the list in the work area.
3. Update an existing opportunity contact as follows:
  - a. Tap Contacts in the list in the left pane.

All contacts associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the opportunity as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap OK.
5. Create a new opportunity contact as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new contact on the form that appears, and then save the record.

## Modifying Product Information for an Opportunity

Complete the following procedure to modify the product information for an opportunity.

### To modify the product information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:

- The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear below the list in the work area.
  3. Update an existing opportunity product as follows:
    - a. Tap Products in the list in the left pane.  
All products associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the list in the work area.
    - b. Tap the product that you want to update.
    - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
  4. Create a new opportunity product as follows:
    - a. Tap Products in the list in the left pane, and then tap the plus (+) icon in the work area.
    - b. Enter the information for the new product on the form that appears, and then save the record.

## Modifying Quote Information for an Opportunity

Complete the following procedure to modify the quote information for an opportunity.

### To modify the quote information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.  
All details for the selected opportunity appear below the list in the work area.
3. Update an existing opportunity quote as follows:
  - a. Tap Quotes in the list in the left pane.  
All quotes associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the list in the work area.
  - b. Tap the quote that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new opportunity quote as follows:

- a. Tap Quotes in the list in the left pane, and then tap the plus (+) icon in the work area.
- b. Enter the information for the new quote on the form that appears, and then save the record.

## Modifying Activity Information for an Opportunity

Complete the following procedure to modify the activity information for an opportunity.

### To modify the activity information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.

All details for the selected opportunity appear below the list in the work area.
3. Update an existing opportunity activity as follows:
  - a. Tap Activities in the list in the left pane.

All activities associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the list in the work area.
  - b. Tap the activity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Create a new opportunity activity as follows:
  - a. Tap Activities in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity on the form that appears, and then save the record.

## Modifying Opportunity Team Information for an Opportunity

Complete the following procedure to modify the opportunity team information for an opportunity.

### To modify the opportunity team information for an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Opportunities to display the following:
  - The Opportunities list and details for the selected opportunity in the right pane or work area.
  - A list in the left pane in which you can select the related items for opportunities.
2. Tap an opportunity in the Opportunities list.

All details for the selected opportunity appear below the list in the work area.

3. Update an existing opportunity team as follows:
  - a. Tap Opportunity Team in the list in the left pane.  
All opportunity teams associated with the opportunity appear in the work area, and all details for the selected opportunity appear above the list in the work area.
  - b. Tap the team member that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing person to the opportunity team as follows:
  - a. Tap Opportunity Team in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the person on the list that appears, and then tap OK.

## Managing Households for Siebel Finance

A *household* is a group of people who live together in the same dwelling.

The following procedures related to households and household management are included in this topic:

- ["Displaying Household Details"](#) on page 9-27
- ["Modifying Household Information"](#) on page 9-28
- ["Modifying Contact Information for a Household"](#) on page 9-28
- ["Viewing Note Information for a Household"](#) on page 9-29
- ["Viewing Activity Information for a Household"](#) on page 9-30
- ["Viewing Opportunity Information for a Household"](#) on page 9-30
- ["Viewing Financial Account Information for a Household"](#) on page 9-30
- ["Modifying Address Information for a Household"](#) on page 9-31

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

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### Displaying Household Details

You can display household details by using the Households list.

#### To display household details

1. Tap the Side Menu icon on the application banner, and then tap Households to display the following:
  - The Households list and details for the selected household in the right pane or work area.
  - A list in the left pane in which you can select the related items for households.
2. Tap a household in the Households list.

3. To view the related items for the selected household, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the household. For more information, see "[Modifying Contact Information for a Household](#)" on page 9-28.
  - **Notes.** Shows the note information for the household. For more information, see "[Viewing Note Information for a Household](#)" on page 9-29.
  - **Activities.** Shows the activity information for the household. For more information, see "[Viewing Activity Information for a Household](#)" on page 9-30.
  - **Opportunities.** Shows the opportunity information for the household. For more information, see "[Viewing Opportunity Information for a Household](#)" on page 9-30.
  - **Financial Accounts.** Shows the financial information for the household. For more information, see "[Viewing Financial Account Information for a Household](#)" on page 9-30.
  - **Addresses.** Shows the address information for the household. For more information, see "[Modifying Address Information for a Household](#)" on page 9-31.

## Modifying Household Information

Complete the following procedure to modify household information.

### To modify household information:

1. Tap the Side Menu icon on the application banner, and then tap Households to display the following:
  - The Households list and details for the selected household in the right pane or work area.
  - A list in the left pane in which you can select the related items for households.
2. Update an existing household as follows:
  - a. Tap a household in the Households list.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new household as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new household on the form that appears, and then save the record.

## Modifying Contact Information for a Household

Complete the following procedure to modify the contact information for a household.

If you associate multiple contacts with a household, you can designate one of the contacts as the primary contact. The name of this primary contact appears in the Head of Household field for the household record.



**To modify the contact information for a household**

1. Tap the Side Menu icon on the application banner, and then tap Households to display the following:
  - The Households list and details for the selected household in the right pane or work area.
  - A list in the left pane in which you can select the related items for households.
2. Tap a household in the Households list.
3. Update an existing household contact as follows:
  - a. Tap Contacts in the list in the left pane.  
All contacts associated with the household appear in the work area, and all details for the selected household appear above the list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the household as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap OK.
5. Create a new household contact as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new contact on the form that appears, and then save the record.

**Viewing Note Information for a Household**

Complete the following procedure to view the note information for a household.

You can view the note information that is associated with all contacts of the household. For information about modifying the note information for each contact of the household, "[Modifying Note Information for a Contact](#)" on page 9-18.

**To view the note information for a household**

1. Tap the Side Menu icon on the application banner, and then tap Households to display the following:
  - The Households list and details for the selected household in the right pane or work area.
  - A list in the left pane in which you can select the related items for households.
2. Tap a household in the Households list.
3. Tap Notes in the list in the left pane.  
All notes associated with the household appear in the work area, and all details for the selected household appear above the list in the work area.
4. Tap the note that you want to view.

## Viewing Activity Information for a Household

Complete the following procedure to view the activity information for a household.

You can view the activity information that is associated with all contacts of the household. For information about modifying the activity information for each contact of the household, "[Modifying Activity Information for a Contact](#)" on page 9-19.

### To view the activity information for a household

1. Tap the Side Menu icon on the application banner, and then tap Households to display the following:
  - The Households list and details for the selected household in the right pane or work area.
  - A list in the left pane in which you can select the related items for households.
2. Tap a household in the Households list.
3. Tap Activities in the list in the left pane.

All activities associated with the household appear in the work area, and all details for the selected household appear above the list in the work area.
4. Tap the activity that you want to view.

## Viewing Opportunity Information for a Household

Complete the following procedure to view the opportunity information for a household.

You can view the opportunity information that is associated with all contacts of the household. For information about modifying the opportunity information for each contact of the household, "[Modifying Opportunity Information for a Contact](#)" on page 9-16.

### To view the opportunity information for a household

1. Tap the Side Menu icon on the application banner, and then tap Households to display the following:
  - The Households list and details for the selected household in the right pane or work area.
  - A list in the left pane in which you can select the related items for households.
2. Tap a household in the Households list.
3. Tap Opportunities in the list in the left pane.

All opportunities associated with the household appear in the work area, and all details for the selected household appear above the list in the work area.
4. Tap the opportunity that you want to view.

## Viewing Financial Account Information for a Household

Complete the following procedure to view the financial account information for a household. You cannot modify financial account information for a household.

You can view the financial account information that is associated with all contacts of the household. For information about viewing the financial account information for each contact of the household, "[Viewing Financial Account Information for a Contact](#)" on page 9-18.

**To view the financial account information for a household**

1. Tap the Side Menu icon on the application banner, and then tap Households to display the following:
  - The Households list and details for the selected household in the right pane or work area.
  - A list in the left pane in which you can select the related items for households.
2. Tap a household in the Households list.
3. Tap Financial Accounts in the list in the left pane.

All financial accounts associated with the household appear in the work area, and all details for the selected household appear above the list in the work area.
4. Tap the financial account that you want to view.

**Modifying Address Information for a Household**

Complete the following procedure to modify the address information for a household.

**To modify the address information for a household**

1. Tap the Side Menu icon on the application banner, and then tap Households to display the following:
  - The Households list and details for the selected household in the right pane or work area.
  - A list in the left pane in which you can select the related items for households.
2. Tap a household in the Households list.
3. Update an existing household address as follows:
  - a. Tap Addresses in the list in the left pane.

All addresses associated with the household appear in the work area, and all details for the selected household appear above the list in the work area.
  - b. Tap the address that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing address to the household as follows:
  - a. Tap Addresses in the list in the left pane, then tap the plus (+) icon in the work area.
  - b. Choose the Address on the list that appears, and then tap OK.
5. Create a new household address as follows:
  - a. Tap Addresses in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new address on the form that appears, and then save the record.

## Managing Financial Accounts for Siebel Finance

*A financial account is a record of the monetary transactions for an individual or company.*

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

- ["Displaying Financial Account Details"](#) on page 9-32
- ["Modifying Service Request Information for a Financial Account"](#) on page 9-32
- ["Viewing Balance History Information for a Financial Account"](#) on page 9-33
- ["Viewing Transaction Detail Information for a Financial Account"](#) on page 9-33

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

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### Displaying Financial Account Details

You can display financial account details by using the Financial Accounts list. You cannot modify financial account information. This information originates in the non-mobile application for Siebel Finance.

#### To display financial account details

1. Tap the Side Menu icon on the application banner, and then tap Financial Accounts to display the following:
  - The Financial Accounts list and details for the selected financial account in the right pane or work area.
  - A list in the left pane in which you can select the related items for financial accounts.
2. Tap a financial account in the Financial Accounts list.
3. To view the related items for the selected financial account, tap the following names in the list in the left pane:
  - **Service Requests.** Shows the service request information for the financial account. For more information, see ["Modifying Service Request Information for a Financial Account"](#) on page 9-32.
  - **Balance History.** Shows the balance history information for the financial account. For more information, see ["Viewing Balance History Information for a Financial Account"](#) on page 9-33.
  - **Transaction Detail.** Shows the transaction detail information for the financial account. For more information, see ["Viewing Transaction Detail Information for a Financial Account"](#) on page 9-33.

### Modifying Service Request Information for a Financial Account

Complete the following procedure to modify the service request information for a financial account.

#### To modify the service request information for a financial account

1. Tap the Side Menu icon on the application banner, and then tap Financial Accounts to display the following:

- The Financial Accounts list and details for the selected financial account in the right pane or work area.
  - A list in the left pane in which you can select the related items for financial accounts.
2. Tap a financial account in the Financial Accounts list.
  3. Update an existing financial account service request as follows:
    - a. Tap Service Requests in the list in the left pane.
 

All service requests associated with the financial account appear in the work area, and all details for the selected financial account appear above the list in the work area.
    - b. Tap the service request that you want to update.
    - c. Tap the record field that you want to update, and update the field value.
 

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
  4. Create a new financial account service request as follows:
    - a. Tap Service Requests in the list in the left pane, and then tap the plus (+) icon in the work area.
    - b. Enter the information for the new service request on the form that appears, and then save the record.

## Viewing Balance History Information for a Financial Account

Complete the following procedure to view the balance history information for a financial account.

### To view the balance history information for a financial account

1. Tap the Side Menu icon on the application banner, and then tap Financial Accounts to display the following:
  - The Financial Accounts list and details for the selected financial account in the right pane or work area.
  - A list in the left pane in which you can select the related items for financial accounts.
2. Tap a financial account in the Financial Accounts list.
3. Tap Balance History in the list in the left pane.
 

All balance histories associated with the financial account appear in the work area, and all details for the selected financial account appear above the list in the work area.
4. Tap the balance history that you want to view.

## Viewing Transaction Detail Information for a Financial Account

Complete the following procedure to view the transaction detail information for a financial account.

### To view the transaction detail information for a financial account

1. Tap the Side Menu icon on the application banner, and then tap Financial Accounts to display the following:

- The Financial Accounts list and details for the selected financial account in the right pane or work area.
  - A list in the left pane in which you can select the related items for financial accounts.
2. Tap a financial account in the Financial Accounts list.
  3. Tap Transaction Detail in the list in the left pane.

All transaction details associated with the financial account appear in the work area, and all details for the selected financial account appear above the list in the work area.
  4. Tap the transaction detail that you want to view.

## Managing Activities for Siebel Finance

An *activity* is a task that you perform for a contact, account, or opportunity.

The following procedures related to activities and activity management are included in this topic:

- ["Displaying Activity Details"](#) on page 9-34
- ["Modifying Activity Information"](#) on page 9-35
- ["Modifying Contact Information for an Activity"](#) on page 9-35
- ["Modifying Employee Information for an Activity"](#) on page 9-36

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

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### Displaying Activity Details

You can display activity details by using the Activities list.

#### To display activity details

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. To view the related items for the selected activity, tap the following names in the list in the left pane:
  - **Contacts.** Shows the contact information for the activity. For more information, see ["Modifying Contact Information for an Activity"](#) on page 9-35.
  - **Employees.** Shows the employee information for the activity. For more information, see ["Modifying Employee Information for an Activity"](#) on page 9-36.

## Modifying Activity Information

Complete the following procedure to modify activity information.

### To modify activity information

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Update an existing activity as follows:
  - a. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new activity as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new activity on the form that appears, and then save the record.

## Modifying Contact Information for an Activity

Complete the following procedure to modify the contact information for an activity.

### To modify the contact information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. Update an existing activity contact as follows:
  - a. Tap Contacts in the list in the left pane.

All contacts associated with the activity appear in the work area, and all details for the selected activity appear above the list in the work area.
  - b. Tap the contact that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing contact to the activity as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the contact on the list that appears, and then tap OK.

5. Create a new activity contact as follows:
  - a. Tap Contacts in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new contact on the form that appears, and then save the record.

## Modifying Employee Information for an Activity

Complete the following procedure to modify the employee information for an activity.

### To modify the employee information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:
  - The Activities list and details for the selected activity in the right pane or work area.
  - A list in the left pane in which you can select the related items for activities.
2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.
3. Update an existing activity employee as follows:
  - a. Tap Employees in the list in the left pane.

All employees associated with the activity appear in the work area, and all details for the selected activity appear above the list in the work area.
  - b. Tap the employee that you want to update.
  - c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
4. Add an existing employee to the activity as follows:
  - a. Tap Employees in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the employee on the list that appears, and then tap OK.

## Managing Leads for Siebel Finance

A *lead* is a new prospect or existing customer who might become an opportunity.

The following procedures related to leads and lead management are included in this topic:

- ["Displaying Lead Details"](#) on page 9-37
- ["Modifying Lead Information"](#) on page 9-37
- ["Modifying Opportunity Information for a Lead"](#) on page 9-37
- ["Converting a Lead to an Opportunity"](#) on page 9-38

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

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## Displaying Lead Details

You can display lead details by using the Leads list.

### To display lead details

1. Tap the Side Menu icon on the application banner, and then tap Leads to display the following:
  - The Leads list and details for the selected lead in the right pane or work area.
  - A list in the left pane in which you can select the related items for leads.
2. Tap a lead in the Leads list.

All details for the selected lead appear below the list in the work area.
3. To view the related items for the selected lead, tap the following name in the left pane:
  - **Opportunities.** Shows the opportunity information for the lead. For more information, see the following:
    - \* ["Modifying Opportunity Information for a Lead"](#) on page 9-37
    - \* ["Converting a Lead to an Opportunity"](#) on page 9-38

## Modifying Lead Information

Complete the following procedure to modify lead information.

### To modify lead information

1. Tap the Side Menu icon on the application banner, and then tap Leads to display the following:
  - The Leads list and details for the selected lead in the right pane or work area.
  - A list in the left pane in which you can select the related items for leads.
2. Update an existing lead as follows:
  - a. Tap a lead in the Leads list.

All details for the selected lead appear below the list in the work area.
  - b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
3. Create a new lead as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new lead on the form that appears, and then save the record.

## Modifying Opportunity Information for a Lead

Complete the following procedure to modify the opportunity information for a lead.

### To modify the opportunity information for a lead

1. Tap the Side Menu icon on the application banner, and then tap Leads to display the following:
  - The Leads list and details for the selected lead in the right pane or work area.

- A list in the left pane in which you can select the related items for leads.
- 2. Tap a lead in the Leads list.  
All details for the selected lead appear below the list in the work area.
- 3. Update an existing lead opportunity as follows:
  - a. Tap Opportunities in the list in the left pane.  
All opportunities associated with the lead appear in the work area, and all details for the selected lead appear above the list in the work area.
  - b. Tap the opportunity that you want to update.
  - c. Tap the record field that you want to update, and update the field value.  
You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.
- 4. Add an existing opportunity to the lead as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Choose the opportunity on the list that appears, and then tap OK.
- 5. Create a new lead opportunity as follows:
  - a. Tap Opportunities in the list in the left pane, and then tap the double plus (++) icon in the work area.
  - b. Enter the information for the new opportunity on the form that appears, and then save the record.

## Converting a Lead to an Opportunity

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

### To convert a lead to an opportunity

1. Tap the Side Menu icon on the application banner, and then tap Leads to display the following:
  - The Leads list and details for the selected lead in the right pane or work area.
  - A list in the left pane in which you can select the related items for leads.
2. Tap a lead in the Leads list.  
All details for the selected lead appear below the list in the work area.
3. Tap the Convert link to convert the lead to an opportunity.

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**Note:** You can convert only a lead that includes a contact. If the lead includes a prospect, then you must promote the prospect to a contact before you can convert the lead to an opportunity.

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## Managing Service Requests for Siebel Finance

A *service request* is a customer request for service. It includes the activities associated with the request and information about the response to the request.

The following procedures related to service requests and service request management are included in this topic:

- ["Displaying Service Request Details"](#) on page 9-39
- ["Modifying Service Request Information"](#) on page 9-39
- ["Modifying Order Information for a Service Request"](#) on page 9-40
- ["Modifying Activity Information for a Service Request"](#) on page 9-40

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

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### Displaying Service Request Details

You can display service request details by using the Service Requests list.

#### To display service request details

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.  
All details for the selected service request appear below the list in the work area.
3. To view the related items for the selected service request, tap the following names in the list in the left pane:
  - **Orders.** Shows the order information for the service request. For more information, see ["Modifying Order Information for a Service Request"](#) on page 9-40.
  - **Activities.** Shows the activity information for the service request. For more information, see ["Modifying Activity Information for a Service Request"](#) on page 9-40.

### Modifying Service Request Information

Complete the following procedure to modify service request information.

#### To modify service request information

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.

2. Update an existing service request as follows:
  - a. Tap a service request in the Service Requests list.  
All details for the selected service request appear below the list in the work area.
  - b. Tap the pencil icon, update the information as required, and then save the record.  
You might not be allowed to update all fields in the record.
3. Create a new service request as follows:
  - a. Tap the plus (+) icon in the work area.
  - b. Enter the information for the new service request on the form that appears, and then save the record.

## Modifying Order Information for a Service Request

Complete the following procedure to modify the order information for a service request.

### To modify the order information for a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:
  - The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.  
All details for the selected service request appear below the list in the work area.
3. Update an existing service request order as follows:
  - a. Tap Orders in the list in the left pane.  
All orders associated with the service request appear in the work area, and all details for the selected service request appear above the list in the work area.
  - b. Tap the order that you want to update.
  - c. Tap the pencil icon, update the information as required, and then save the record.  
You might not be allowed to update all fields in the record.
4. Create a new service request order as follows:
  - a. Tap Orders in the list in the left pane, and then tap the plus (+) icon in the work area.
  - b. Enter the information for the new order on the form that appears, and then save the record.

## Modifying Activity Information for a Service Request

Complete the following procedure to modify the activity information for a service request.

### To modify the activity information for a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:

- The Service Requests list and details for the selected service request in the right pane or work area.
  - A list in the left pane in which you can select the related items for service requests.
2. Tap a service request in the Service Requests list.  
All details for the selected service request appear below the list in the work area.
  3. Update an existing service request activity as follows:
    - a. Tap Activities in the list in the left pane.  
All activities associated with the service request appear in the work area, and all details for the selected service request appear above the list in the work area.
    - b. Tap the activity that you want to update.
    - c. Tap the pencil icon, update the information as required, and then save the record.  
You might not be allowed to update all fields in the record.
  4. Create a new service request activity as follows:
    - a. Tap Activities in the list in the left pane, and then tap the plus (+) icon in the work area.
    - b. Enter the information for the new activity on the form that appears, and then save the record.



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## Oracle Policy Automation Integration Workflows for Siebel Finance

This appendix includes information about the Oracle Policy Automation (OPA) workflows for Siebel Finance.

- ["Oracle Policy Automation Integration Workflows for Interview Sessions"](#) on page 10-1
- ["Oracle Policy Automation Integration Workflows for Siebel Finance"](#) on page 10-2

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**Note:** If you cannot see all of the detail in some of the larger workflow diagrams in this appendix, then you can view these workflows in Siebel Tools to see a clearer image.

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### Oracle Policy Automation Integration Workflows for Interview Sessions

The following Oracle Policy Automation (OPA) workflows control processing for interview sessions on a Web site:

- **OPA Interview Service Main Workflow.** This workflow manages an interview session when customers apply for benefits and screen for services. It drives an interview session by calling other workflows. The OPA Interview Service Main Workflow calls this workflow as a subprocess.
- **OPA Get PreSeed Data Workflow.** This workflow gets the pre-seed data for an interview session.
- **OPA Interview Service Sub Workflow.** This workflow manages the communication between an interview session for a customer and OPA by sending requests to OPA and receiving and processing responses from OPA. OPA responses are converted to the Siebel data structure and appear in the user interface for the interface session. The OPA Interview Service Main Workflow calls this workflow as a subprocess.
- **OPA Process Submit Data Workflow.** This workflow converts the integration object for submitting data in OPA format to an integration object in Siebel format. The OPA Interview Service Main Workflow calls this workflow as a subprocess.
- **OPA End Interview Workflow.** This workflow ends an interview session. The OPA Interview Service Main Workflow calls this workflow as a subprocess when the user closes an interview session.

- **OPA Get Meta Data Service for PUB Sample Intake Contact Workflow.** This workflow prepares a response to a Simple Object Access Protocol (SOAP) GetMetadata request from the Oracle Policy Automation Hub, and sends the PUB Sample Intake Contact integration object to OPA.
- **OPA Metadata Service - CheckAlive Workflow.** This workflow sends a response to SOAP CheckAlive request from the Oracle Policy Automation Hub to OPA.

For more information about each of these workflows and about integrating OPA for Siebel Business applications, see *Siebel eService Administration Guide for Siebel Open UI*.

## Oracle Policy Automation Integration Workflows for Siebel Finance

This group of workflows controls processing for Siebel Finance-related interview sessions, which can be conducted from your Siebel Mobile or Siebel desktop application. It includes the following workflows:

- ["FINS Needs Analysis Account Main Workflow"](#) on page 10-2
- ["FINS Needs Analysis Contact Main Workflow"](#) on page 10-5
- ["FINS Application Capture Main Workflow"](#) on page 10-8

### FINS Needs Analysis Account Main Workflow

This workflow manages an interview session from OPA for a particular type of needs analysis for an account. This workflow:

- Is called from the following Business Component: FINS Needs Analysis Account.
- Contains the following Business Component User Properties:
  - Name: BCPreseedField1  
Value: Rulebase:FINS Needs Analysis.Rule Base
  - Name: BCPreseedField2  
Value: SeedAccountId:FINS Account - Mobile.Id
  - Name: WFInputArgs1  
Value: Business Service:OPA Interview Framework Service
  - Name: WFInputArgs2  
Value: Method:InvokeWorkflow
  - Name: WFInputArgs3  
Value: GotoViewName:FINS Account Recommendation View - Mobile
  - Name: WFInputArgs4  
Value: WorkflowName:FINS Needs Analysis Account Main Workflow
  - Name: WFInputArgs5  
Value: MappingName:FINSCheckingAccountMappings
- Uses the following Business Component Class: CSSBCFINSIntw.

Note that this is a specialized class for business components, which supports the following business component user properties:

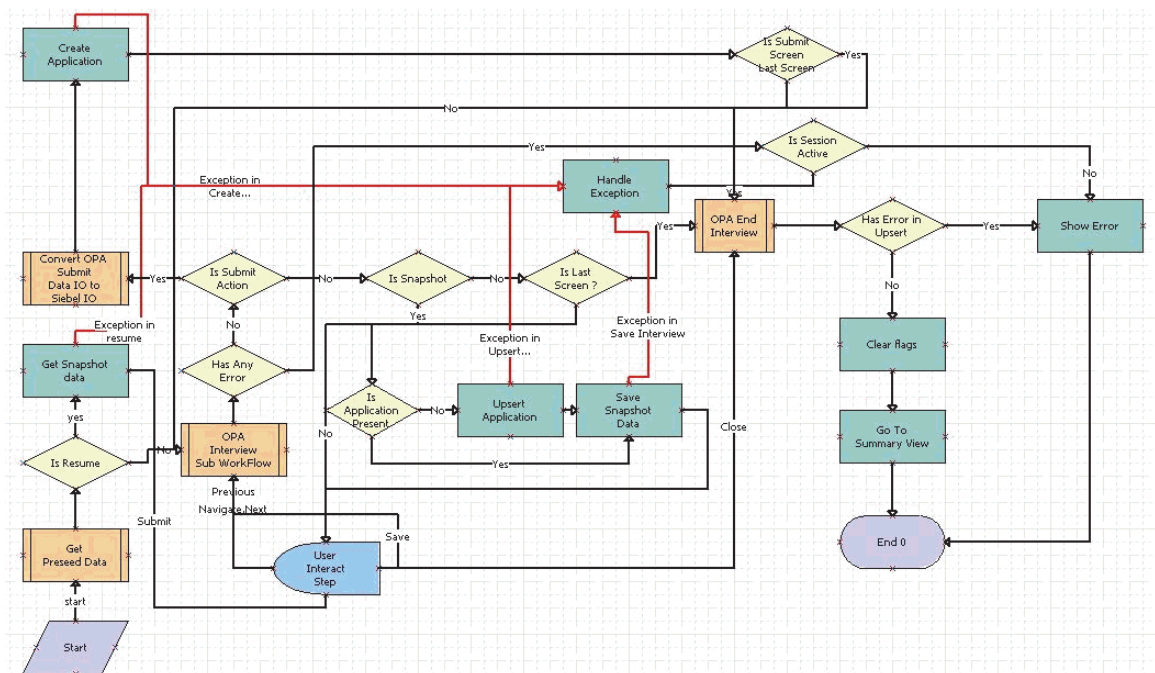


- BCPreseedField<x> where x is any positive number, and prepares the property set in format [Rulebase]=<Value of BC field FINS Needs Analysis.Rule Base>.
- WFInputArgs<x> where x is any positive number, and prepares the property set in format [Business Service] = "OPA Interview Framework Service".
- Uses the following Apply Button method: StartFINSInterview.

The FINS Needs Analysis Account Main workflow is the driver workflow to start a needs analysis for an account. Figure 10–1 shows this workflow.

A customer calls the FINS Needs Analysis Account Main workflow by selecting an option (a type of needs analysis) in the Needs Analysis applet on the Account 360 View of the Siebel Mobile application for Siebel Finance.

**Figure 10–1 FINS Needs Analysis Account Main Workflow**



**Workflow Description.** This workflow performs the following actions:

1. **Is Resume.** This step determines whether the action for the interview request applies to resuming an existing interview.
2. **Get Preseed Data.** This step calls the Oracle Policy Automation (OPA) Get PreSeed Data Workflow.
3. **OPA Interview Sub WorkFlow.** This step calls the OPA Interview Service Sub Workflow.
4. **Get Snapshot data.** This step calls the Upsert Record method from the PUB OPA Utilities Service business service. This method reads the saved interview session with base64 data.
5. **User Interact Step.** This step evaluates the user action to render the interview session. The following events are configured in this step:
  - FrameEventMethodWFSave
  - FrameEventMethodWFNavigate

- FrameEventMethodWFSubmit
  - FrameEventMethodWFMyApplications
  - FrameEventMethodWFClose
6. **Has Any Error.** This step determines whether the OPA response contains an error.
  7. **Is Session Active.** This step determines whether an active interview session exists.
  8. **Is Submit Action.** This step determines whether the user taps the Submit button in the interview session.
  9. **Is Snapshot.** This step determines whether the user taps the Save button in the interview session.
  10. **Is Last Screen?** This step determines whether the screen that appears is the last screen of the interview session.
  11. **Is Application Present.** This step determines whether an application record already exists for the interview session.
  12. **Upsert Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method returns the Id and application number.
  13. **Handle Exception.** This step calls the Error Handling method from the OPA Interview Framework Service business service if errors or Simple Object Access Protocol (SOAP) fault exceptions occur during the OPA outbound proxy call. The input arguments to this method are the fault code and fault string.
  14. **Save Snapshot Data.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and method. This method creates the interview session record with base64 data.
  15. **Convert OPA Submit Data IO to Siebel IO.** This step calls the OPA Process Submit Data Workflow.
  16. **Create Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method creates the application record with a Save status, and returns the Id and application number.
  17. **Is Submit Screen Last Screen.** This step determines whether the screen that appears is the last screen of the interview session.
  18. **OPA End Interview.** This step calls the OPA End Interview Workflow.
  19. **Has Any Error.** This step determines whether the OPA response contains an error.
  20. **Show Error.** This step calls the ShowErrors method from the OPA Interview Framework Service business service to show the errors that occurred when sending the request to OPA.
  21. **Clear Flags.** This step calls the Clearflags method from the OPA Interview.
  22. **Go To Summary View.** This step calls the GotoView method from the FINS Teller UI Navigation business service to navigate to the home page or the My Applications applet, depending on the user action.

## FINS Needs Analysis Contact Main Workflow

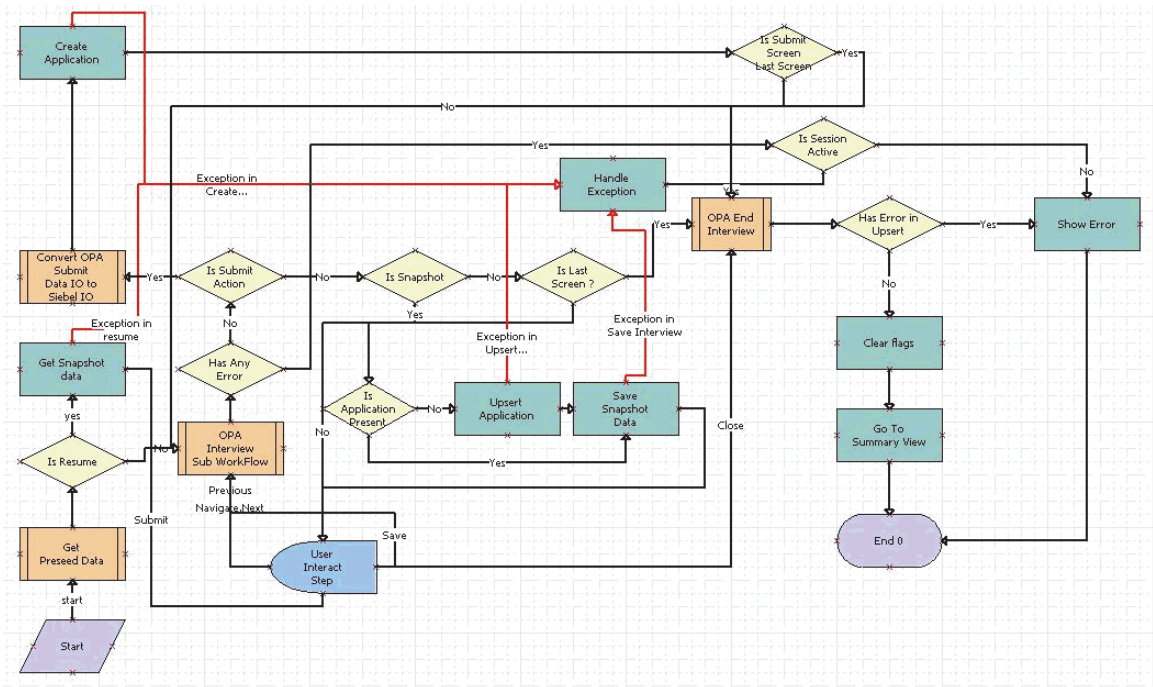
This workflow manages an interview session from OPA for a particular type of needs analysis for a contact. This workflow:

- Is called from the following Business Component: FINS Needs Analysis Contact.
- Contains the following Business Component User Properties:
  - Name: BCPreseedField1  
Value: Rulebase:FINS Needs Analysis.Rule Base
  - Name: BCPreseedField2  
Value: SeedContactId:FINS Contact - Mobile.Id
  - Name: WFInputArgs1  
Value: Business Service:OPA Interview Framework Service
  - Name: WFInputArgs2  
Value: Method:InvokeWorkflow
  - Name: WFInputArgs3  
Value: GotoViewName:FINS Contact Recommendation View - Mobile
  - Name: WFInputArgs4  
Value: WorkflowName:FINS Needs Analysis Contact Main Workflow
  - Name: WFInputArgs5  
Value:MappingName:FINSCheckingContactMappings
- Uses the following Business Component Class: CSSBCFINSIntw.  
This is a specialized class for business components, which supports the following business component user properties:
  - BCPreseedField<x> where *x* is any positive number, and prepares the property set in format [Rulebase]=<Value of BC field FINS Needs Analysis.Rule Base>.
  - WFInputArgs<x> where *x* is any positive number, and prepares the property set in format [Business Service] = "OPA Interview Framework Service".
- Uses the following Apply Button method: StartFINSInterview.

The FINS Needs Analysis Contact Main workflow is the driver workflow to start a needs analysis for a contact. [Figure 10-2](#) shows this workflow.

A customer calls the FINS Needs Analysis Contact Main workflow by selecting an option (a type of needs analysis) in the Needs Analysis applet on the Contact 360 View of the Siebel Mobile application for Siebel Finance.

Figure 10–2 FINS Needs Analysis Main Workflow



**Workflow Description.** This workflow performs the following actions:

1. **Is Resume.** This step determines whether the action for the interview request applies to resuming an existing interview.
2. **Get Preseed Data.** This step calls the Oracle Policy Automation (OPA) Get PreSeed Data Workflow.
3. **OPA Interview Sub WorkFlow.** This step calls the OPA Interview Service Sub Workflow.
4. **Get Snapshot data.** This step calls the Upsert Record method from the PUB OPA Utilities Service business service. This method reads the saved interview session with base64 data.
5. **User Interact Step.** This step evaluates the user action to render the interview session. The following events are configured in this step:
  - FrameEventMethodWFSave
  - FrameEventMethodWFNavigate
  - FrameEventMethodWFSubmit
  - FrameEventMethodWFMyApplications
  - FrameEventMethodWFClose
6. **Has Any Error.** This step determines whether the OPA response contains an error.
7. **Is Session Active.** This step determines whether an active interview session exists.
8. **Is Submit Action.** This step determines whether the user taps the Submit button in the interview session.

9. **Is Snapshot.** This step determines whether the user taps the Save button in the interview session.
10. **Is Last Screen?** This step determines whether the screen that appears is the last screen of the interview session.
11. **Is Application Present.** This step determines whether an application record already exists for the interview session.
12. **Upsert Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method returns the Id and application number.
13. **Handle Exception.** This step calls the Error Handling method from the OPA Interview Framework Service business service if errors or Simple Object Access Protocol (SOAP) fault exceptions occur during the OPA outbound proxy call. The input arguments to this method are the fault code and fault string.
14. **Save Snapshot Data.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and method. This method creates the interview session record with base64 data.
15. **Convert OPA Submit Data IO to Siebel IO.** This step calls the OPA Process Submit Data Workflow.
16. **Create Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method creates the application record with a Save status, and returns the Id and application number.
17. **Is Submit Screen Last Screen.** This step determines whether the screen that appears is the last screen of the interview session.
18. **OPA End Interview.** This step calls the OPA End Interview Workflow.
19. **Has Any Error.** This step determines whether the OPA response contains an error.
20. **Show Error.** This step calls the ShowErrors method from the OPA Interview Framework Service business service to show the errors that occurred when sending the request to OPA.
21. **Clear Flags.** This step calls the Clearflags method from the OPA Interview.
22. **Go To Summary View.** This step calls the GotoView method from the FINS Teller UI Navigation business service to navigate to the home page or the My Applications applet, depending on the user action.

## FINS Application Capture Main Workflow

This workflow manages an interview session from OPA to apply for a product. This workflow:

- Is called from the following Business Component: FINS Product.
- Contains the following Business Component User Property:

Name: Named Method

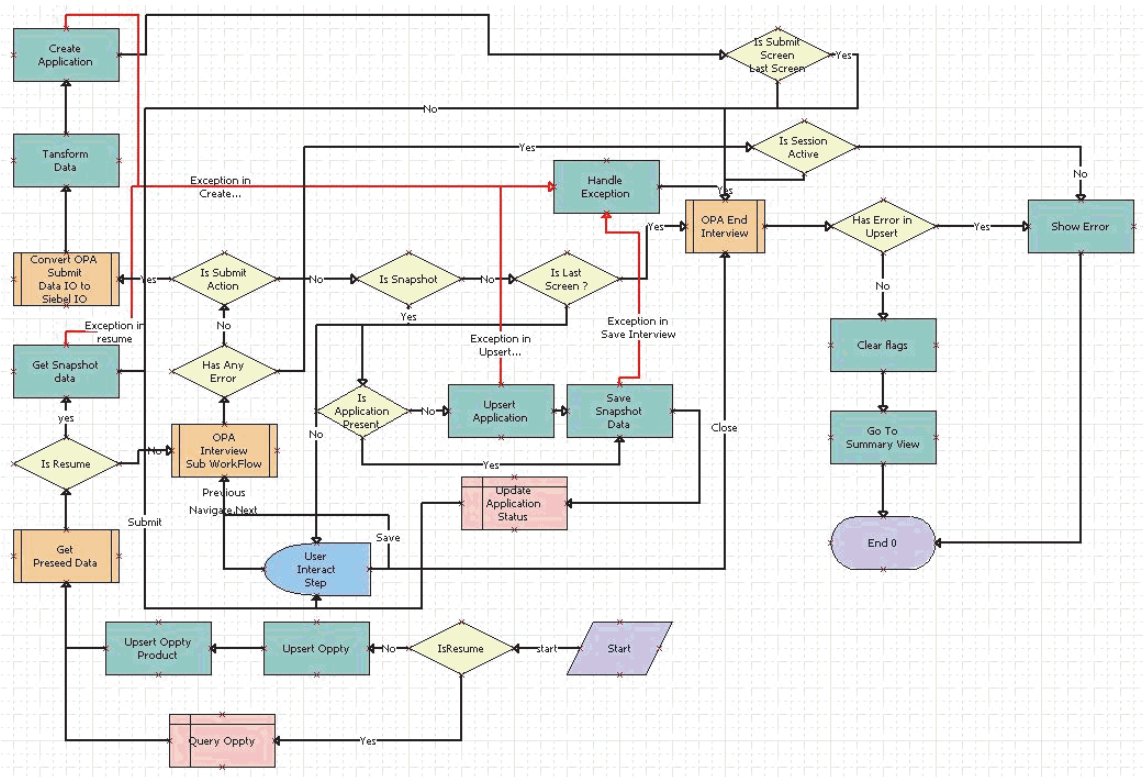
Value: "StartApplCapture", "INVOKESVC", "FINS Product", "OPA Interview Framework Service", "InvokeWorkflow", "SeedAccountId", "[Acc Id]", "SeedLeadId", "[Lead Id]", "SeedProductId", "[Id]", "MappingName", "FINSApplicationCaptureMappings", "Rulebase", "ApplicationCapture", "GotoViewName", "FINS Account Application View - Mobile", "SeedProductName", "[Name]"

- Uses the following Apply Button method: StartApplCapture.

The FINS Application Capture Main workflow drives the interview session to apply for a product by calling other workflows. [Figure 10–3](#) shows this workflow.

A customer calls the FINS Application Capture Main workflow by selecting a product and then tapping Apply in the Recommendations view of the Siebel Mobile application for Siebel Finance.

**Figure 10–3 FINS Application Capture Main Workflow**



**Workflow Description.** This workflow performs the following actions:

1. **Is Resume.** This step determines whether the action for the interview request applies to resuming an existing interview.

2. **Upsert Oppty.** Create an opportunity (application) for the given account.
3. **Upsert Opty Product.** For the opportunity created in Step 2, add the product for which the application capture process is taking place.
4. **Get Preseed Data.** This step calls the Oracle Policy Automation (OPA) Get PreSeed Data Workflow.
5. **OPA Interview Sub WorkFlow.** This step calls the OPA Interview Service Sub Workflow.
6. **Get Snapshot data.** This step calls the Upsert Record method from the PUB OPA Utilities Service business service. This method reads the saved interview session with base64 data.
7. **User Interact Step.** This step evaluates the user action to render the interview session. The following events are configured in this step:
  - FrameEventMethodWFSSave
  - FrameEventMethodWFNavigate
  - FrameEventMethodWFSubmit
  - FrameEventMethodWFMyApplications
  - FrameEventMethodWFClose
8. **Has Any Error.** This step determines whether the OPA response contains an error.
9. **Is Session Active.** This step determines whether an active interview session exists.
10. **Is Submit Action.** This step determines whether the user taps the Submit button in the interview session.
11. **Is Snapshot.** This step determines whether the user taps the Save button in the interview session.
12. **Is Last Screen?** This step determines whether the screen that appears is the last screen of the interview session.
13. **Is Application Present.** This step determines whether an application record already exists for the interview session.
14. **Upsert Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method creates the application record with a Save status, and returns the Id and application number.
15. **Handle Exception.** This step calls the Error Handling method from the OPA Interview Framework Service business service if errors or Simple Object Access Protocol (SOAP) fault exceptions occur during the OPA outbound proxy call. The input arguments to this method are the fault code and fault string.
16. **Save Snapshot Data.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and method. This method creates the interview session record with base64 data.
17. **Update Application Status.** This changes the application status to Saved.
18. **Convert OPA Submit Data IO to Siebel IO.** This step calls the OPA Process Submit Data Workflow.

- 19. Transform Data.** This uses the EAI Data Transformation Engine business service to transform OPA data to Siebel data using the following EAI data map: FINS Application Capture.
- 20. Create Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method creates the application record with a Save status, and returns the Id and application number.
- 21. Is Submit Screen Last Screen.** This step determines whether the screen that appears is the last screen of the interview session.
- 22. OPA End Interview.** This step calls the OPA End Interview Workflow.
- 23. Has Any Error.** This step determines whether the OPA response contains an error.
- 24. Show Error.** This step calls the ShowErrors method from the OPA Interview Framework Service business service to show the errors that occurred when sending the request to OPA.
- 25. Clear Flags.** This step calls the Clearflags method from the OPA Interview.
- 26. Go To Summary View.** This step calls the GotoView method from the FINS Teller UI Navigation business service to navigate to the home page or the My Applications applet, depending on the user action.
- 27. Query Oppty.** In the case of resuming an interview session, it queries the existing opportunity.



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