

Oracle Siebel CRM Release Updates (2023)

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Public

Overview

Oracle's Siebel CRM Release Updates in 2023 continue to deliver ROI and economic value. New innovations have become faster and easier to adopt for organizations using the latest Siebel CRM releases.

Features released in 2023 across the three innovation themes improve Agility, UX, Integration and simplify Cloud technology adoption.

Highlights include:

- **Developer Experience** - new features such as Web Script Profiler added to Web Tools and Workspaces. New wizards, usability and productivity enhancements for Developers. To complete the development cycle, data driven and productivity enhancements were included for Siebel Test Automation.
- **Customer Experience** - integration to Oracle Field Service for intelligent Field Service capabilities. We also added a SCAPI for Cloud-Based Contact Center integration.
- **Upgrade Factory** - an automated development upgrade that includes the quick setup of a development environment and the efficient transition from Siebel CRM 8.0 and above to the latest Siebel CRM Release Update. The Upgrade Factory can be run both on-premises or in Oracle Cloud Infrastructure (OCI). This allows Upgrades to be done in a cost efficient, low risk manner, with a shorter timeframe.
- **Integration** - Siebel CRM Event Pub Sub framework for Event Driven communication between Siebel Components and external event driven systems. This allows event publishing to and consuming from Kafka, considering various use cases of a typical Siebel CRM implementation. In addition to the Kafka integration we added even more enhancements to the REST API.
- **Industry** - specific innovations for Clinical Trials such as the Oracle Clinical One integration, For Communications, Customer Order Management enhancements.

During 2023, it was great to see our customers adopting the latest innovations that we released and embracing Oracle Cloud Infrastructure as a platform for their Siebel CRM implementation. In most cases customers report being able to reduce costs and improve performance. To find out more about recent customer success showcase stories, please read our [CloudWorld Highlights 2023 blog post](#).

If you are on an older Siebel CRM release, a common question is to find out what innovations you can embrace by updating Siebel CRM to the latest release. To find out about all the new innovations that have been introduced over the years, our annual Datasheets are all listed on the [Siebel CRM 2023 Release Datasheet](#) page.

Siebel CRM Customer Advisory Board

The Siebel CRM Customer Advisory Board (CAB) is one of many groups falling under Oracle's Global Customer Programs Community and has been vital in helping customers collaborate, share ideas, and drive our product roadmap for 25 years. We welcome all our customers and partners to join our CAB regardless of size or industry. To find out more about the Siebel CRM CAB program please read [this article](#). [Register here](#) to join our CAB mailing list.

Co-Innovation through our BETA Program

Essential for customers and partners that are members of our CAB and want to work closely with the Siebel CRM Product Management team to gain deeper insight into product features and innovations currently in development. All CAB members need to self-nominate to be part of the BETA program. This is easily done by [completing this form](#).

INNOVATION THEMES

The Siebel CRM product focuses on the following primary investment themes based on the feedback of our customers and market trends:

Core Technology

We recognize that your business needs to be agile with the ability to adopt new product innovations and to release competitive market solutions into your CRM deployment quickly. Our customers also want deployment choices: on-premise, cloud public/private or hybrid distributed clouds. As automated software processes and intelligence become pervasive, we recognize that this approach is multi-faceted through CRM and relies heavily on making intelligent use of data.

Customer Experience (CX)

Improved application user experience, mobility, developer experience as well as extending customer experience functionality with Oracle CX solutions (sales, marketing, service, commerce etc.).

Industry Innovation

Feature-rich solutions for 21 industries are constantly being updated to leverage cross-industry innovations. Given Oracle's Siebel CRM industry pedigree, it plays a key role in Oracle's end to end industry solution strategy. A modernization of industry applications, API's and core platforms that link front and back office with business processes based on industry standards and best practices.

CORE TECHNOLOGY

Improvements made to the core Siebel CRM product across applications, architecture, development and deployment for both on-premise and cloud modes.

Web Tools

New features were added into Web Tools that continue to improve developer experience, productivity and reduce cost.

Favorites and PDQs

Favorites in Web Tools allow developers to quickly navigate to saved objects so that they can resume or inspect their progress. This will reduce development time. *Note: "Favorites" were known as "Bookmarks" in the Siebel Tools client.*

Pre-Defined Queries (PDQs) allow developers to see only what they wish, reducing their development time.

Tab Order for Web Tools Applet Editor

The Applet Editor in Web Tools has been enhanced to provide for setting the tab order while editing an Applet Layout.

Change Records

This feature introduces the well-known Siebel feature "Change Records" to Web Tools. The Change Records feature enables you to perform bulk updates by modifying multiple records (up to four fields) at the same time.

Script Profiler/Tracer

Siebel Developers authoring scripts can now use the new Script Profile feature in Web Tools. This feature allows developers to optimize their scripts by examining how the script is actually used in the application, leading to improved application performance.

Object Wizards

New object wizards in Web Tools that allow developers to quickly create the following object types improving productivity and developer experience

- MVG

- Picklist
- Business Component
- Command
- Integration Object
- Transient Business Component

EIM Table Mapping Wizard

The new EIM Table Mapping Wizard in Siebel Web Tools allows developers to map an extension to an interface table. This wizard allows you to create or associate the new table to the interface table that uses EIM.

Developers can create EIM table mapping objects that import data into tables you define, and you can automate how Siebel Web Tools creates an EIM attribute map on an extension column that you add to a base table.

Task Wizard for Task Based User Interface

This new Web Tools wizard helps developers create new Task definitions for the Task Based User Interface (TBUI). TBUI is a great way to improve user experience and increase data accuracy by guiding a user to complete a series of steps in a job task and is particularly useful for complex tasks.

Migrated Objects Activated by Incremental Runtime Repository Migration

Configuration migrated to Runtime Repository environments via Incremental Migration will be made available to users, without a requirement for users to log out and back in. When a user navigates to a different view, any recently migrated configuration will take effect.

Test Automation

Siebel Test Automation data-driven capabilities are extended, along with several productivity enhancements.

- Data Sets can now be applied at Test Set level, in addition to individual Test Scripts. This provides more testing flexibility. Test Sets have also been enhanced to utilize a common data set across the associated Test Scripts. Test Sets now also support deep copy, which includes the associated Test Script and Data Sets.
- Data Sets are enhanced, providing the ability to control which rows of data are used for iterations at run time. An expression can be assigned to each row to determine if it is to be used at run time or not. These enhancements significantly improve the scope of data-driven test automation, as well as simplifying the creation and maintenance of Data Sets and Test Sets.
- The management of separate automation client machine pools has been improved. It is now possible to assign specific lights-out automated test runs to a specific client or a group of client machines at a given time. It is possible to redirect automation runs to specific clients. For example, you might want to redirect test runs to clients that have been configured for a specific browser version for compatibility tests. There is a notification option for run completions via the Notification Dashboard.

The key benefits of the Test Automation data-driven enhancements are primarily the ease of designing and maintaining test data sets applicable across large numbers of Test Scripts. This will reduce manual effort and increase testing productivity.

Integration

Siebel integration capabilities are extended further, including the introduction of a new framework for event driven communications between Siebel CRM and other systems.

Event Driven Communications (Siebel CRM Event Pub Sub)

Siebel CRM Event Pub/Sub is a new framework for Event Driven communication between Siebel Components and external event driven systems. This allows event publishing to and consuming from Kafka, considering various use cases of a typical Siebel CRM implementation. Kafka is a distributed event store and stream-processing platform. Key benefits include:

- Decoupling of event producers and consumers – Siebel CRM and integrated applications are decoupled in message exchange and move independent of each other in respective business domains of operation.
- Handle high volume of events – Event Pub/Sub is designed to handle a large number of transactions per hour/day.
- Scalability – Highly scalable with provisions for both Siebel CRM and Kafka upscaling
- Effective handling of Siebel CRM events – Subscription and asynchronous message processing capabilities offer the ability to respond appropriately from the perspective of the Siebel CRM application business needs.
- Agility – new producers and subscribers can be added without any work required by the existing producers and subscribers.
- Fault tolerance – The implementation resends failed records, from the stage where it failed and helps to minimize the “redo” process during any transaction of events.

Kafka maturity – Kafka is the most widely used message router and is extremely proven, an industry standard, and under active development.

REST API

Further enhancements to the widely adopted Siebel REST API.

CRUD Operations on Hierarchies through REST

This feature allows REST requests to create, update, and delete entire hierarchies of Siebel object records in a single request. Many fewer requests are necessary to alter records in Siebel hierarchies. Fewer requests provide better performance and efficiency. For example: Update an Account, its child Contacts, and grandchild Households are performed in a single request.

Enhanced Security for Repository Migration

This feature adds the ability to use encrypted passwords to execute Repository migrations through the Siebel Migration Application and through inbound REST calls. The benefit of this is that it removes the need for a DBA to share the database tableowner password with the Siebel Administration team.

REST Access to Dynamic Siebel Business Objects

This feature enhances the Siebel CRM REST API framework with the ability to dynamically expose desired Business Objects without having to create Base Integration Objects.

The key benefits for our customers are:

- Simplified process of exposing any Business Object via REST
- No overhead for developers to create Base Integration Objects
- No overhead for migrating Base Integration Objects from Development to Production
- No down time required, there is no need to restart Application Interface Tomcat instances, since there is no migration involved.

Enable/Disable Anonymous Access Through Inbound REST

This feature gives Siebel Application Administrators the ability to enable or disable anonymous access through inbound REST requests to Siebel data. If enabled, this ensures that every request will have a username and password restricting access to Siebel resources by Responsibility. This prevents unintended access to Siebel data and resources when an anonymous user has been given a Responsibility that provides broad access.

Siebel CRM Upgrade Factory (Cloud)

Siebel CRM Upgrade Factory delivers an automated development upgrade that includes the quick setup of a development environment and the efficient transition from Siebel CRM 8.0 and above to the latest Siebel CRM Release Update. Upgrade Factory simplifies the application upgrade process, allowing customers to upload their

customized, pre-IP2017 Repository to run the Upgrade/IRM process on Oracle Cloud Infrastructure (OCI). Running on OCI eliminates any dependencies on the customer's on-premise operating system and database platform. In addition, the development upgrade process will result in a merged Design Repository that will enable customers to either continue to use it as their new Siebel development environment in the OCI tenancy or export it and then import it back to their on-premise instance to continue development activities there.

Key benefits include:

- Perform Siebel CRM Upgrades in a low risk manner with a shorter timeframe
- Dramatically reduce lengthy provisioning cycles
- Easy to repeat, run Development Upgrades multiple times using the DevOps pipeline
- Flexibility to move your application with business customizations intact to Oracle Cloud Infrastructure

Siebel CRM Upgrade Factory (On-Premise)

Upgrade Factory enables a simpler, faster, more predictable upgrade process. Once the Siebel CRM application is upgraded, customers can take advantage of the latest innovations and adopt monthly updates via the continuous release model.

Upgrade Factory not only provides organizations with a simplified application upgrade process, but it also:

- Makes the transition of Siebel CRM 8.0 and later to the latest release more easily.
- Allows you to migrate your custom repository and data schema from older release of Siebel CRM to the current release.
- Enables execution of Incremental Repository Merge (IRM)
- Speeds deployment time with quick setup of a development environment
- Supports multiple-database platforms (Oracle Database, Microsoft SQL, IBM DB2 UDB) and operating systems (Oracle Linux 7, Solaris, Microsoft Windows, IBM AIX).
- Identifies conflicts and fixups that are needed before the upgrade.
- Completes an upgrade in a few clicks with minimal human intervention.

Remove SSSE Windows Dependency for Office 365 Integration

This feature eliminates the need for a Windows server when running Siebel Server Sync for Exchange (SSSE) with Office 365. This allows customers to run Siebel with SSSE in Unix or Linux environments, including deploying Siebel CRM on Oracle Cloud Infrastructure.

CUSTOMER EXPERIENCE

New features relating to enhancing customer experience were delivered in 2023.

Enhanced Field Service with Integrated Oracle Field Service

Companies are shifting to Service-based business models, recognizing Service as a potential profit center. [Oracle Field Service](#) (OFS) offers intuitive, AI-powered tools for routing, scheduling, and managing field service technicians. By integrating Siebel Field Service with OFS, the best-in-class appointment booking and scheduling features become available. This enables more efficient and on-time service experiences - every time.

The key features of this integration are:

- The integration supports use cases like Appointment Booking, Skill based assignment, Technician updates and Real-time data synchronization.
- An accelerator within Oracle Integration Cloud to quickly integrate Oracle Siebel CRM with Oracle Field Service.
- OFS will look for all employees who have the required skills and return slots only for those employees based on defined Skill rules.
- Siebel CRM co-exists as the primary Service application while scheduling information comes from OFS.

Client-Side SCAPI for Cloud-Based Contact Center Integration

This feature provides a client-side Siebel Communication API (SCAPI) to support CTI integration between Siebel CRM applications and cloud-based Contact Centers.

Implementing this API will help customers shift to Contact Center as a Service (CCaaS), leading to a reduced overall cost of IT operations.

UCM Transaction Manager - Callback Functions

This feature enhances the Universal Customer Master (UCM) Transaction Manager to keep data in UCM and third-party systems in a consistent state. Newly introduced callback functions allow developers to integrate with third-party systems and rollback transactions in case of unforeseen failures.

INDUSTRY INNOVATION

Industry-specific innovations delivered in 2023.

Customer Order Management

Two enhancements have been added for Customer Order Management:

Sharing profile attribute(s) values with remote configurator (sending and receiving) allow developers to re-use existing single object manager scripts with remote product configurator for improved performance and scalability

Alerts for sales reps when configuring multiple customizable products about incomplete configurations. The alert allows sales reps to capture the perfect quote or sales order in new creation and modify scenarios.

Oracle Clinical One Integration for Siebel Clinical Trials

The [Siebel Clinical Trials Management System](#) (CTMS) provides Inbound Web Services for an out-of-the-box, bi-directional integration with the HSGBU [Clinical One](#) platform. This enables automating the creation / update of information around Site, Subject visit template, Subject enrollment and Subject activity tracking information. These are different entities in Siebel CTMS that are exchanging information with Clinical One.

With the new integration flow of a Subject Visit template from Clinical One to CTMS, there is the option to apply the new / updated subject template to all subjects in one action. The batch apply feature is a new option in addition to the ability to apply the subject template to one subject at a time. The ability to batch apply to all subjects provides process efficiency to the end user, typically a Clinical Research Associate (CRA).

Between a CTMS and Electronic Data Capture (EDC), in this case, Clinical One data collection, there are typically lots of shared data between the two systems. End users want to be able to enter metadata, operational data or clinical data once and organically within the clinical trial process. They expect to have automation to flow that information to other systems and users where it will be utilized downstream, in other key parts of the trial process. This integration delivers process efficiency, elimination of duplicate / redundant effort in both systems, maintaining data quality and consistency, with these benefits leading to reduced time and costs.

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