



# Oracle Siebel CRM Release Updates (2024)

Version **[1.0]**

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## Overview

Oracle's Siebel CRM Release Updates in 2024 continue to deliver ROI and unlock modern technologies. New innovations are faster and easier to adopt for organizations using the latest Siebel CRM releases.

Highlights include:

- **Artificial Intelligence (AI)** – the Siebel AI framework has been extended to provide the ability to interoperate with prebuilt machine learning AI models including Oracle's Generative AI services. A collection of out-of-the box functional use cases are provided that use the Siebel AI Framework within both user-driven and automated task flows. The new enhancements provide organizations a standardized and faster route for using OCI AI services for a variety of use cases with Siebel CRM.
- **User Experience (UX)** – a new UX for Siebel CRM called "Redwood" that draws inspiration from the Oracle Redwood Design experience was introduced providing a fresh new look with improved navigation experience. Siebel Mobile was enhanced including the React Native framework and data synchronization improvements.
- **Upgrade Factory** – further enhanced with Upgrade Factory 2.0, which can now be run on environments going back to 7.8.2. Performance is enhanced, 22 languages are supported, as well as observability and the ability to run on no-development environments. Upgrade Factory enables one-time upgrades to be done in a cost efficient, low risk manner, with a shorter timeframe.
- **Integration** – the Siebel CRM Event Pub / Sub framework for Event Driven communication between Siebel components and external event driven systems is further enhanced. Updates include an enhanced JSON message structure, Kafka partition support and Siebel UCM event communication use-cases.
- **Industry** – specific innovations for Clinical Trials such as PowerTrials and Mobility. For Communications, Product Administration enhancements and Digital Business Experience.

During 2024, 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 2024 blog post](#).

If you are on an older Siebel CRM release, a common question is to find out what innovations you can adopt 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 2024 Release Datasheet](#) page.

## Siebel CRM Customer Advisory Board

The best way to keep up to date with all the latest Siebel CRM news, innovations, and events, and to participate in our product direction, is to join our Customer Advisory Board (CAB).

### Joining the Siebel CRM Customer Advisory Board

The Siebel CRM CAB, one of many groups falling under Oracle's Global Customer Programs Community, has been vital in helping customers collaborate, share ideas, and drive our product roadmap for 30 years. We welcome all customers and partners to join our CAB regardless of size or industry. For more information about the Siebel CRM CAB program, read [this article](#).

Join the CAB in just 3 simple steps:

1. [Click here](#) to join our CAB mailing list.
2. Request access to the private [Siebel CRM Customer Connect](#) group on LinkedIn.
3. Register for [Cloud Customer Connect](#) and follow Siebel CRM as one of your topic interests.

## INNOVATION THEMES

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

### Business & Applications

The following innovation theme helps to improve customer experience and drive revenue growth.

- **User Experience:** Improved application user experience, mobility and developer experience in Web Tools.
- **Artificial intelligence (AI)** - Enabling Siebel CRM data and processes to leverage modern technologies, such as AI and machine learning, is a crucial part of our AI-enabled CRM vision
- **Customer Experience:** Extending Siebel CRM customer experience functionality with Oracle CX solutions (sales, marketing, service, commerce, loyalty etc.).
- **Customer 360** – Achieving a successful CRM implementation and a complete customer 360 view requires a master data management (MDM) solution at the heart of any enterprise. Siebel Universal Customer Master (Siebel UCM) is designed to store a clean and unified profile for all customer data.
- **Industry solutions:** Siebel industry applications continue to be extended to leverage Oracle's best-of-breed cloud services to provide advanced industry solutions.

### Platform & Operations

The following innovation theme helps to improve Siebel CRM application operations, architecture and reduce TCO.

- **Modern architecture** – Our goal is to provide the ability to operate Siebel CRM as a modern standalone application or as part of wider industry cloud solutions with the same architecture and operational efficiencies at extreme scale. We are continually evolving our application architecture to be more open and optimized for cloud interoperability, aligning where appropriate to cloud native and Microservices, API-first, Cloud native, and Headless (MACH) architectural principles.
- **Multi-cloud operations** – our goal is to simplify cloud adoption for Siebel CRM by providing deployment choices and tooling to manage Siebel CRM in the cloud while embracing cloud native platform technologies.
- **Agility & DevOps** – The Siebel CRM application is now easier than ever to maintain and update. Our continued focus on agility enables enterprises to adapt to business challenges quicker than ever.
- **Integration** – Providing an open integration approach enables the Siebel CRM platform to embrace entirely new business models and technologies across industry cloud solutions.
- **Automation** – One of the key components of any DevOps cycle is to adequately test the application to ensure any defects or abnormal behavior are identified and rectified before release. Whether it's making internal updates to your Siebel CRM deployment, or applying a Monthly Update, the ability to automate functional and regression testing can see a dramatic improvement in quality and reduction in TCO.

# Business & Applications

The following innovations help to improve customer experience and drive revenue growth.

## Redwood UX

This feature provides a new User Experience (UX) for Siebel CRM called “Redwood” that draws inspiration from the Oracle Redwood Design experience. The new UX is built on the OpenUI framework yet offers more than just aesthetics; it is not just a new OpenUI theme or skin. It includes the following exclusive features:

Ask Oracle: introducing a new application home and global navigation experience that allows users to access Navigation, Notifications, Search—all in one place. Furthermore, it is easier to search for Screens, access tools available from a List view, navigate through Level 1 and Level 2 views, and receive Desktop Alerts / Toast notifications.

Oracle Redwood styling: new styles, colors, icons, and fonts in line with Oracle Redwood design that includes a new style sheet, neutral colors, sleek icons, and contemporary fonts. The fonts and colors are chosen to reflect the new color schemes introduced across Oracle's portfolio and are designed to reduce eyestrain. Bigger icons and less clutter also make it easier to navigate the UI.

Restyled Homepage, Screens and Views: the application Homepage has been fully re-designed with a simplified header, fewer elements, and cleaner designs. The uncluttered layout comes with larger buttons and menus, emphasizing a less dense look and opening up space between page elements. The Application Toolbar and Menu Toolbar appear together as a single toolbar to be both user-friendly and consistent with other products in Oracle's portfolio. The new Redwood UX is available as an opt-in feature with no forced migration.

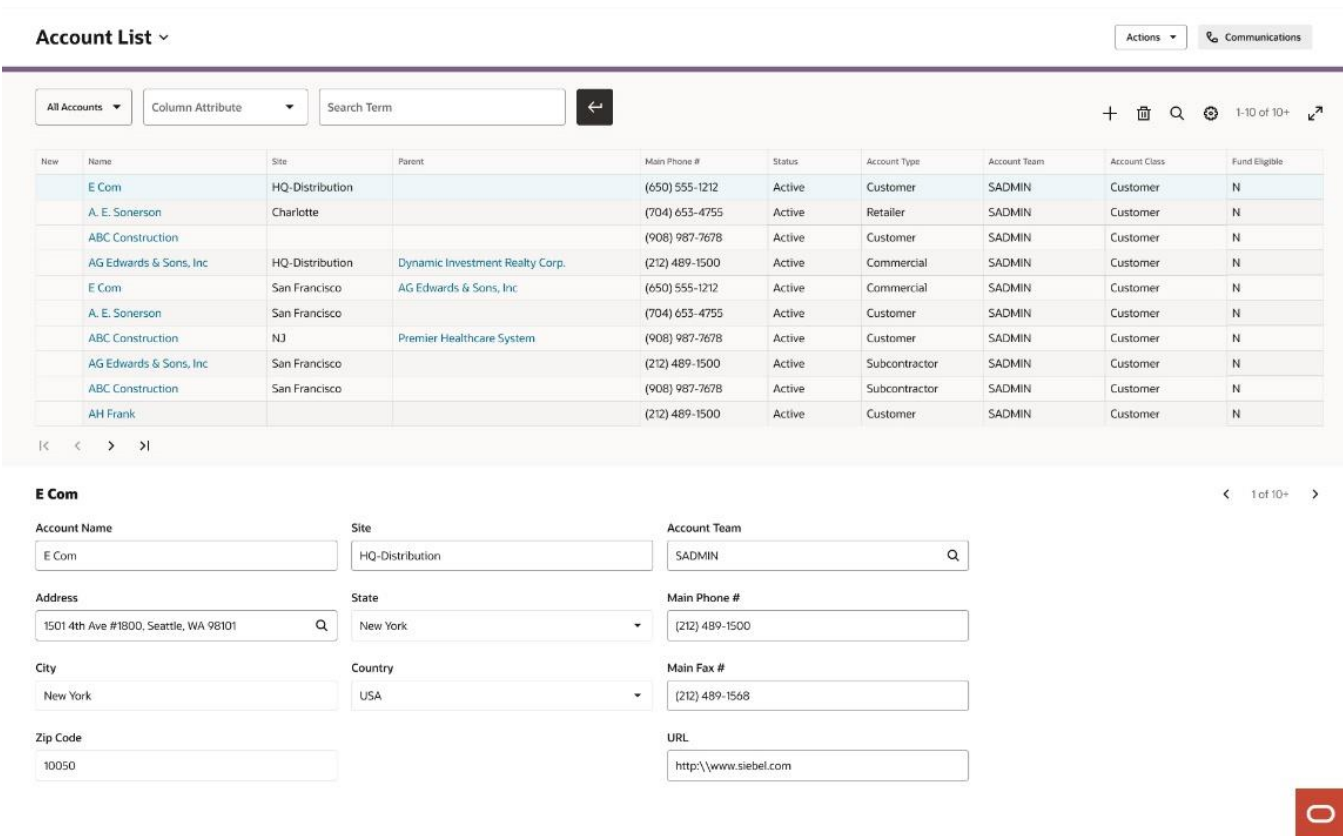


Image 1: Accounts screen with the new Oracle Redwood styling.

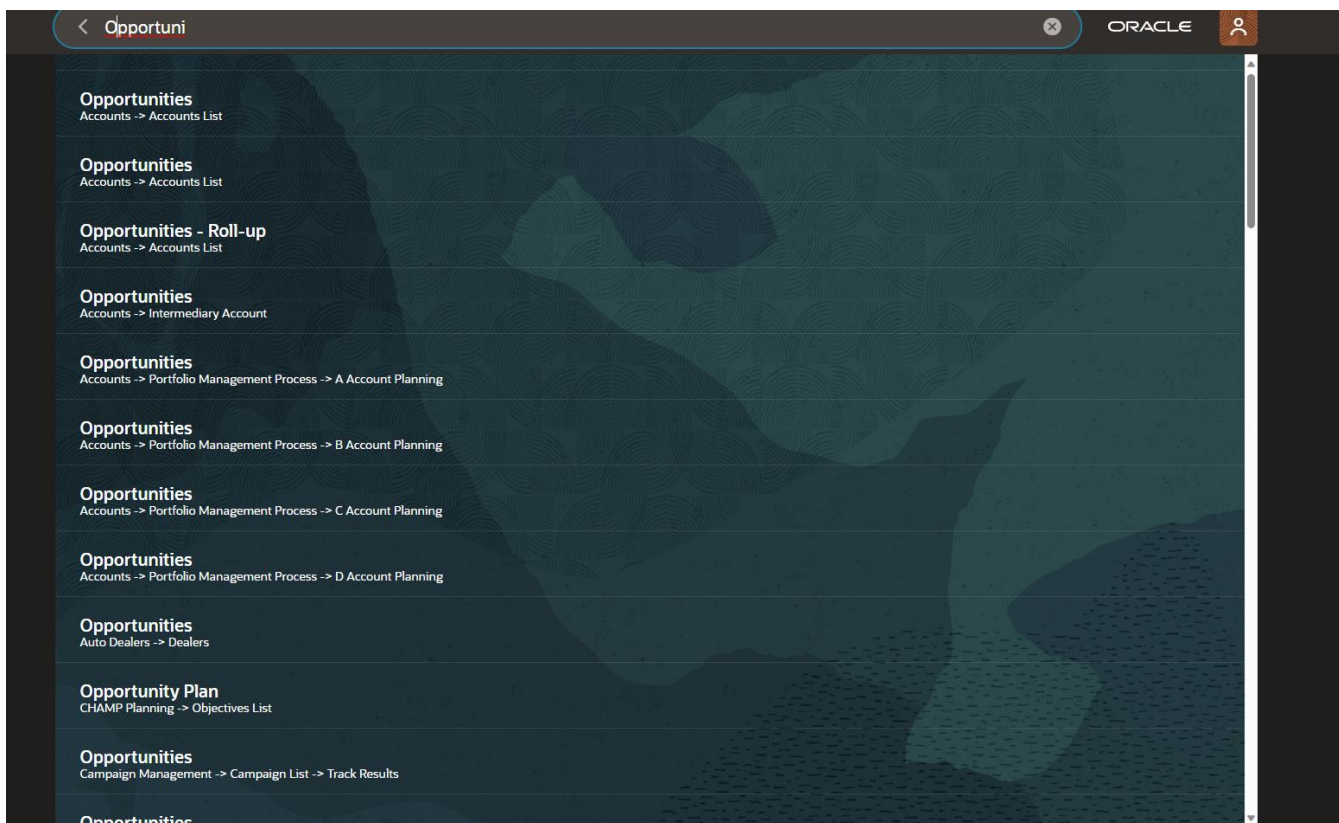


Image 2: Intuitive search across application screens and views.

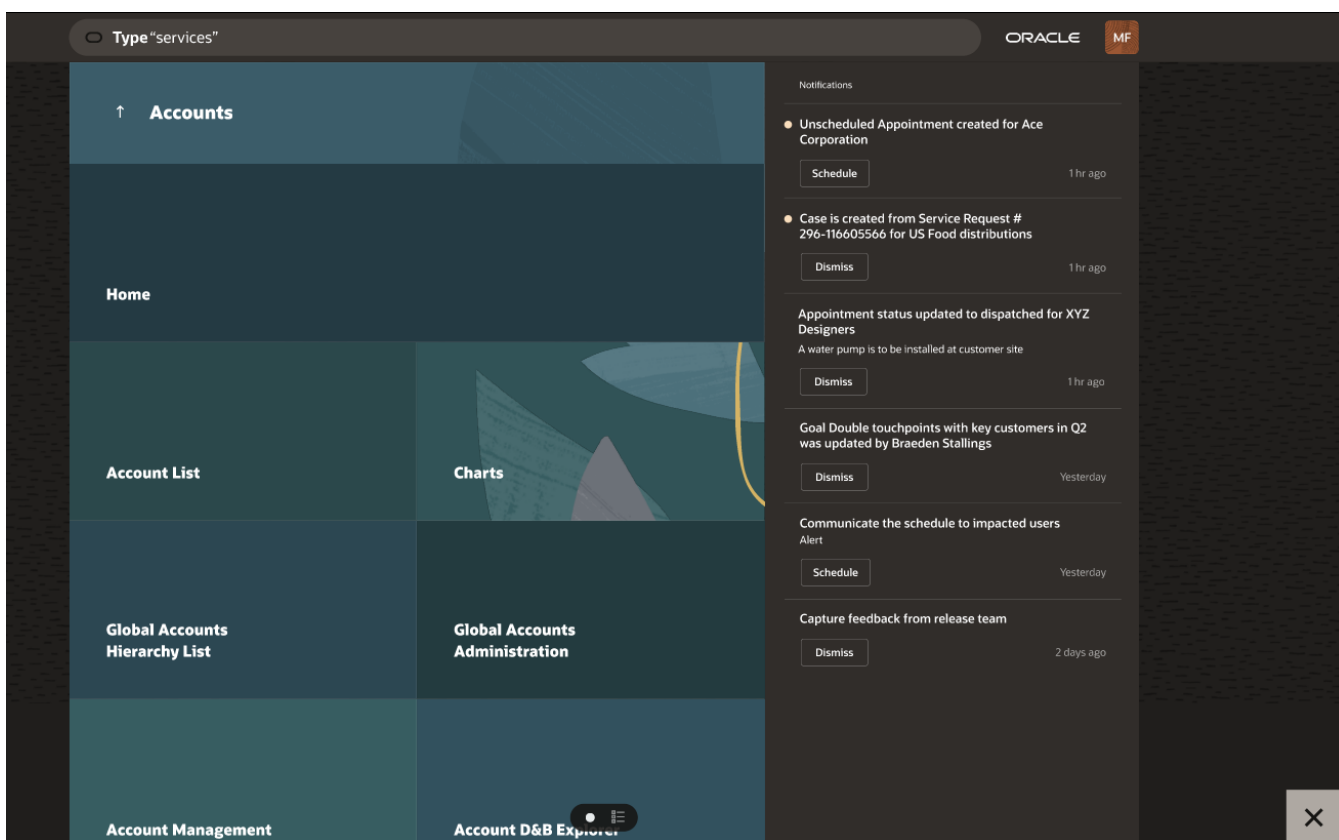


Image 3: “Ask Oracle” new application home and global navigation experience that allows users to access Navigation, Notifications, Search—all in one place.

## Open UI

### Configuring List and Form Applets to display a color based on the value selected

Using the Applet Presentation Model (PM) User Property, you can configure list applet columns or form applet controls to highlight a field with colors based on the value selected. You can add a CSS definition to show the columns or controls in the specified color.

For example, if the Customer Service Center wants to easily highlight customer “sentiment” for Service Requests to assist Service Agents, then this is easily done. Where sentiment is pre-defined - potentially via Oracle AI Services - developers can make a column in a list applet appear in a specific color if the sentiment column has a value positive, negative, or neutral.

This simple feature reduces development and configuration effort, whilst making the UX more intuitive for users.

## Siebel AI Framework for Oracle AI

The Siebel AI framework has been extended to provide the ability to interoperate with prebuilt machine learning AI models including Oracle’s Generative AI services. The new enhancements to the Siebel AI Framework provide organizations a faster route for using the OCI Generative AI service for a variety of use cases.

### Built-in AI capabilities for Siebel Applications

A collection of out-of-the box functional use cases are provided that use the Siebel AI Framework within both user-driven and automated task flows. These use-cases can help to improve productivity, accuracy, and customer experience. Acting as if it were a co-worker or assistant, the standard use case (which can be customized), provides the following functionality:

- **Classification:** Utilize the pre-trained OCI Language AI Service model to classify incoming service requests and auto-populate the Area and Subarea fields that are often used for more efficient routing.
- **Sentiment Analysis:** Use Generative AI to determine the sentiment of all inbound communication so that a Call Center Agent can better understand how a customer is feeling about their current service or product concern.
- **Auto-Summarization:** When closing a Service Request, the Call Center Agent has the option to auto-generate a summary of the Service Request using Generative AI that can be reviewed and revised before sharing with the customer.
- **In-Flight Summarization:** In situations when the Call Center Agent must transfer or collaborate with a subject matter expert (SME) to help resolve a Service Request, a summary can automatically be generated using Generative AI, which will help the SME come up to speed quickly on the issue.

The key benefits and ROI that the built-in AI capabilities provide for the Service use case include:

- Reduce resourcing cost at scale for everyday processes
- Reduce manual errors
- Improve productivity for agents and reduce fatigue
- Provide valuable sentiment insight that allows the agent to improve customer experience
- Save time writing activity summaries for closing or transferring service requests

### Oracle Generative AI - Service Scenario

In this out-of-the-box functional use-case a new Service Request is handled via automation using the Oracle Generative AI Service in the following manner:

1. Automatic SR classification
2. Sentiment Analysis
3. Summarization

#### Enhancements to Existing Integrated AI Services

- Detection of Private Health Information (PHI). This is in addition to Personally Identifiable Information (PII) which is already available out-of-the-box.
- Speech-to-text transcription available for new languages including French, German, Italian, US English, Spanish, and Portuguese; more input formats, including WAV, MP3, OGG, OGA, WEBM, MKV, AC3, AAC, M4A, MP4, FLAC, and AMR
- From 24.10 onwards, the “Whisper” model is the default model for Speech-to-Text transcription. This is a change from the default in previous versions, which was the “Oracle Speech Model”. To revert to the “Oracle Speech Model”, modify the Business Component User Prop modelType to “ORACLE”.

## **Web Tools**

### **Applet Format Toolbar**

This new feature in Web Tools for Form Applets provides the capability to select controls on Form Applets and re-size, move, or align them with just a simple click of a toolbar button saving your developers time and effort. This feature improves the developer experience and provides a more consistent and visually compelling user experience in the application.

### **List and Form Applet Wizards**

New object wizards in Web Tools that allow developers to quickly create List and Form Applets, improving productivity and the developer experience.

## **Siebel Mobile**

### **Automatic Data Synchronization**

This feature allows data synchronization for the mobile user to happen in the background automatically with minimal user intervention. This improves mobile user experience. Some of the salient features are:

- System Administrator can set the frequency for auto-synchronization based on usage patterns.
- Any data created in the offline application will get synchronized automatically as soon as the user goes online.
- The users database gets synchronized automatically when the user is working online ensuring that user always have the latest data, whenever they go offline.
- Automatic Data Synchronization feature comes as part of Siebel Mobile Disconnected.
- Fast performance, since automatic data synchronization applies to incremental data only, the number of transactions created by the user when they were offline isn't likely to be large. In addition, synchronization happens via a separate thread which takes care of synchronization in the background and doesn't affect usability.

### **Mobile Application Framework replaced with React Native**

Siebel Mobile Native Container used by Siebel Mobile is enhanced to use the industry-standard “React Native” platform. The new Siebel CRM container mobile application will be available on both the “Apple App Store” and “Google Play Store”. In addition, the mobile launch and login process for a field user is being enhanced to require

minimal keystrokes to improve usability and speed. Siebel Mobile will continue to support connected and offline users with tablets or smartphones.

## Product Administration

### Purge Old Versions of Products, Classes, and Attributes

This feature provides a Business Service and REST API to enable Product Administrators to purge old versions of products, classes, and attributes easily, whilst retaining a specified number of versions of those objects. Purging old versions simplifies product administration and improves performance.

## Siebel Communications

### Oracle Digital Business Experience (DBE)

DBE is a pre-integrated, end-to-end digital business support system (BSS) that enables organizations to manage customer experiences and revenue throughout the entire customer journey. Key features include:

- A single productized, convergent, and pre-integrated solution for all lines of business
- Unified customer 360 information management
- Improved agent experience through exposed billing and order care capability to CX / CRM
- Business process flow automation across concept-to-cash-to-care
- Rapid time to market with integrated design methodology across enterprise catalog, CX/CRM, billing, inventory, activation, etc.
- Accurate order capture with support for order qualification / feasibility
- Zero orchestration configuration required to launch new offers containing pre-existing products - decoupling "what gets sold" from "how it gets delivered"
- Ability to charge any metric, attribute, and combination of payment options
- Cloud native solution deployable on cloud of choice
- Open, extensible with TMF ODA & Open API standards alignment

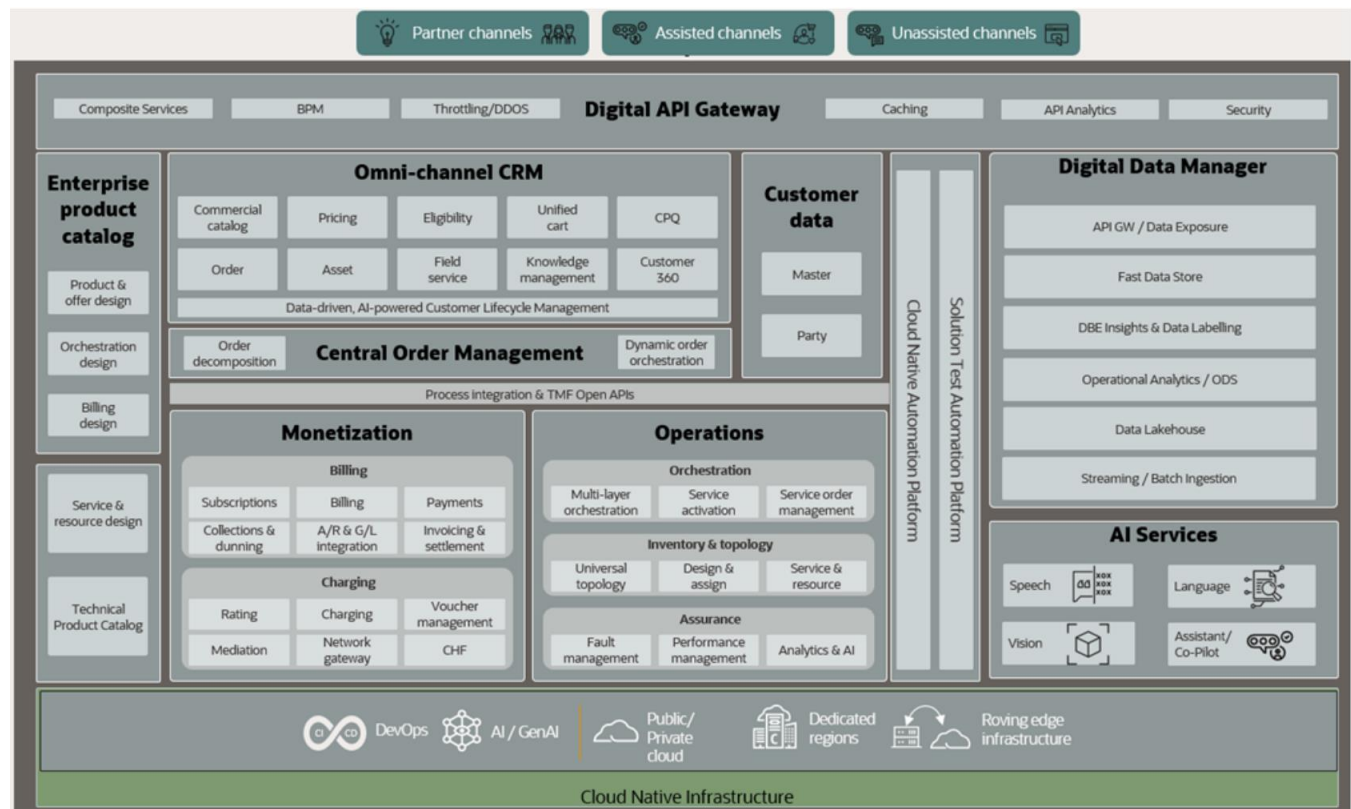


Image 4: “Digital Business Experience Solution Architecture” integration BSS solution for communications with pre-engineered process support across application domains

Intelligence Enabled Catalog

A new easy-to-use enterprise product catalog that enables CSPs to intuitively design complex offers faster. Marketing teams and business users can design new offers and promotions in real-time, independently of IT. The catalog user experience provides guided offer design that empowers IT teams to quickly and accurately define products and services. More of the same services, packages, or offers can be created in just a few clicks by using existing products as building blocks.

During the design process, API-integrated intelligence predicts and optimizes service offers against key performance indicators (KPIs) like profitability and market share.

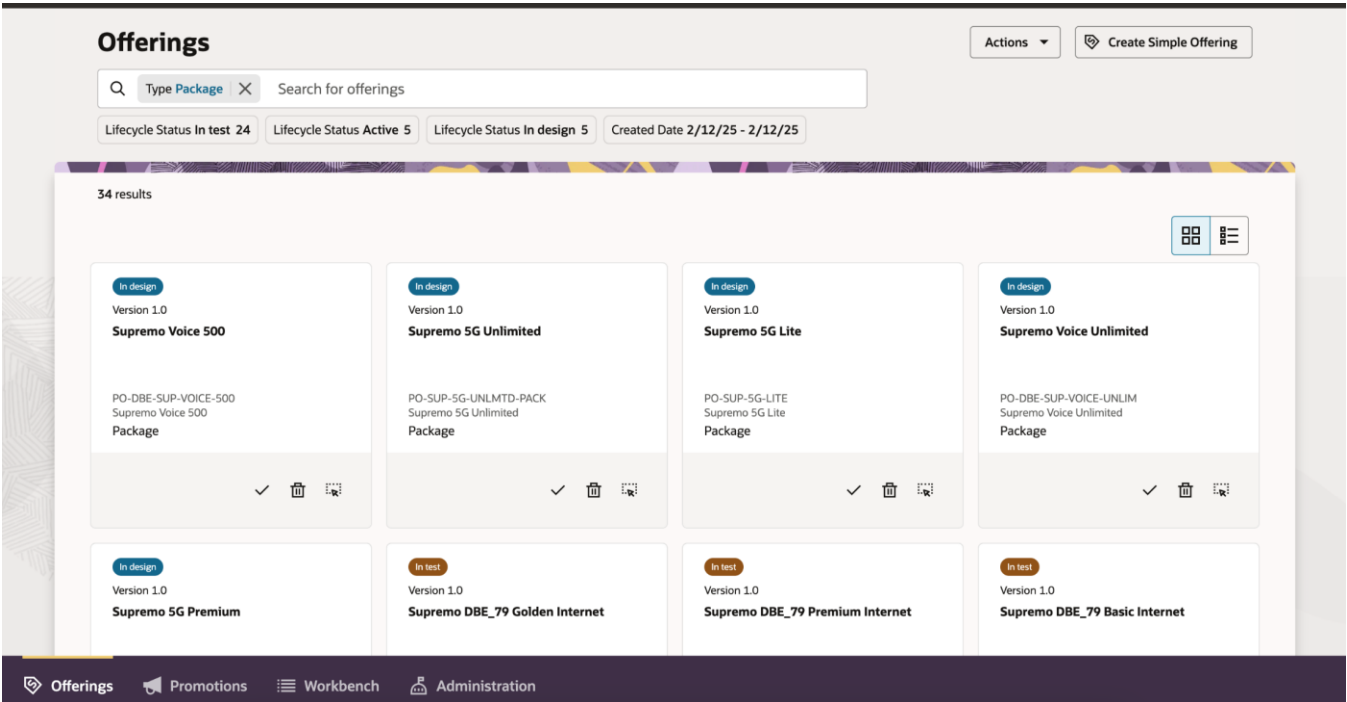


Image 5: “Smart Offer Dashboard” view all your products and services from the offer landing page, utilize smart search to quickly find specific offers, and drill into each offer for more detailed information.

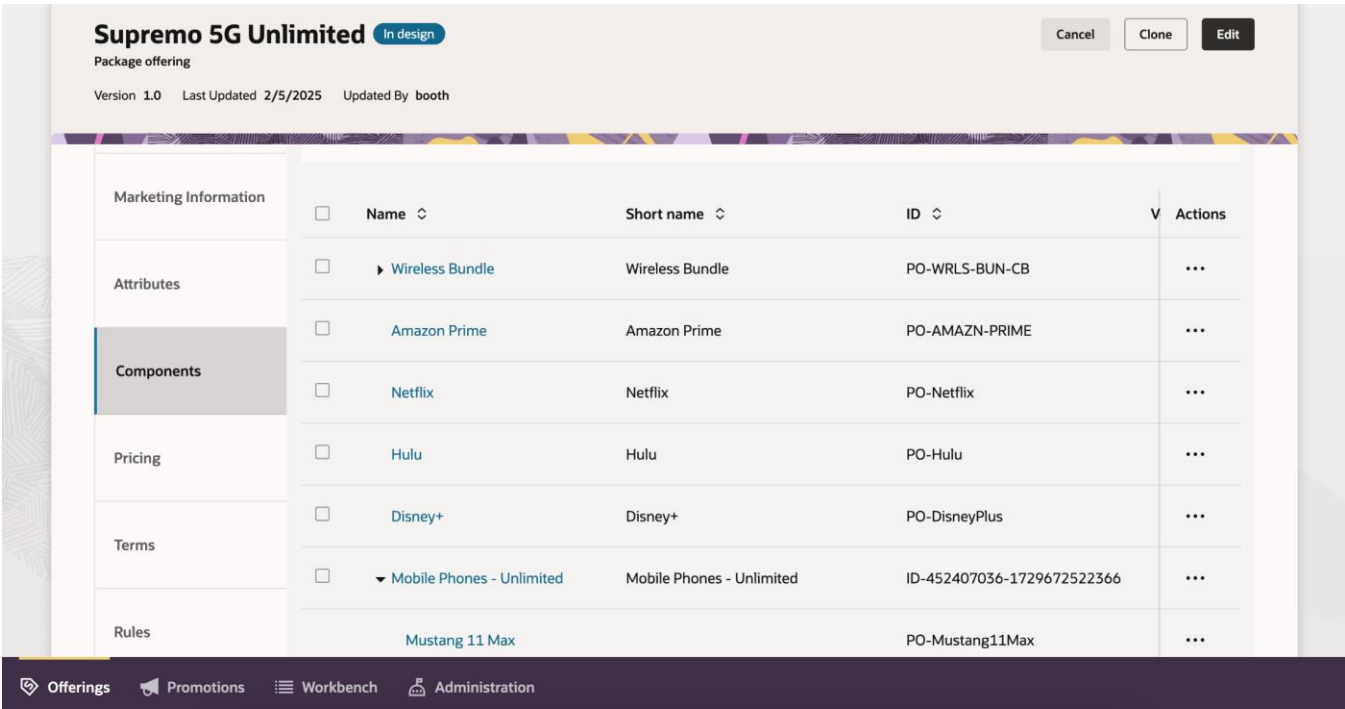


Image 6: “Offer 360” provides a 360 view of product offer, guides users to create and modify offers, and enables one-click cloning to easily replicate similar offerings.

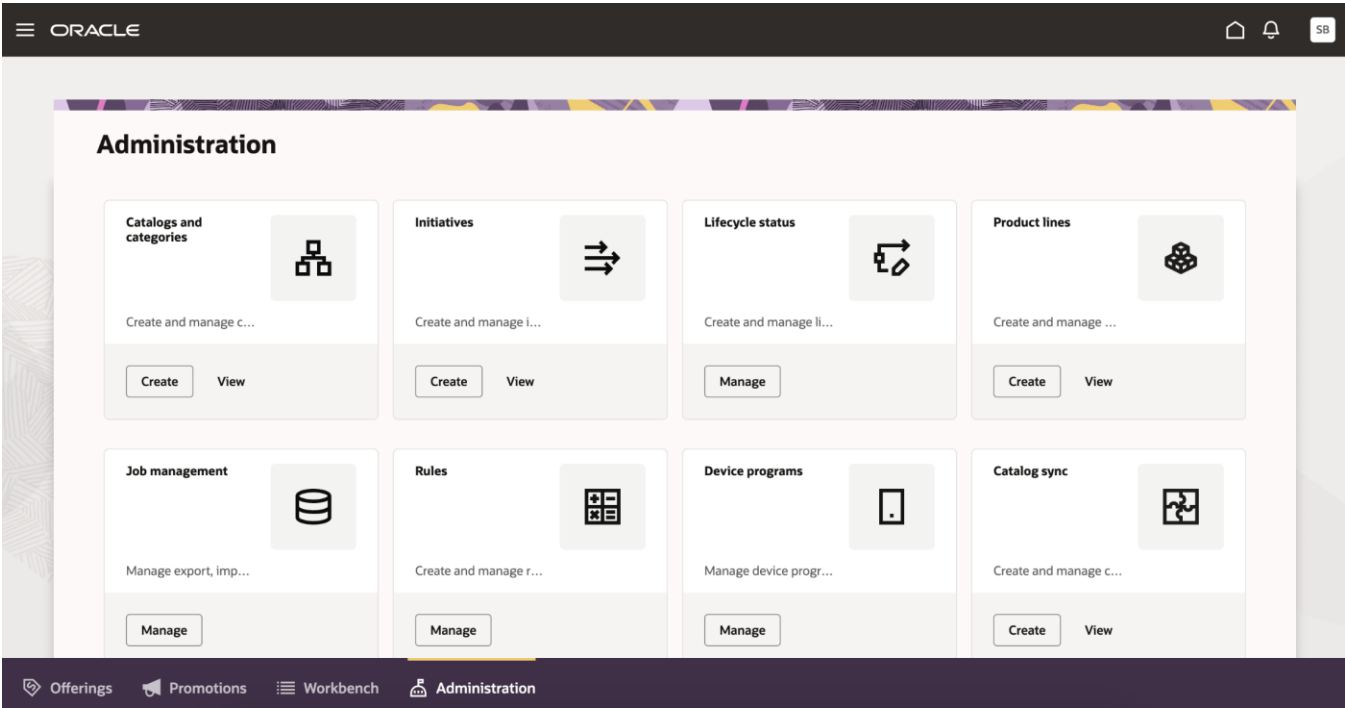


Image 7: “Product Administration” centralized catalog administration to manage all your entities, create reusable building blocks, manage product lifecycle, and publish products.

## Siebel Clinical Trials

### Mobile SmartScript

Siebel Clinical Trials Management System (CTMS) provides Site Visit and Trip Reports functionality to conduct clinical site monitoring as required by industry guidance and regulations. These features are some of the most used features in Siebel CTMS on the desktop or mobile. These new features provide more consistency between CTMS Mobile Site Visits on tablets and the desktop version of Site Visits. The new functionality includes Mobile capabilities, such as support for adding attendees, comments, subject accrual snapshot, as well as SmartScript functionality in trip report questions, and improved navigation for Mobile trip reports.

Due to limited or unreliable Internet/Wi-Fi connectivity in hospitals, medical centers, clinics, doctor's offices, and remote areas where clinical trials may be conducted, Mobile offline capabilities are now available. This enables Clinical Research Associates to complete trip reports in a Mobile offline mode even if there's unreliable connectivity at the site, or the CRA wishes to work on the Trip Report in transit while traveling to/from a clinical site.

### CTMS Integration Logging

Reliable data flow between mission critical clinical systems is crucial for Life Sciences customers to enable real-time updates and decision making. When issues arise with integrations through transmission failures, CTMS admins require easy access to the integration issues to enable rapid resolution.

This feature enables CTMS Administrators, who can set up one or more integrated systems, to have easy and quick access to the logs. By doing this they can easily investigate error scenarios, providing detailed problem statements to Support groups when logging the tickets, ultimately leading to the faster resolution of issues.

### PowerTrials Integration

The integration of Oracle CTMS with PowerTrials provides the best experience for patients, researchers, clinicians, and hospital administration.

Utilizing both integrated systems optimizes study operations, eliminates duplicate data entry and ensures all researchers, clinicians, and hospital administration have visibility to the information they need for patient care and study participant management.

Our goal is to enable healthcare research users to spend less time in front of a computer and more time doing what matters the most: focusing on the patients while enabling research.

## Platform & Operations

The following innovations help to improve Siebel CRM application operations, architecture and reduce TCO.

### Observability - Monitoring and Log Analytics

This feature provides the following capabilities:

- Modern Observability functions of Metrics Monitoring and Logging Analytics to the Siebel CRM application setup on OCI OKE by Siebel Cloud Manager (SCM).
- Alignment of the Siebel CRM architecture closely with cloud native deployment best practices (even in the non-cloud data center). This stack could also be used for dynamic scaling of a Siebel CRM deployment, allow early detection of potential failures (deterministic/AI based/probabilistic/other strategies), and automated corrective actions for large scale deployments.
- The Observability stack uses best of breed tools, including Prometheus, Grafana, Oracle OpenSearch, Fluentd, OCI Services, and others.

### Siebel CRM Event Pub / Sub

#### Enhanced JSON Message Structure for Kafka Integration

This enhancement simplifies the Kafka integration with a JSON message structure sent from Siebel CRM using Runtime Events (RTE). The new structure format is more user-friendly and will provide the following benefits:

- JSON for business entities such as Account, Contacts, and so on.
- Easier processing of messages Intuitive message structure for easier integration
- Improved readability
- Aligned with industry-standard

Also, in both the cases of RTE and Custom Business Service script usage, single instances of child entities (Business Components) will be array members instead of being a JSON object in the payload posted to Kafka from Siebel CRM.

#### Kafka Partition Support

The Siebel CRM Event Pub / Sub functionality has been extended to now include support for Kafka partitions. One of the key benefits of Kafka partitions is to improve the scalability of Kafka usage.

### Siebel Universal Customer Master (UCM)

#### Event Driven Architecture

This new feature for Siebel UCM takes advantage of the Siebel CRM Event Pub / Sub framework for event-driven communications between Siebel CRM and external systems. This allows event publishing to and consuming from Kafka for various use cases in a typical Siebel UCM implementation.

Kafka is a distributed event store and stream-processing platform used widely in the industry because it is scalable, fast, and fail-safe. By providing an integration with Kafka for Siebel UCM, integration and maintenance effort with external systems will be simplified.

The supported use cases for the Kafka integration are Insert, Update, and Delete request events for Account, Contact, Household, and Financial Account objects. Data Steward actions, including Link & Update, Create New, and Merge events, are also available for publication to Kafka.

## Siebel Test Automation

### Conditional Expression for Test Steps

Enhancements to the OpenUI Test Automation functionality, specifically for runtime control and reuse, are extended with the addition of conditional expressions for Test Steps.

It is now possible to add a conditional expression to individual Test Steps, which get evaluated at run time. As a result, this determines which Test Steps are therefore executed during the run time, of Test Script execution. This provides much greater flexibility and re-use for Test Scripts e.g.:

- Fewer Test Scripts need to be created since they can be made dynamic with conditional expressions
- It is possible to run the same Test Script across different test environments without having to maintain a separate Test Script for each
- Reduced Test Script creation, leads to improve productivity and efficiency

## Upgrade Factory 2.0

New features include:

- **Production Upgrades** – It is now possible to leverage the Upgrade Factory for non-Development upgrades
- **Scope Extension** – Upgrade Factory can now be used to upgrade environments going back to 7.8.2 (previously, only 8.0 and later were supported)
- **Performance Improvements** – Both Schema and Data Migration scripts are executed in parallel, increasing the performance of the upgrade
- **Pre-Assessment Report** – Summarizes critical conflicts and schema changes before performing the upgrade
- **Observability & Monitoring** – Provides for rapid detection and evaluation of upgrade-related issues
- **Language Support** – all 22 shipped languages are supported.

If you are still on an older version of Siebel CRM, it is essential to get upto date! the Upgrade Factory provides a perfect starting point to begin your one-time Upgrade project. Using the Upgrade Factory 2.0 will help save time and cost.

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