Siebel

Mobile Guide: Connected

October 2026

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In addition to the resources available in Oracle Help Center, you can explore training, connect with the Oracle community, and share your feedback.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 What's New in This Release

What’s New in This Release

This chapter tracks the changes in the documentation.

It includes these topics:

- *What’s New in Siebel Mobile Guide: Connected, Siebel CRM 26.8 Update*
- *What’s New in Siebel Mobile Guide: Connected, Siebel CRM 26.1 Update*
- *What’s New in Siebel Mobile Guide: Connected, Siebel CRM 24.8 Update*
- *What’s New in Siebel Mobile Guide: Connected, Siebel CRM 24.1 Update*
- *What’s New in Siebel Mobile Guide: Connected, Siebel CRM 22.4 Update*
- *What’s New in Siebel Mobile Guide: Connected, Siebel CRM 21.7 Update*
- *What’s New in Siebel Mobile Guide: Connected, Siebel CRM 21.6 Update*

What’s New in Siebel Mobile Guide: Connected, Siebel CRM 26.8 Update

This table lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Enhanced Smartphone UX for Siebel Mobile	New topic. Explains how to enable and use the Redwood-aligned Smartphone UX PHONE theme for Siebel Mobile applications.

What’s New in Siebel Mobile Guide: Connected, Siebel CRM 26.1 Update

This table lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
About the Siebel Redwood UI Theme	New topic. Describes Redwood Theme UI.

What’s New in Siebel Mobile Guide: Connected, Siebel CRM 24.8 Update

This table lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Application Logging for Siebel Mobile	Modified topic. Updated with new topics regarding Log information.

What's New in Siebel Mobile Guide: Connected, Siebel CRM 24.1 Update

This table lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Replacement of Mobile Application Framework (MAF) with React Native (RN)	Modified topic. Mobile Application Framework (MAF) has been replaced with React Native (RN) version 0.71.3

What's New in Siebel Mobile Guide: Connected, Siebel CRM 22.4 Update

This table lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
About the Siebel App, Siebel.maa File, and Mobile Application Framework	Modified topic. Mobile Application Framework (MAF) has been upgraded to version 2.6.5.
Overview of This Chapter	New chapter: Chapter 11, Using Embedded Interviews for Siebel Mobile Application for Siebel Financial Services. Added information about DIV-based embedded interviews for the Siebel Mobile application for Siebel Financial Services. This Oracle Intelligent Advisor integration feature is available as of Siebel CRM 22.4 Update.

What's New in Siebel Mobile Guide: Connected, Siebel CRM 21.7 Update

This table lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
About the Siebel App, Siebel.maa File, and Mobile Application Framework	Modified topic. Mobile Application Framework (MAF) has been upgraded (to version 2.6.4).

What's New in Siebel Mobile Guide: Connected, Siebel CRM 21.6 Update

This table lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Set the Server Uncompression Location	Modified topics. As of Siebel CRM 21.2 Update, the **`applicationcontainer`** directory has been replaced by two directories, as follows: • **`applicationcontainer_external`** (for Siebel Application Interface) • **`applicationcontainer_internal`** (for all other Siebel Enterprise components) In the Siebel Application Interface installation, web artifacts for application configurations, which were formerly located in **`applicationcontainer\webapps\siebel`**, now map to

Topic	Description
	applicationcontainer_external\siebelwebroot. This directory contains subdirectories such as **files**, **fonts**, **htmltemplates**, **images**, **migration**, **scripts**, and **smc**. For more information, see the *Siebel Installation Guide*.

2 Overview of Siebel Mobile

Overview of This Chapter

This chapter introduces Oracle's Siebel Mobile product.

It contains these topics:

- *Overview of Siebel Mobile*
- *Siebel Mobile Products*
- *Requirements for Using Siebel Mobile*
- *System Requirements for Siebel Mobile*
- *Print Capability Uses MIT License*
- *Siebel Mobile Sync (Disconnected Only)*

Overview of Siebel Mobile

Siebel Mobile apps let you access Siebel CRM information with your mobile device in real-time by. Using Siebel Mobile, you can access app-based versions of these Siebel Business Applications on your mobile device:

- Siebel Pharma
- Siebel Sales
- Siebel Field Service
- Siebel Financial Services
- Siebel Clinical

Siebel Mobile Products lists the applications that are supported in connected (online) mode and disconnected (offline) mode.

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's designed to simplify client-side scripting that uses 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 devices 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 lets you 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.

Siebel Mobile Products

The Siebel CRM product line features several mobile applications. Each app serves a different purpose and runs on different devices. Often, these applications complement each other.

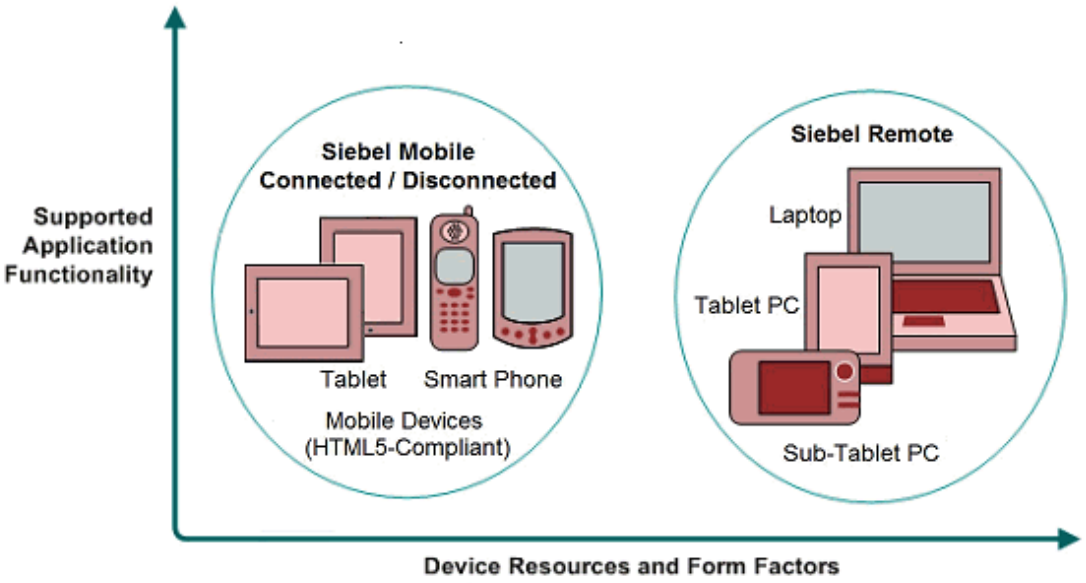
Here's a summary of Siebel Mobile applications, along with the supported server and client components and system:

Product Group	Server Component	Client Component	Supported System
Siebel Mobile Connected	Siebel Mobile application in online mode (connected to Siebel Server).	Siebel application	• iOS operating system • Android™ operating system™
Siebel Mobile Disconnected	Siebel Mobile application in offline mode (disconnected from Siebel Server). Synchronization Object Manager	Siebel application	• iOS operating system • Android™ operating system
Siebel Remote	Siebel Remote component group Disconnected Mobile Synchronization component group	Siebel Mobile Web Client Note that Siebel Mobile connected and disconnected aren't related to the Siebel Mobile Web Client in any way.	Microsoft Windows only: • Desktop PC • Laptop • Tablet

Note: You can find platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

This image illustrates the hardware platforms where these products run. "Form factors" in the image refers to the general capabilities, screen shapes, and sizes of the various devices shown in the illustration.

- Siebel Mobile applications are supported on iOS (Apple iPad or Apple iPhone) and Android™ operating system (Samsung Galaxy tablet or smartphone) devices.
- Siebel Remote applications are supported on Microsoft Windows desktops, laptops, tablets, and subtablets.



Siebel Mobile Connected Applications

This category of Siebel Mobile apps includes Siebel Business Applications accessed from a Siebel app downloaded from the Apple App Store or Google Play. This offering from Oracle provides access to Siebel Business Applications, with its native look-and-feel, from tablets and smartphones.

Siebel supports Responsive Web Design, so any Siebel desktop application will work from any device. Siebel supports these Siebel Mobile connected apps:

- Siebel Pharma
- Siebel Sales
- Siebel Field Service
- Siebel Financial Services
- Siebel Clinical

For more information, see:

- *Siebel Mobile Guide: Connected* and *Siebel Mobile Guide: Disconnected*, as appropriate
- *Configuring Siebel Open UI*
- *Siebel Installation Guide*

Note: The Siebel Mobile connected app isn't supported on client browsers.

Siebel Mobile Disconnected Applications

This category of Siebel Mobile apps includes Siebel Business Applications accessed from a Siebel app downloaded from the Apple App Store or Google Play. This offering from Oracle provides access to Siebel Business Applications, with its native look-and-feel, from tablets and smartphones.

Siebel supports these Siebel Mobile disconnected apps:

- Siebel Field Service
- Siebel Sales
- Siebel Clinical
- Siebel Pharma

For more information, see:

- *Siebel Mobile Guide: Connected* or *Siebel Mobile Guide: Disconnected*, as appropriate
- *Configuring Siebel Open UI*
- *Siebel Installation Guide*

Note: Siebel Mobile disconnected isn't supported on client browsers.

Siebel Remote and Siebel Mobile Web Client

Siebel Remote lets the Siebel Mobile Web Client run remotely while disconnected. It syncs data that resides on a remote computer with the data that resides on the Siebel Server. Together, these applications provide intelligent transaction routing and data syncing.

These applications support most Siebel Business Applications and Siebel Industry Applications, with the same look-and-feel as those applications.

Note: Siebel Remote works only on Microsoft Windows-based desktops, laptops, and tablets.

See the *Siebel Remote and Replication Manager Administration Guide* for more information.

Requirements for Using Siebel Mobile

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

- You must have the latest supported iOS or Android mobile device (tablet ors smartphone) with an internet connection.
- The browser on your mobile device must support the following: HTML5 and CSS 3.0 or higher.
- You've downloaded the Siebel app from Google Play or the archive (SiebelMobile.zip) file from the Siebel Tools installed home directory. For iOS platform, always use the archive file, because the customer domain name needs to be added. Open a service request if you need more details.
- You've reviewed topics about Siebel and Siebel Mobile in the *Siebel Installation Guide*.

- If you're running Siebel Mobile disconnected on your mobile device, ensure that you've enough main memory on it.
- Make sure that you've enough RAM available for use with Siebel Mobile. Ensure that your mobile device has a physical RAM of 4 GB or higher.
- We recommend that you use Oracle Advanced Customer Support (ACS) services for fine tuning your environment for the disconnected mobile application.

System Requirements for Siebel Mobile

Siebel Mobile runs on iOS and Android™ operating system devices with the latest operating system updates, including:

- Apple iOS devices: iPad tablet and iPhone smartphone.
- Android™ devices: Industry standard Android tablet and smartphone. For example, Samsung Galaxy.

Oracle supports the devices that Siebel Mobile runs on, but doesn't certify any specific device models.

Note: You can find platform, database, and other certifications for Siebel on My Oracle Support. For help searching for certifications, see How to Check the Certification Matrix in the New My Oracle Support Site (*KB871388*).

Print Capability Uses MIT License

The print capability in Siebel Mobile, which is available in the Siebel Mobile app for Siebel Field Service, is built using third-party, open source, embedded JavaScript 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:
This copyright notice and 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.
================================================================================
```

For more information about printing invoices, see:

- *Print an Invoice for an Activity*
- *Print Invoices Associated with a Service Request*
- *Print an Invoice*

Siebel Mobile Sync (Disconnected Only)

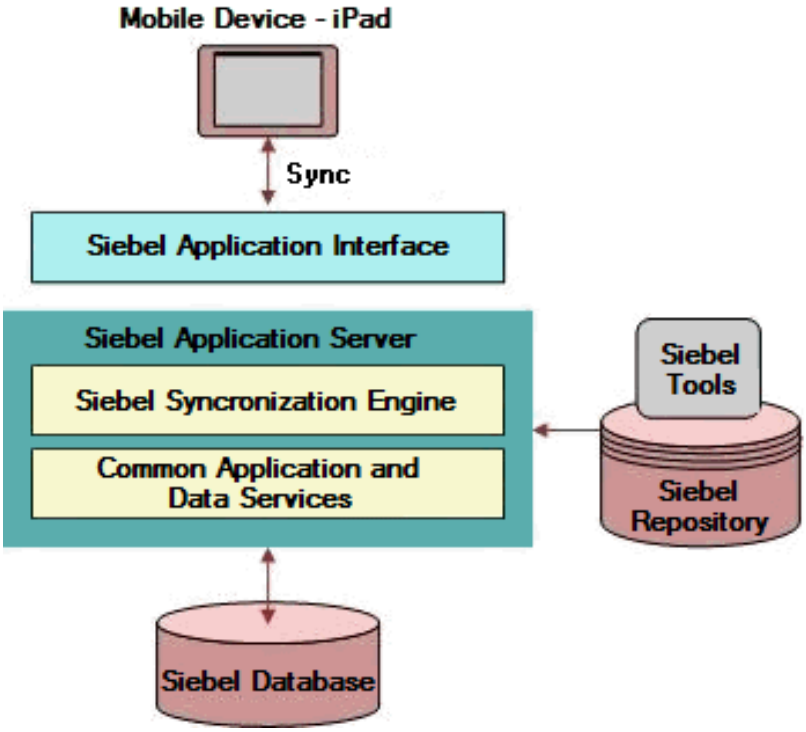
The Siebel Synchronization Server component, which runs on the Siebel application server, can accept concurrent sync requests from multiple sync clients.

Note: This topic applies only to Siebel Mobile disconnected applications.

The Siebel Synchronization Server component in this instance is the Siebel Application Object Manager for the Siebel Mobile disconnected application, which can be one of the following for example: ePharmamObjMgr_enu or ServicemObjMgr_enu. For more information about object managers for Siebel Mobile disconnected applications, see *Add Object Managers for Siebel Mobile*.

This image illustrates the synchronization infrastructure for Siebel Mobile disconnected applications:

- The Siebel Synchronization Engine and the Common Application and Data Services reside on the Siebel Server.
- The Siebel Database, Siebel Repository, and Siebel Tools communicate with the Siebel Application Server.



3 Setting Up Siebel Mobile

Overview of This Chapter

This chapter describes how to set up the Siebel Mobile connected application.

It includes these topics:

- *Overview of Setting Up Siebel Mobile Connected Applications*
- *Prerequisites for Setting Up Siebel Mobile*
- *Add Object Managers for Siebel Mobile*
- *Set Object Manager Parameters for Siebel Mobile*
- *Enable Component Groups for Siebel Mobile*
- *Assign Responsibilities to Siebel Mobile Users*
- *Customize Siebel Mobile Applications*
- *Copy and Delete Siebel Mobile Applications*
- *Logging Errors (Disconnected)*

Note: The procedures in this guide assume that you don't use the Tree navigation control option to access screens and views. However, you can decide to use the Tree navigation control if needed. For more information about setting navigation options, see *Siebel Fundamentals Guide* .

Overview of Setting Up Siebel Mobile Connected Applications

To set up Siebel Mobile connected applications:

1. *Prerequisites for Setting Up Siebel Mobile*
2. *Add Object Managers for Siebel Mobile*
3. *Set Object Manager Parameters for Siebel Mobile*
4. *Enable Component Groups for Siebel Mobile*
5. *Assign Responsibilities to Siebel Mobile Users*
6. *Customize Siebel Mobile Applications*

Prerequisites for Setting Up Siebel Mobile

Before starting to set up Siebel Mobile applications, you must meet these requirements:

1. You have the installed software for Siebel Mobile is Siebel CRM 24.1 or later.

For new or existing installations, install the latest Siebel CRM Update. For more information about new installations and migration installations for existing installations, see the *Siebel Installation Guide*.

2. For a migration of an existing installation, run the Siebel Incremental Repository Merge to update your database to the latest Siebel CRM.

   See *Performing a Siebel Incremental Repository Merge* in the *Siebel Database Upgrade Guide* for more information.

   For new installations, running Siebel Incremental Repository Merge isn't required. Install a new Siebel database for Siebel CRM.
3. All standard Siebel Server and Siebel Application Interface configurations have been carried out before you run any Siebel Mobile script on the Siebel Server and Siebel Application Interface.
   - **New installations.** Complete the standard Siebel Server and Siebel Application Interface installation and configuration tasks to create the object managers for the language or languages that you choose to deploy.
   - **Migration installations.** Run the script to add the object managers for new Siebel Mobile 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're deploying. After installation, run the Siebel Management Console and configure the Application Interface to add the new applications.
   - **Additional languages.** After a migration installation, run the object manager script once for each installed language. If you're adding a new language to an existing installation, then run the object manager script 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*.

> **Note:** The Siebel Bookshelf is available on *Oracle Help Center's Siebel pages*. It might also be installed locally on your intranet or on a network location.

Add Object Managers for Siebel Mobile

Adding Siebel Application Object Managers is different depending on whether you have a new installation or are migrating from an existing installation.

Considerations for New Siebel Mobile Object Manager Installations

Siebel Application Object Managers are created by default in the languages selected during the Siebel CRM installation. For example, if the implementor selected ENU and ESP as the languages, then the object managers shown in the following table are automatically added for ENU and ESP. So, you don't need to add them again.

To run your Siebel Mobile application later in a new language, then you must run the `new_compdef_sia` script for each language to be supported, but only after first completing all the standard tasks to install and deploy a new language.

Application	Application Object Manager
Siebel Mobile application for Siebel Pharma	ePharmamObjMgr_enu ePharmamObjMgr_esp

Application	Application Object Manager
Siebel Mobile application for Siebel Sales	SalesmObjMgr_enu SalesmObjMgr_esp
Siebel Mobile application for Siebel Field Service	ServicemObjMgr_enu ServicemObjMgr_esp
Siebel Mobile application for Siebel Financial Services	FinsmObjMgr_enu FinsmObjMgr_esp
Siebel Mobile application for Siebel Clinical	eClinicalMObjMgr_enu eClinicalMObjMgr_esp

Considerations for Migrated Siebel Mobile Object Manager Installations

You must run the new_compdef_sia script to add the object managers for new Siebel Mobile applications not present in any prior installation, for each language that's installed and deployed on the Siebel Server.

What You Must Do 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.

For more information about new installations, migration installations, and additional language installations, including the standard tasks to install and deploy a new language, see the *Siebel Installation Guide*.

Add Object Managers for Siebel Mobile

> **Note:** You perform the following procedure only for migration installations to add the object managers for new Siebel Mobile applications not present in any prior installation.

Here's how to run the `new_compdef_sia` script to add new object managers for Siebel Mobile. Running the script adds the object managers for the applications that are in the HandheldSync and HandheldSyncSIS component groups.

1. Stop the Siebel Server.
2. Stop the Siebel Gateway and make a backup of the Siebel Gateway registry.

   For instructions about how to do this type of backup, see the *Siebel System Administration Guide*.
3. Restart the Siebel Gateway.
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. Run one of the commands shown in this table, as needed:

Operating System	Command
Microsoft Windows	Run this command: `new_compdef_sia.bat <GATEWAY>:<PORT> <ENTERPRISE> <USERNAME> <PASSWORD> <LANG>`
Linux or UNIX	Run this command: `new_compdef_sia.ksh <GATEWAY>:<PORT> <ENTERPRISE> <USERNAME> <PASSWORD> <LANG>`

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 *Enable Component Groups for Siebel Mobile*.

Related Topics

- Set Object Manager Parameters for Siebel Mobile

Set Object Manager Parameters for Siebel Mobile

You must set Siebel Application Object Manager parameters on every Siebel Server that supports Siebel Mobile, and for each supported language.

These Siebel Application Object Manager parameters settings are set by default and are required:

Parameter Name	Parameter Setting
AppletSelectStyle	AppletSelectStyle="Applet Select"
EnableInlineForList	EnableInlineForList=Never
ShowWriteRecord	ShowWriteRecord=TRUE
(Disconnected only) EnableOfflineMode	EnableOfflineMode=True

For more information about Siebel Application Object Manager parameters and the Siebel Server Manager, see the *Siebel System Administration Guide*. For more information about enabling Siebel Open UI for Siebel Application Object Managers, see the *Siebel Installation Guide*.

(Disconnected Only) Set EnableOfflineMode

For Siebel Mobile disconnected, you must set the EnableOfflineMode application object manager parameter to TRUE to enable offline mode for these applications:

- Siebel Mobile disconnected application for Siebel Pharma
- Siebel Mobile disconnected application for Siebel Sales
- Siebel Mobile disconnected application for Siebel Field Service
- Siebel Mobile disconnected application for Siebel Clinical

EnableOfflineMode is set to FALSE by default. Before you can work in offline mode, you must enable offline mode as follows:

1. Sign in to the srvrmgr.
2. Enter this command at the srvrmgr command line for **each mobile application in the appropriate language**:

   For U.S. English, for example, type:

   ```
   change param EnableOfflineMode=True for comp XObjMgr_enu
   ```

   For each language that you want to set up for your mobile application, substitute the language in question for `_enu` and replace XObjmgr with the name of the application object manager (as shown in the previous table). For example, use `_esp` to enter the command for the Spanish language on ePharmamObjMgr like this:

   ```
   change param EnableOfflineMode=TRUE for comp ePharmamObjMgr_esp
   ```

Enable Component Groups for Siebel Mobile

The component groups for Siebel Mobile must be enabled on the supported Siebel Server.

You can enable the component groups for these Siebel Mobile applications on Microsoft Windows or on UNIX:

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

Enable Component Groups for Siebel Mobile

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

      These component groups are returned:

- HandheldSync
- HandheldSyncSIS

c. For each of these component groups, do this:
   - Select the component group, and then select the **Enable** button.
   - In the Component Group Assignments applet, select the **Enable** button for the required Siebel Server.

d. If required, go to the LifeSciences component group, and enable it as described in the previous substep.

2. Stop, and then restart the Siebel Server.

Assign Responsibilities to Siebel Mobile Users

A responsibility corresponds to a set of views. Responsibilities control the views that users have access to. This procedure shows you how to assign views to a responsibility and then users to that responsibility.

1. Sign 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 this:
   a. In the Users applet, add users to the responsibility as required.
   b. In the Views applet, add the appropriate views to the responsibility as required.

Default Views for the Siebel Mobile Application for Siebel Pharma

Here are the application views that are added by default as part of the predefined data for the Siebel Mobile application for Siebel Pharma. You don't need to manually add these views.

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

Default Views for the Siebel Mobile Application for Siebel Sales

Here are the application views that are added by default as part of the predefined data for the Siebel Mobile application for Siebel Sales. You don't need to manually add these views.

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

Default Views for the Siebel Mobile Application for Siebel Field Service

Here are the application views that are added by default as part of the predefined data for the Siebel Mobile application for Siebel Field Service. You don't need to manually add these views.

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

Default Views for the Siebel Mobile Application for Siebel Financial Services

Here are the application views that are added by default as part of the predefined data for the Siebel Mobile application for Siebel Financial Services. You don't need to manually add these views.

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

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

Default Views for the Siebel Mobile Application for Siebel Clinical

Here are the application views that are added by default as part of the predefined data for the Siebel Mobile application for Siebel Clinical. You don't need to manually add these views.

LS Clinical My Site Visits View - Mobile

LS Clinical Protocol Site List View - Mobile

For more information about setting up view access and users for Siebel Mobile disconnected, see *Set Up Selective Retrieval for Siebel Mobile Application Views* and *Set Up Users for Siebel Mobile*.

Customize Siebel Mobile Applications

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.

These 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 Route (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* .

Copy and Delete Siebel Mobile Applications

You can copy the mobile application and delete duplicate copies of mobile applications in Siebel CRM as shown in the following procedure.

> **Note:** 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 application, the application plus all the associated child business component records are deleted.
- Before deleting a mobile application, it's recommended that you make a copy of it first.

> **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* .

Copy and Delete Mobile Applications in Siebel CRM

1. Sign 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 upper 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 don't delete any Siebel-provided applications:
   a. Select an application from the upper 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.

Common Errors in Siebel Mobile Connected

The following tables highlight some common errors that users might encounter when trying to access and use Siebel Mobile connected applications on their mobile device.

Error 1

Item	Description
Problem	If you get errors similar to the following: `If you get errors similar to the following: Tag: swe:nav-control is not valid in this context. . . . Error creating Parameter:MobileApplication for Comp:ePharmaMObjMgr_ENU @ in CompGroup:HandheldSyncSIS Strict Flag set to FALSE, continuing with the next Object...`
Cause	The mobile application is not rendering correctly.
Solution	Make sure that the Siebel Application Object Manager parameters are configured correctly for your Siebel Mobile application. To set the parameters again, run the srvrmgr command for your Siebel Application Object Manager. For more information, see *Set Object Manager Parameters for Siebel Mobile*.

Error 2

Item	Description
Problem	An error message similar to the following appears after selecting a value from a drop-down list: `The applet field with name " . . . " does not exist (SBL-UIF-00289)`
Cause	The User Agent settings for the web browser are incorrect.
Solution	The steps to modify the User Agent settings for the web browser are: 1. Log in to the Siebel Business Application. 2. Navigate to the Administration - Web Browser screen, then the Browsers view. 3. Create a new browser by entering the browser name and version. 4. Add the capabilities for the new browser. For example: `User-Agent = Mozilla/4.0 (compatible; <browsername&version> Parent = <browsenamer&version> Accept = image/gif, image/x-xbitmap, image/jpeg, image/pjpeg, application/vnd.ms-powerpoint, application/vnd.ms-excel, application/msword, */* JumpTab = True` **Note:** Although the User-Agent value looks incomplete without a closing parenthesis, this is the correct value.

Item	Description
	• After applying these Siebel client parameters, restart the Siebel Mobile application. No browser errors will be returned, no matter which parameters are set on the browser side.

4 Getting Started with Siebel Mobile Applications

Overview of This Chapter

This chapter describes how to get started with Siebel Mobile applications, and the common procedures that you can run in online (connected) mode in all applications.

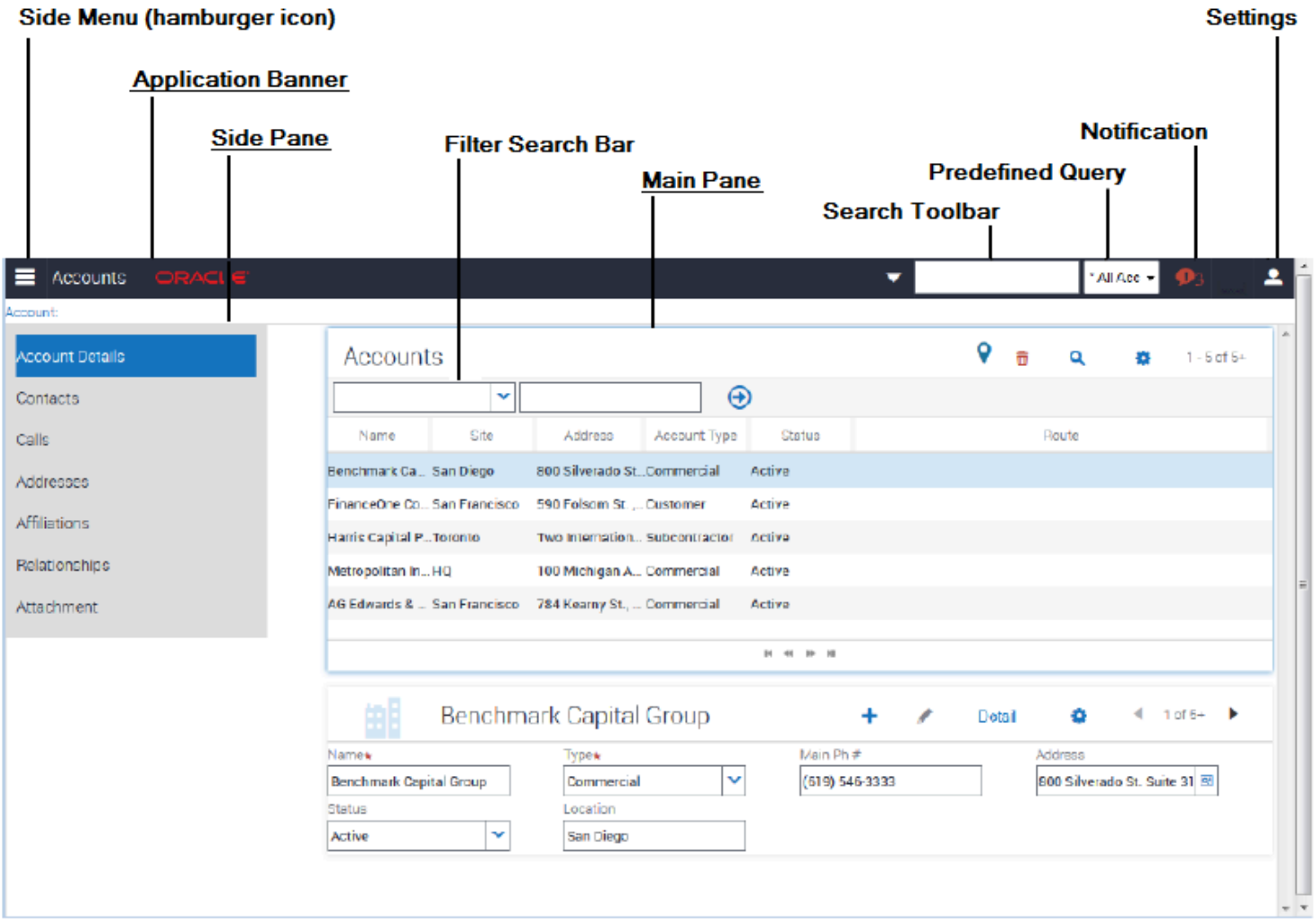
It includes these topics:

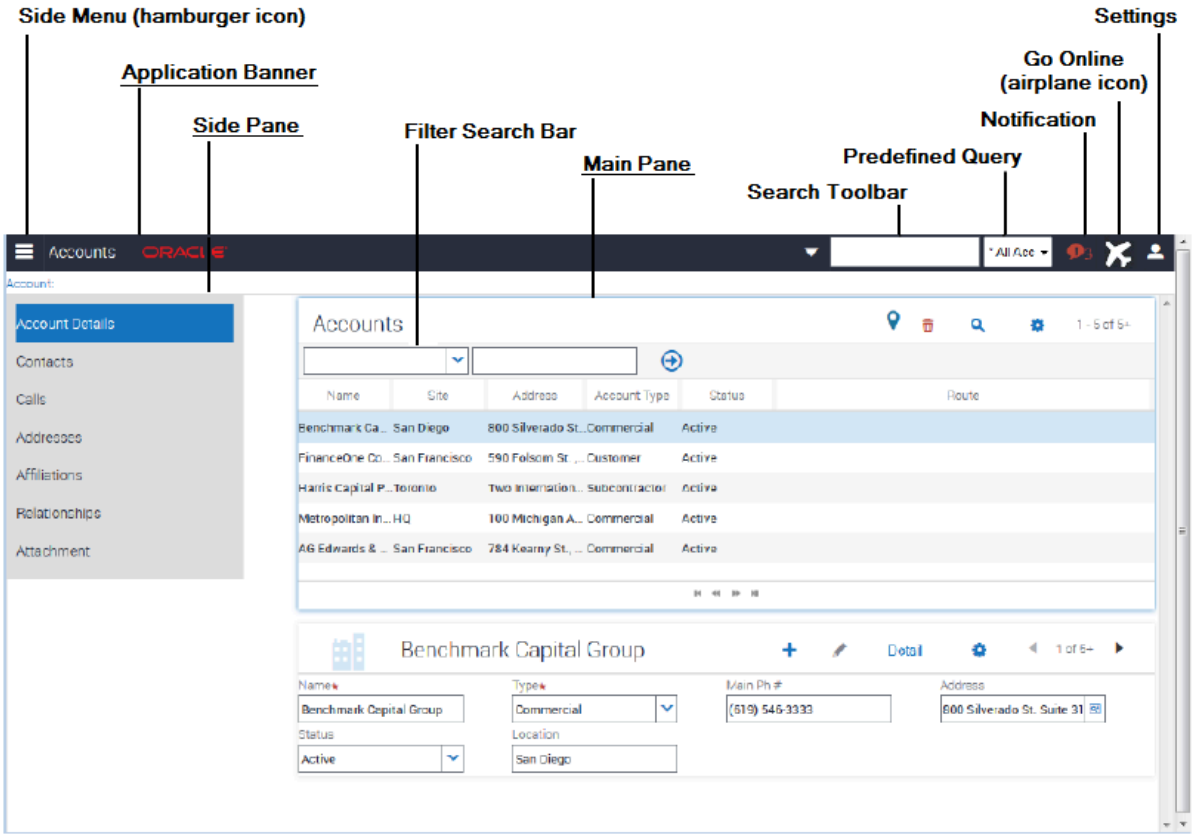
- *Navigate the Siebel Mobile UI*
- *Manage Records in Siebel Mobile*
- *Siebel Mobile UI Themes*
- *Configure the Way Information Appears*
- *Configure Application Settings for Siebel Mobile*
- *Display Location Details in Siebel Mobile*
- *Scan Barcodes in Siebel Mobile*
- *Use Siebel Mobile Applications in Offline Mode*
- *Application Logging for Siebel Mobile*

Navigate the Siebel Mobile UI

The application user interface (UI) for Siebel Mobile is divided into three areas: side pane, main pane, and application banner.

These areas are shown in the following image.


Side Menu (hamburger icon)
Application Banner
Side Pane
Filter Search Bar
Main Pane
Search Toolbar
Predefined Query
Notification
Settings
Accounts
Account:
Account Details
Contacts
Calls
Addresses
Affiliations
Relationships
Attachment
Name
Site
Address
Account Type
Status
Route
Benchmark Capital Group
Detail
Name*
Type*
Main Ph #
Address
Benchmark Capital Group
Commercial
(619) 546-3333
800 Silverado St. Suite 31
Status
Location
Active
San Diego



Siebel Mobile UI Side Pane

The side pane appears to the side of the UI and typically displays the related item information according to the object that's selected from the Side Menu. In the previous image, for example, Accounts is selected from the Side Menu and the related items for Accounts shown in the side pane are: Contacts, Calls, Addresses, Affiliations, Relationships, and Attachment.

Siebel Mobile UI Main Pane

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

Siebel Mobile UI Application Banner

The application banner appears across the start of each page in the UI and it persists for all views. The Side Menu is available on one side of the application banner and the following options are available on the other side of the application banner, as shown in previous image: Search Toolbar, PDQ (Predefined Query) drop-down list, Notification, and Settings.

- **Side Menu (the hamburger icon).** Tap 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. The

following table shows the Siebel objects that are typically available from the Side Menu for each Siebel Mobile application.

- **Search Toolbar.** Tap to perform a search. For more information, see *Search for Records in Siebel Mobile*.
- **PDQ (Predefined Query).** 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 *Run Predefined Searches in Siebel Mobile*.
- **Notification (the exclamation mark icon).** Tap to display notification messages. For more information, see *Review Notification Messages in Siebel Mobile* .
- **Settings (the photo icon).** Tap to configure the behavior of and notification settings for Siebel Mobile applications, or to sign out of Siebel Mobile applications. For more information, see *Configure Application Settings for Siebel Mobile*.

This table shows the 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, Contacts and Messaging Plans.
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.
Siebel Mobile application for Siebel Field 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.
Siebel Mobile application for Siebel Financial Services	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.
Siebel Mobile application for Siebel Clinical	The following Siebel objects are typically available from the Side Menu on the application banner: My Site Visits, My Sites. For more information, see *Siebel Clinical Trial Management System Guide* .

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.

When using the Siebel app on an iOS or Android device to access Siebel Mobile applications, then the following buttons also appear on the side of the screen (under the application banner): Refresh, Attachment, and Home. For more information about these buttons and about using the Siebel app to log in to an application, see *Configure Siebel Mobile on iOS and Android*.

Sign In to Siebel Mobile

Siebel Mobile is supported on iOS and Android devices. You typically access Siebel Mobile applications from the Siebel app downloaded from the Apple App Store or Google Play.

Sign In to Siebel Mobile Using the Siebel App

This procedure describes how to sign in to Siebel Mobile on a mobile device using the Siebel app. This task assumes that you've already integrated Siebel Mobile with the native features on your mobile device and completed, among others, the following key tasks:

- You've downloaded and installed the Siebel Mobile app.
- You've set up the Application Server URL for Siebel Mobile.
- You've configured Siebel Mobile on your mobile device.

1. Start your device and then tap **Siebel** to start the Siebel Mobile app.

   Note: Accept the license info page to continue. This is only displayed the first time you sign in.

2. Enter the application URL in this format: `https://<web site domain>/<objmgr>/<lang>` for the Siebel Mobile application in the host address.
3. Select **Go**.
   a. Enter your user name and password and select **Sign In**.

      After you've signed in, the application starts. These buttons appear inside the icons grid:

      - **Refresh button** for refreshing the page in the browser.
      - **Attachment button** for going to the Attachment Manager view. For more information, see *Manage Attachment Downloads*.
      - **Home button** for returning to the Home page of the Siebel Mobile app.

   For more information about these tasks, see *Overview of Siebel Mobile Integration with Native Device Features*.

   Note: The Identifier doesn't apply to Siebel Mobile connected applications.

Sign Out of Siebel Mobile

Here's how to sign out of Siebel Mobile on your mobile device:

Select **Settings** (the photo icon) on the application banner, and then select the sign-out button.

Navigate Siebel Mobile in Landscape Mode

Siebel Mobile works with various mobile tablet and smartphone devices. If you're familiar with navigating iPad applications, then you'll find that navigating Siebel Mobile is similar.

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

1. Sign in to Siebel Mobile on your mobile device. See *Sign In to Siebel Mobile*.

   After you sign in to Siebel Mobile, these UI elements are on the page that appears in landscape mode:

- **Application banner.** Appears across the start of each page (including the home page) in the UI and it persists for all views.
- **Side pane.** Displays related item information according to the object that's selected from the Side Menu on the application banner.
- **Main pane (work area).** Displays context information according to the selection that you make from the Side Menu on the application banner, the side pane, and in the UI in general.

2. To navigate away from the current view, tap Side Menu and select another Siebel object.

Navigate 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.

In other words, there's only one pane in portrait mode. This procedure shows you how to navigate Siebel Mobile in portrait mode. This procedure assumes that your mobile device is in portrait mode.

1. Sign in to Siebel Mobile on your mobile device. See *Sign In to Siebel Mobile*.

   After you sign in to Siebel Mobile, these UI elements are on the page that appears in portrait mode:

   - **Application banner.** Appears across the start of each page (including the home page) in the UI and it persists for all views.
   - **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.
2. To navigate away from the current view, tap Side Menu and select another Siebel object.

About the Menu (Cogwheel Icon) in Siebel Mobile

The menu (the cogwheel icon) is supported only in online mode. You must be connected to the Siebel Server to use the cogwheel menu in Siebel Mobile.

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

- **About Record.** See *Review Record Summary Information in Siebel Mobile*.
- **Record Count.** See *Display the Total Number of Records in Siebel Mobile*.
- **Create Bookmark.** See *Create Bookmarks in Siebel Mobile*.
- **Columns Displayed.** See *Format List View Column Display in Siebel Mobile*.

For more information about configuring Menu (the cogwheel icon) for Siebel Mobile, see *Configuring Siebel Open UI* .

Select Fields, Drop-Down Lists, and Records

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

- Select 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.

  An asterisk (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.
- Select anywhere on a drop-down list field to open the drop-down list.
- Select multiple options from an associated drop-down list.

  Select once to select an option. Select the same option again to deselect the option.
- Select a record to open and display the record details.
- Select a related item belonging to a record to open the related item.
- Close a dialog box by selecting anywhere outside the dialog box.
- Double-tap objects.

Edit Items Inline

Inline editing is configured by default in Siebel Mobile and lets you:

- 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 can't edit fields inline if any one of the following is true:

- If the field is read-only, then you can't edit the field inline.
- If the field is a calculated field, then you can't 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.

Work with Checkboxes

Checkboxes can be configured to appear in one of the following formats in Siebel Mobile:

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

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

Use 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 (such as, the Siebel Mobile application for Siebel Sales or Siebel Field Service 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 lets you 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 these topics:

- *Update Attachments for an Account*
- *Update Attachments for a Contact*
- *Manage Attachment Downloads*
- *Manage Attachment Uploads*

Note: The attachment functionality is supported in both online and offline mode when customers download the Siebel app or use the Siebel Mobile Archive file to create and deploy a customized Siebel Mobile Application Container for iOS and Android devices. For more information, see *Download and Install the Siebel App* and *Manage Attachment Downloads*.

Review Notification Messages in Siebel Mobile

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.

Note: Using the notification feature is supported only in online mode. You must be connected to the Siebel Server to use notifications in Siebel Mobile.

You review notification messages in the mobile app by selecting **Notification** (the exclamation mark icon) on the application banner.

Note the following about notifications:

- The counter beside the Notification button indicates the number of messages that are waiting for you to read. When there are zero messages, zero appears next to the button.
- If there's one or more message waiting to be read that has an Urgent with Alert severity, then the Notification button blinks. The button stops blinking after the message is read.
- The Notification button doesn't blink if there are messages waiting to be read with only a Normal, High, or Urgent severity.
- If there's one or more message waiting to be read, then the Notification button shows the color of the highest priority unread message.

For more information about enabling and disabling, creating, reviewing, and updating notifications in Siebel CRM, see the chapter about Notifications in the *Siebel Fundamentals Guide*. See also *Configure Notification Settings for Siebel Mobile*.

Create Bookmarks in Siebel Mobile

Creating bookmarks is supported only in online mode. Here's how to create bookmarks for information that you want to return to later:

1. From any page or view, select the menu (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. Select **OK** to close the dialog box.

Upload a User Profile Image to Siebel Server

You can set a user profile image in Siebel Mobile. This involves uploading a user profile image to Siebel Server. The uploaded user profile image will appear instead of the default generic photo for Settings in applications.

Start 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 to start an external application appears on the details page in the work area of mobile applications.

Here's how: Tap the External Application URL link (or icon) on the details page in the main pane.

> **Note:** Starting an external application from within Siebel Mobile is supported only in online mode. You must be connected to the Siebel Server and the Internet to start an external application from within your mobile application.

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* .

Print from Siebel Mobile

You can print from Siebel Mobile (Siebel app), provided that you have access to one of the following:

- A printer that is set up on a 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.

1. With the page that you want to print displayed, tap the Share button (square with up arrow).
   The typical sharing options that are available include the following:
   - Add Bookmark
   - Add to Reading List
   - Add to Home Screen
   - Mail Link to this Page
   - Tweet
   - Print

   On Android devices
2. Tap Print, Select Printer, and then the name of your wireless printer.
3. Specify 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.

Manage Records in Siebel Mobile

This section contains this information:

- *About the Menu (Cogwheel Icon) in Siebel Mobile*
- *Create Records in Siebel Mobile*
- *Modify Records in Siebel Mobile*
- *Delete Records in Siebel Mobile*
- *Search for Records in Siebel Mobile*
- *Link Records to Selected Records in Siebel Mobile*
- *Review Record Summary Information in Siebel Mobile*
- *Display the Total Number of Records in Siebel Mobile*
- *Create Bookmarks in Siebel Mobile*
- *Format List View Column Display in Siebel Mobile*
- *Configure the Number of Records Displayed on Siebel Mobile*

Create Records in Siebel Mobile

You typically add a record by tapping Add (the plus (+) icon) or create a new record by tapping New (the plus (+) or double plus (++) icon) from different areas within the mobile app.

Note: Creating new records in offline mode is supported in Siebel CRM 18.9 Update and later releases.

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 beside the field to display a window from which you can select values or type values.

  For example, you can tap Route to display location details. For more information, see *Display Location Details in Siebel Mobile*.

  Note: This field functionality is supported only in online mode.

- An asterisk (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 application, tap Add (the plus (+) icon) or New (the plus (+) or double plus (++) icon).
2. Type in the details for the new record.
3. You must navigate away from the record to save it.

Note: In the case of child views where records are being associated, you can associate only a downloaded record with a selected record using Add in offline mode.

Modify Records in Siebel Mobile

Here's how to modify records in Siebel Mobile:

- From any Form (detail) applet within in the mobile app:
  - Select the record field that you want to update, and then update the field value. You might not be allowed to update all fields in the record.
  - Navigate away from the record or select **Save** to save your changes to it.

Delete Records in Siebel Mobile

Here's how to delete records in Siebel Mobile:

Note: Users can delete only the records that they own. The delete button is disabled for business components that are marked as Owner Delete.

1. Navigate to and select the record that you want to delete.

2. Select **Delete** (the trash can icon) and then select **Yes** when prompted for confirmation to delete the record.
   In list format, you can also swipe across the record you want to delete and then select **Delete**.

Note: In offline mode, you can only swipe and delete the records that you own.

Search for Records in Siebel Mobile

You can perform a global search in the mobile app by tapping the search toolbar on the application banner. Elsewhere in Siebel Mobile, you can search or query for records if a search control has been configured in Siebel Tools for the specific view or applet in question.

Note: The search toolbar is supported only in online mode. Performing an inline query in offline mode is supported in Siebel CRM 18.9 Update and later releases.

If you don't see a search bar when you navigate to a view or applet in Siebel Mobile, then a search control hasn't been configured in Siebel Tools for that particular view or applet.

You perform searches and inline queries (using Query, the magnifying glass icon) in Siebel Mobile in the same way that you do in Siebel CRM. For more information about querying and searching for records in Siebel CRM, see the *Siebel Fundamentals Guide*. For more information about configuring Siebel search controls, see the *Siebel Search Administration Guide*.

Run Predefined Searches in Siebel Mobile

You can run a saved predefined query (if available) for some Siebel objects in Siebel Mobile.

Note: Running predefined queries is supported only in online mode.

1. Tap Side Menu and then select an object from the drop-down list.
2. Tap the PDQ drop-down list on the application banner to display the list of saved predefined queries for the object. For more information about the application banner, see *Navigate the Siebel Mobile UI*.
   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.

Link Records to Selected Records in Siebel Mobile

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're working with or you can select multiple records (multiple associations) to link to the record that you're 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.

Review Record Summary Information in Siebel Mobile

Reviewing record summary information is supported only in online mode. Here's how to review the summary information for a selected record:

1. Navigate to and select the record whose summary information you want to review.
2. Select the menu (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. Select **OK** to close the record summary information.

Display the Total Number of Records in Siebel Mobile

Displaying the total number of records in a parent object is supported only in online mode. Here's how 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:

   - Select Side Menu and then select an object from the drop-down list.
   - Select Side Menu, select an object from the drop-down list, and then a related item from the side pane.

2. Select the menu (the cogwheel icon) in the work area and then select **Record Count**.
   The total number of records in the parent object is returned.
   This table describes some fields and their guidelines for usage:

Field	Guideline
Parent Organization	If this organization is a suborganization, select the parent organization. This allows an organization to be associated with another organization.
Partner Flag	Used for Siebel Partner Relationship Manager. This read-only checkbox, if selected, indicates that the organization represents an external enterprise which is a partner of your company.

3. Select **OK** to close the record count information.

Configure the Number of Records Displayed on Siebel Mobile

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 isn't 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 isn't set. For more information about using the NumberOfListRows application parameter, to configure the number of records displayed on each page, see the following procedure.
- 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 doesn't 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).

Configure the Number of Records Displayed on Each Page

1. In the Siebel web client, navigate to the **Administration - Web Browser** screen and then the **Browsers** view.
2. Select the entry you want to configure the number of records displayed on each page for. If there isn't an entry, create one by selecting **New Record** from the drop-down list.
3. With the browser selected, select the **Capabilities** list.
4. If the NumberOfListRows appears in the list, then select it, select **Edit**, set the Capability Value to <the number of records to display per page >, and then save the record.
5. If the NumberOfListRows doesn't appear in the list, then select **New**.

In the Add Capabilities dialog box that appears, the NumberOfListRows may or may not appear in the list of capabilities.

a. If the NumberOfListRows appears in the list, then:

   - Select NumberOfRows in the list and select **OK**.
   - In the Capabilities list, select **NumberOfListRows**, select **Edit**, and then set the Capability Value to `<the number of records to display per page>`.
   - Save the record.

b. If the NumberOfListRows doesn't appear in the list, then:

   - Select **New**.
   - Set the Capability Name to NumberOfListRows.
   - Set the Capability Value to `<the number of records to display per page>`.
   - Save the record.

Siebel Mobile UI Themes

About the Siebel Redwood UI Theme

The Siebel Redwood theme provides all the functionality with a new Redwood user experience (UI). It's built on the Open UI framework and includes several new features.

Home with Ask Oracle

Home with Ask Oracle provides a new application home and global navigation experience that lets users:

- Search for screens and views
- Access available tools
- Navigate through level 1 and level 2 views
- Receive desktop alerts and toast notifications

New Styles, Colors, Icons, and Fonts

Oracle Redwood styling stays in line with Oracle's desktop applications. The fonts and colors are chosen to reflect the new color schemes introduced across Oracle's portfolio and are designed to reduce eye strain. Bigger icons and less clutter also makes it easier to navigate the UI.

Restyled Home Page, Screens, and Views

The new Redwood-styled components overlay existing functions. The application Home page is redesigned with a simplified header, fewer elements, and cleaner designs. The uncluttered layout comes with larger buttons, menus, and text fields, emphasizing a less dense look. Show and hide the Search toolbar using a toggle button in the menu.

Enhanced Smartphone UX for Siebel Mobile

Siebel Mobile applications feature the Smartphone UX PHONE theme for iOS and Android™ operating system devices. The Smartphone UX PHONE theme is visually and functionally aligned with Redwood desktop employee-facing and partner applications. It transforms list applets into Tile visualization mode with infinite scrolling, and it defaults navigation to Side Menu mode.

The enhanced UX employs specialized, ready-to-use context renderers to optimize mobile application layouts on client devices – thus ensuring optimal use of available real estate. The Smartphone UX PHONE theme supports the Redwood theme by default, and it's available in portrait mode only.

You enable the Smartphone UX for mobile applications by setting the `AutoTileType` component parameter to PHONE, for example, as follows:

```
// change param AutoTileType=PHONE for comp <application_object_manager>_<language>
change param AutoTileType=PHONE for comp ServiceMObjMgr_Enu
```

After you change the `AutoTileType` component parameter – for the changes to take effect on smartphones – you need to restart the component. Changing the `AutoTileType` component parameter doesn't change the look and feel of the application on desktop or tablet devices.

Note: The URL must not be used for same user across tab and phone devices; otherwise, you'll experience look-and-feel issues.

The Smartphone UX PHONE theme includes these elements across all views:

- **Application banner.** The application banner appears across the start of each page in the smartphone theme. It contains these options: Side Menu, Search, and Settings.
- **Accordion panel.** The accordion displays contextual information according to the selection that you make from the Side Menu. The information is displayed in accordion format. You expand (or close) each applet in the accordion panel to view more (or less) information on your smartphone.
- **Footer banner.** The footer banner displays the *detail view navigation options* according to the selection that you make from the Side Menu.

Note: `Redwood` is the default Smartphone UX PHONE theme for Siebel mobile applications.

Enhanced Smartphone UX PHONE Theme Updates in Release 26.8

In Siebel Release 26.8, the Smartphone UX PHONE theme for Siebel mobile applications is enhanced with these updates:

- **Restyled application banner, accordion panel, and footer banner.** A simplified application header with fewer elements and a redesigned accordion panel
- **New Styles, Colors, Icons, and Fonts.** Updated to align with Oracle's new portfolio-wide color schemes, including a refined palette and restyled date picker, calculator, currency control, and list of values
- **Refreshed styling for Applets, and views.** Improved spacing between fields, buttons, and other interface elements, with restyled list and form applets

The enhanced Smartphone UX feature is supported for these Siebel Mobile applications:

- Siebel Mobile application for Siebel Sales
- Siebel Mobile application for Siebel Field Service
- Siebel Mobile application for Siebel Financial Services

For more information about the Smartphone UX feature and Auto Tile Visualization, see the *Configuring Siebel Open UI* guide.

About the Siebel Mobile Aurora and Zante UI Themes

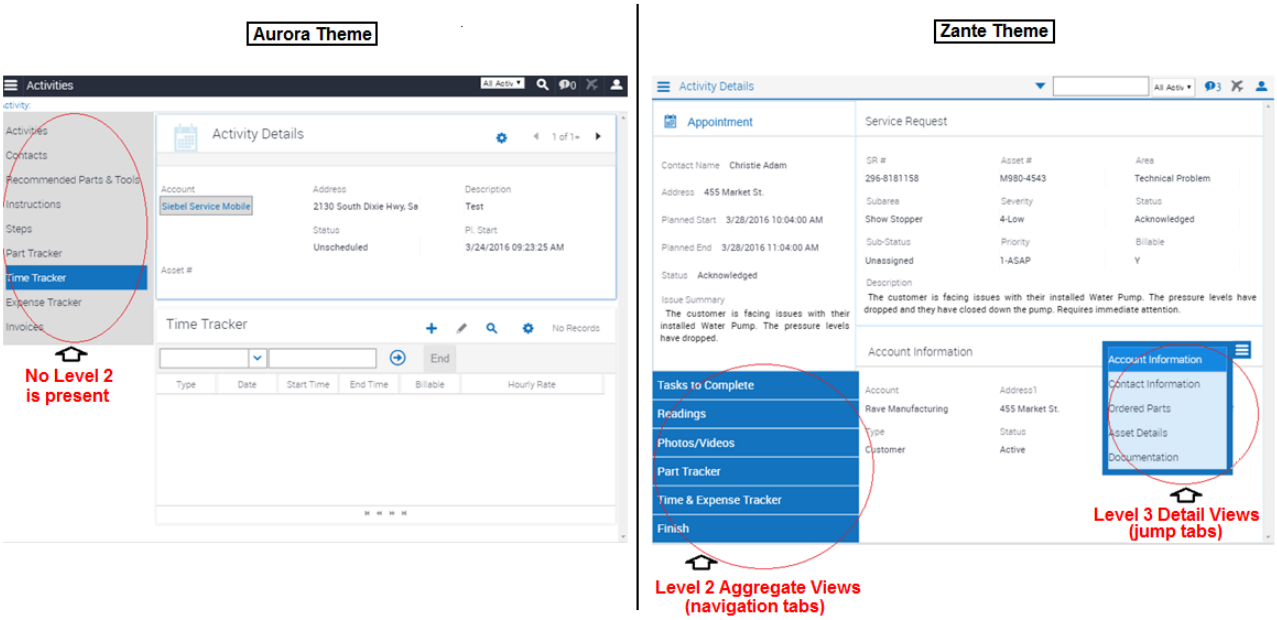
The Siebel Mobile applications for Siebel Field Service use the Zante UI theme by default, which is different from the Aurora UI theme, which is the default theme used by other Siebel Mobile applications (such as Siebel Pharma, Siebel Sales, and Siebel Financial Services).

- For information about navigating Siebel Mobile applications using the Aurora theme, see *Use the Home Page for Siebel Pharma*.
- For information about navigating Siebel Mobile applications using the Zante theme, see *Use the Home Page in Siebel Field Service*.
- For information about how to change the UI theme for your Siebel Mobile application, see *Configure Application Behavior for Siebel Mobile*.

The main difference between the Zante and Aurora themes is that the Zante theme uses second level navigation views as shown in the following image. In this image:

- The Aurora theme shows the Time Tracker details for a selected activity. The complete options available for account are: Activities, Contact, Recommended Parts & Tools, Instructions, Steps, Part Tracker, Time Tracker (which is selected), Expense Tracker, and Invoices.
- The Zante theme shows the Service Request details for an appointment. The following second level navigation views (or Level 2 Aggregate Views) are available for the appointment: Tasks to Complete, Readings, Photos/ Videos, Part Tracker, Time & Expense Tracker, Finish. The following level 3 detail views are available for the selected service request: Account Information, Contact Information, Ordered Parts, Asset Details, Documentation.

For information about how to set up second level navigation views for your Siebel application, see *Configure Second-Level Navigation Views*.



Configure the Way Information Appears in Siebel Mobile

Configure 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 the *Configuring Siebel Open UI* guide.

Configure Second-Level Navigation Views

You can configure second level navigation views in Siebel Tools for your Siebel application as required.

1. In Siebel Tools go to the Object Explorer and select **Screen**.
2. Query for the screen that you want.
3. In the screen view, add the new view.

   For each view that you add:
   - Set Type to Aggregate View.

- Set the sequence number for the view.
- Don't set the Parent Category for the view.

4. Update the repository and deliver the updates, then start the Siebel application.
   The new view appears alongside the other second level aggregate views in the UI.

Format List View Column Display in Siebel Mobile

Here's how to specify the columns to appear in the list view and in what order.

Note: This task is supported only in online mode.

The Columns Displayed option is available on list pages only, not on detail pages.

1. Navigate to the object view that you want by doing one of the following:
   - Select Side Menu and then select an object from the drop-down list.
   - Select Side Menu, select an object from the drop-down list, and then a related item from the side pane.
2. Select the menu (the cogwheel icon) in the work area and then select **Columns Displayed**.
3. In the dialog box that opens, do this:
   a. Use the navigation arrows to move selected items forward and back 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.

Configure Application Settings for Siebel Mobile

You use Settings (the photo icon) on the application banner to configure the application settings for Siebel Mobile.

Note: You must be connected to the Siebel Server to make these changes. Configuring application settings is supported only in online mode.

When you select **Settings** on the application banner, this information appears:

- The signed in user's photo, as long as one is uploaded to the user's profile on Siebel Server. Otherwise, a default generic photo appears. For more information, see *Upload a User Profile Image to Siebel Server*.
- The signed in user's name and email address.
- The following options: Settings and Logout.
  - **Settings.** Has the following suboptions: Behavior and Notifications.
    - **Behavior.** See *Configure Application Behavior for Siebel Mobile*.
    - **Notifications.** See *Configure Notification Settings for Siebel Mobile*.
  - **Log Out.** See *Sign Out of Siebel Mobile*.

Configure Application Behavior 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.

> **Note:** You must be connected to the Siebel Server to perform this task. Configuring application behavior settings is supported only in online mode.

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

Configure Application Behavior for Siebel Mobile

1. Select **Settings** (the photo icon) on the application banner, and then select the **Settings** option.
2. Select **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 application starts. Select **Startup View**, and select a view from the drop-down list.
Navigation Control	Specifies the navigation control to use in the mobile application. Select **Navigation Control**, and select one of these options: ○ **Side Menu.** Indicates to use the hamburger navigation control (which is the default navigation control) in the application where all Siebel objects appear in a menu drop-down list in the UI. ○ **Tab.** Indicates to use the tab navigation control in the application where all Siebel objects appear in tab format in the UI. ○ **Tree.** Indicates to use the tree navigation control in the application where all Siebel Objects appear in tree format in the UI.
Theme	The UI theme to use throughout the application. Select **Theme**, and select a theme from the drop-down list. Available themes include: ○ **Aurora.** Connected app: This theme is used by default in the Siebel Mobile applications for Siebel Pharma, Siebel Sales, and Siebel Financial Services. Disconnected app: Siebel Pharma and Siebel Sales only. ○ **Zante.** Connected and disconnected apps: This theme is used by default in the Siebel Mobile applications for Siebel Field Service.

Field	Description
	○ **Synergy.** Connected app: This theme is available only in the Siebel Mobile applications for Siebel Pharma, Siebel Sales, and Siebel Financial Services. Disconnected app: Siebel Pharma and Siebel Sales only. ○ **Vanilla.** Connected app: This theme is available only in the Siebel Mobile applications for Siebel Pharma, Siebel Sales, and Siebel Financial Services. Disconnected app: Siebel Pharma and Siebel Sales only. ○ **Redwood.** This is the default Smartphone UX PHONE theme for Siebel mobile applications. When Side Menu is selected as the navigation control, the Aurora and Zante themes are available. For more information, see *About the Siebel Mobile Aurora and Zante UI Themes*. When Tab is selected as the navigation control, the Synergy and Vanilla themes are available. When Tree is selected as the navigation control, the Aurora theme is available.
Transition	The view transition mode to use when moving from one view or applet to another view or applet in the mobile application. Select **Transition**, and select a view transition from the drop-down list. The options are: ○ None ○ Slide In (that is, slide forward) ○ Slide Left (that is, slide backward) ○ Flip ○ Fade
Confirm Before Deleting Record	Specifies whether to prompt users for confirmation before deleting a record, as follows: ○ **On** indicates to prompt users for confirmation. ○ **Off** indicates not to prompt users for confirmation before deleting a record. Select the **Confirm Before Deleting Record** option so that a check mark icon or On appears. Select the option again so that **x** or **Off** appears.
Log Events (disconnected only)	Set Log Events to one of the following options to configure logging for Siebel Mobile applications: ○ Metadata Extraction ○ Data Extraction - Basic ○ Data Extraction - Detailed ○ ClientSystem, UpSync ○ All **Note:** Log events don't apply to Siebel Mobile connected applications. Log events apply only to Siebel Mobile disconnected applications.

3. Save the changes when finished.

Configure Notification Settings for Siebel Mobile

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

Note: You must be connected to the Siebel Server to perform this task.

1. Select **Settings** (the photo icon) on the application banner, and then select the **Settings** option.
2. Select **Notification** (the exclamation mark icon), 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've difficulty distinguishing the colors of the messages.	N
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've 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've difficulty distinguishing the colors of the messages.	U

3. Save the changes when finished.

Display Location Details in Siebel Mobile

Global Positioning System (GPS) is integrated with Siebel Mobile, so that when you tap the Route button (the pin icon), shown in the following image, a map window opens showing the location details.

Note: Displaying location details using the Route button is supported only in online mode. You must have an internet connection to display location details in Siebel Mobile.

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 Route button (or the map functionality) in Siebel Tools for the applet in question. For more information, see the topics about maps in *Configuring Siebel Open UI* .



The Route button is available in the main pane or work area of Siebel Mobile, provided that the map functionality is enabled for the mobile application. If you can't see Route button or if you can see it but it's disabled, then the map functionality isn't enabled for the mobile application.

Information about the following is included in this topic:

- *Enable the Map Functionality for Siebel Mobile*
- *Display Route Details in Siebel Mobile*

Enable 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.

Note: Map functionality is supported only in online mode. You must have an internet connection to use the map functionality in 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 enable Location Services.

    If location services are disabled on your mobile device, then you won't be able to use the map functionality.
2. Disable block pop-ups on your mobile device (iPad) as follows:
    a. Start your iPad.
    b. Go to **Settings** > **Safari**, and then disable Block Pop-ups.

Display Route Details in Siebel Mobile

You can use the Route button to display the route details for a call or an account. The procedure is the same when using the Route button in other views.

Note: The Route button is supported only in online mode. You must have an internet connection to use the Route button in Siebel Mobile.

This procedure assumes that the map functionality is enabled for Siebel Mobile as described in *Enable the Map Functionality for Siebel Mobile* .

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. Select **Route** (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 isn't found for a given address, then an error message appears in the map window.

Scan Barcodes in Siebel Mobile

Barcode scanning is supported by default for activity parts in the Siebel Mobile application for Siebel Field 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 Field Service lets you scan barcodes for parts using a barcode reader. For more information, see *Change Part Records for an Activity*.
- You can also search for records by scanning barcode data in the Siebel Mobile application for Siebel Field Service. For more information, see *Scan Barcodes to Search for Records in Siebel Mobile*.

Scan Barcodes to Search for Records in Siebel Mobile

You can use a barcode reader to search for records in the Siebel Mobile application for Siebel Field 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 *Scan Barcodes in Siebel Mobile*.

1. Select **QuickSearch** in the search toolbar on the application banner.
2. In the Barcode drop-down list, select **Asset#**.

   A text box field appears.
3. Scan the barcode (in this example, the asset number).

   A query is performed and results are returned in the view containing the record with the Asset# data.

Use Siebel Mobile Applications in Offline Mode

You can use Siebel Mobile in offline mode if your mobile device has a wireless network connection. In offline mode, your mobile device is not connected to the Siebel Server and you cannot synchronize any changes that you make while working in offline mode. You must switch back to online mode, and then synchronize the changes. To use Siebel Mobile in offline mode, perform the following tasks.

1. Log in to Siebel Mobile.

   For more information, see *Sign In to Siebel Mobile*.
2. Switch your mobile application to work in offline mode.

   For more information, see the following:

   - *Use the Airplane Icon in Siebel Mobile*
   - *Switch to Offline Mode for the First Time in Siebel Mobile*
   - *About Switching to Offline Mode Again*
3. Modify the cached data in offline mode as required.

   For more information, see *Work in Siebel Mobile Offline Mode*.
4. Synchronize the changes that you made while working in offline mode with the Siebel Server.

   For more information, see the following:

   - *Manually Sync Data in Siebel Mobile*
   - *Sync Icons*
5. Verify that the synchronization changes that you made while working in offline mode have been synchronized with the Siebel Server.

   For more information, see *Verify Data Sync*.
6. Review the synchronization errors.

   For more information, see *Review Sync Errors*.

Use the Airplane Icon in Siebel Mobile

The airplane icon on the application banner indicates whether Siebel Mobile can connect to and sync data with the Siebel Server.

If the app can connect to and sync data with the Siebel Server, then the application connects to the Siebel Server and is in online mode. If the app can't connect to and sync data with the Siebel Server, then the application disconnects from the Siebel Server and is in offline mode.

The airplane icons, shown in the following table, indicates the state of the connection (online or offline) for the mobile app.

Icon	Description	Status
	Go Offline (solid airplane icon)	Indicates a connected or online state, where syncing (data upload and download) between the mobile app and the Siebel Server takes place automatically.
	Go Online (empty airplane icon)	Indicates a disconnected or offline state, where syncing (data upload and download) between the mobile app and the Siebel Server doesn't take place automatically. In this case, you need to manually upload or sync data between the mobile app and the Siebel Server by selecting **Go Online** (the empty airplane icon), and then selecting a reconnection option. For more information, see the following procedure.

Use the Airplane Icon

- Select **Go Offline** (the solid airplane icon) on the application banner to go offline and work in disconnected mode. For more information, see these topics:
  - *Switch to Offline Mode for the First Time in Siebel Mobile*
  - *About Switching to Offline Mode Again*
  - *Work in Siebel Mobile Offline Mode*
- Select **Go Online** (the empty airplane icon) on the application banner, and then select one of these options:
  - **Upload and Go Online.** Select this option to trigger a data upload and go online.
  - **Sync and stay Offline.** Select this option to sync data but remain in offline mode.
  - **Upload Only and Stay Offline.** Select to trigger a data upload only but remain in offline mode. For more information, see *Manually Sync Data in Siebel Mobile*.

Switch to Offline Mode for the First Time in Siebel Mobile

When you switch to offline mode for the first time while working in Siebel Mobile, a full data and metadata download is initiated from Siebel Server to the mobile device. But when you subsequently switch to offline mode, then either a full or an incremental synchronization process is initiated according to how the Siebel Mobile Always Full Sync system preference is set.

For more information, see the following:

- *Configure Sync for Siebel Mobile*
- *About Switching to Offline Mode Again*

1. Wait for the following data synchronization notification message: Data is ready for download.

2. Tap Go Offline (the solid airplane icon) on the application banner to switch to offline mode.
   - A down arrow appears next to the solid airplane icon, which shows that the data and metadata is being downloaded to the mobile device.
   - A progress bar appears after the solid airplane icon, which shows the progress of the data and metadata download. When the progress bar is full, this indicates that the metadata has downloaded to the mobile device.

   For more information about the airplane icon, see *Use the Airplane Icon in Siebel Mobile*.
3. (Optional) Tap Log (the bug icon) on the application banner to review the log event messages and debug information for the Siebel Mobile disconnected application as required. For more information, see *Application Logging for Siebel Mobile*.
4. After the full data and metadata has downloaded to the mobile device, the application UI automatically refreshes and goes into offline mode.
   You're now in offline mode and disconnected from the Siebel Server. Notice that the solid airplane icon on the application banner changes to an empty airplane icon to indicate a disconnected state. You can now change the cached data while disconnected from the Siebel Server. For more information, see *About Switching to Offline Mode Again* and *Work in Siebel Mobile Offline Mode*.

Work in Siebel Mobile Offline Mode

After the offline data package has downloaded successfully to your mobile device, you are ready to change the cached data while in Siebel Mobile offline mode. You can start working in offline mode right away, or you can close the Siebel app and work offline at a later time.

The following procedure shows you how to work in offline mode. The procedure assumes that you have already successfully downloaded the offline data package, and that you have closed the Siebel app.

1. (Optional) Switch your mobile device to airplane mode as follows:
   - Tap Settings on your mobile device.
   - Set Airplane Mode to On.
     This is an optional step. Switching your mobile device to airplane mode disables the wireless communication abilities on your mobile device, and prevents a reconnection to the Internet.
2. Tap Siebel to start the Siebel app and log in to the Siebel Mobile disconnected application - for more information, see *Sign In to Siebel Mobile*.
   Notice that the airplane icon on the application banner is empty, which indicates that you are in a disconnected state.
3. Modify the cached data as required.
   You can create, edit, update, and delete records for parent objects and associated related items, and so on. Notice that when you modify the cached data, a clock icon appears next to the empty airplane icon to indicate that there are data changes waiting to be uploaded to the Siebel Server. For more information about the other synchronization icons that can appear next to the airplane icon, see *Sync Icons*.
4. When you have finished modifying the cached data, you can synchronize the changes made while working in offline mode.
   For more information, see *Manually Sync Data in Siebel Mobile*.

About Switching to Offline Mode Again

When you switch to offline mode for a second and subsequent time, then either a full or incremental synchronization process is initiated according to how the Siebel Mobile Always Full Sync system preference is set.

If network connectivity is available and a reconnection to Siebel Server can be made when you switch to offline mode for a second or subsequent time, note the following:

- If an incremental synchronization is initiated between Siebel Server and the mobile device, then all changes from the server database that were made by others are downloaded to update the local database on the mobile device. When the incremental synchronization process is complete, the mobile application device moves to offline mode and the user can work with the updated data.
- If any of the following situations occurred since the last offline data package was downloaded, then users are prompted to perform a full data and metadata download again. After the download is complete, the mobile device moves to offline mode and the user can work with the latest data.
  - The repository changes
  - The responsibility of the user changes
  - The position of the user changes
  - The data changes
  - The user node is re-extracted
  - A business component filter changes
  - A business object filter changes
- If network connectivity is unavailable or a reconnection to Siebel Server cannot be made when you switch to offline mode for a second and subsequent time, then the mobile device moves to offline mode and the user can work with the last data package that was downloaded.
- If network connectivity is unavailable or a connection to Siebel Server cannot be made when you log in to Siebel Mobile, then the application automatically launches in offline mode using the last data package that was downloaded (provided that one exists). The user works in offline mode with the last data package that was downloaded.

Manually Sync Data in Siebel Mobile

If you've been using a Siebel Mobile disconnected application in offline mode, then you must manually sync the changes made while you were working in offline mode with the Siebel Server.

If needed, switch your mobile device from airplane mode back to connected mode.

1. Sign in to the Siebel Mobile disconnected application. For more information, see *Sign In to Siebel Mobile*.

2. Select **Go Online** (the empty airplane icon) on the application banner, and then select an option:
   - **Upload and Go Online.** Select to automatically trigger a data upload and to go back online after the data upload has finished.

     > **Note:** If the UI session hasn't expired before going offline, then selecting Upload and Go Online will use the same UI session to sync data. If the UI session has expired, then the Siebel sign in page appears prompting you to sign in to the application again. After sign-in, syncing starts automatically start and once complete, the UI refreshes.

   - **Sync and stay Offline.** Select to sync data (that is, upload data changes made while working in the mobile application in offline mode and download any new changes made on the server) but remain working in offline mode.

     When you select this option, any records you see in offline mode are one of these:

     - Records that have been newly modified (created, updated, or deleted) on the server since the last synchronization.
     - Records (user owned) that were successfully uploaded to the server and processed since the last synchronization.
     - Records that have just been uploaded to the server and are waiting to be processed.
   - **Upload Only and stay Offline.** Select to trigger a data upload only but remain working in offline mode.

     No matter which option you select, the transactions are stored in a text file in the `HHsync` folder under `\USER_NAME\SYNC_NODE_ID\upsync\pretxn_x.txt` before being uploaded.

     An empty airplane icon indicates a disconnected or offline state, where synchronization (data upload and download) between the mobile application and Siebel Server doesn't take place automatically. A clock next to the airplane icon indicates that there are changes waiting to be synchronized. For information about the other synchronization icons that can appear next to the airplane icon, see *Sync Icons*.
3. Verify that all data has synchronized correctly.

   For more information, see *Review Sync Errors*.

Sync Icons

This table describes the various sync icons that can appear next to the airplane icon on the application banner of your Siebel Mobile disconnected application.

Icon	Label	Status
	Full Metadata Download in Progress (a down arrow).	Indicates that a full metadata download is in progress.

Icon	Label	Status
	Data Download Failure (an exclamation mark in a red triangle).	Indicates that there has been a full metadata download failure.
	Data Synchronization Pending (a clock with hands).	Indicates that data changes are waiting to be synced.
	Data Download In Progress (a box with a check mark).	Indicates that a data download is in progress.
	Incremental Data Download Failure (a horizontal bar in a red circle).	Indicates that there has been an incremental data download failure.
	Data Upload In Progress (an up arrow).	Indicates that a data upload is in progress.
	Data Upload Failure (an exclamation mark in a red triangle).	Indicates that there has been a data upload failure.

Verify Data Sync

Verify that the synchronization changes that were made while working in offline mode have been synchronized with the Siebel Server.

To verify data synchronization

1. Log in to the Siebel Mobile disconnected application.

   Typically, you log in to Oracle's Siebel Mobile in connected mode, where you are connected to the Siebel Server.

2. Verify that all changes that you made while working in offline mode have been synchronized with the Siebel Server and that you can now see them when connected to the Siebel Server.

   If you cannot see some changes, then review the synchronization errors as shown in *Review Sync Errors*.

Review Sync Errors

If conflicts or errors occur during synchronization, the Notifications feature lists all the synchronization errors, including summary information about the error. You can also review the respective synchronization log files in the Conflict - Administration screen. Use the following procedure to review the synchronization errors.

1. Log in to the mobile application.
2. Tap Notification (the exclamation mark icon) on the application banner.
3. Review all the messages that have a Sync Error, Data Sync, or Login notification.

Application Logging for Siebel Mobile

You use the Logs button on the application home screen to generate the log event messages and debug information for Siebel Mobile disconnected applications, provided that logging has been enabled for the application.

This information is captured as a part of the log file:

- Logged in user details (Sync node ID is available only for offline enabled applications)
- Device information like device name, manufacture, model, free memory, RAM and other hardware information which is helpful to understand the hardware level bottlenecks and thresholds.
- All the following types of logs are captured
  - Default logs
  - Information
  - Errors
  - Browser errors
  - Warnings

Note: It's recommended that you enable the Log button when you need to capture logs or when the technical support team asks you to do so. Otherwise, the button can be disabled.

Enable Logging for Siebel Mobile Users

By default, generating log files in Siebel Mobile is disabled. But, users can enable it when needed.

If logging is disabled, when a user selects the **Logs** button, a dialog box appears. Users need to select **Enable Logs** to start the log capturing process. The button is then toggled as **Disable Logs**.

Clear Log Information

When the user selects on the **Clear Logs** button a confirmation dialog will appear with **OK** and **Cancel** buttons. On selecting of Cancel nothing happens this simply closes the dialog however, on select of OK button all the logs that are captured so far in the current cycle are cleared.

All the data including log file will be deleted from the mobile when **OK** button is selected.

Clear logs will not change current state of enable/disable state of capturing log mechanism. If logging cycle is enabled and used, we recommend to Clear Logs before re-installing the app.

Send Log Information

Here's how to send Siebel Mobile log information.

User must click on **Send Email** button to send the log file to the respective recipient.

The **Send Email** button will be enabled only if log functionality is enabled i.e. on clicking of **Enable Logs**. Once clicked on **Send Email** button, in the background `SiebelMobileLogs.txt` file will be generated and configured default email client app will be opened in compose mode.

You can send email with persisted `SiebelMobileLogs.txt` file. By clicking on **Send Email**, one LOG cycle is completed, and the logging state goes back to its default disabled state.

In Android > Download/`SiebelMobileLogs.txt`

In IOS > Siebel/`SiebelMobileLogs.txt`

> **Note:** In IOS, if the Siebel Folder which contains `SiebelMobileLogs.txt` is not visible, restart the mobile. This issue generally occurs in IOS, specifically in IOS 17.x versions.In Android, If you are re-installing Siebel app after uninstalling it, ensure that file `SiebelMobileLogs.txt` is deleted from the download folder, if it exists prior to the re-install. Alternatively, You can also click on **Clear Logs** button from LOG screen before uninstalling.

> **Note:** Before using **Send Email** functionality, ensure user is able to send/receive email from their email client.

About the Siebel Mobile Log API

This table describes the Siebel Mobile log function in more detail:

Item	Description
Function Name	SiebelApp.S_App.LogOfflineEvent()

Item	Description
In Parameters	The Siebel Mobile log function takes the following in parameters: `message: string, params: string`
Out Parameter	The Siebel Mobile log function takes the following out parameter: `Type: void`
Description	This function takes two values (message and params) which are formatted and stored in the device storage. An error message appears (Local storage is full) in the console log when the device storage is full. Siebel stops logging error messages after this error message appears.
Example	`SiebelApp.S_App.LogOfflineEvent('%1 - %2:= %3', 'class1', 'method1', 'data'); //This will be logged as: class1 - method1:= data`

Unsupported Siebel Mobile Features in Offline Mode

The features listed in this topic are not supported in offline mode. You must be connected to the Internet and, in some cases, to the Siebel Server to do the following in your Siebel Mobile disconnected application:

- *Search for Records in Siebel Mobile*

  The Search toolbar is not supported in offline mode, except to perform barcode-related functionality. Performing an inline query in offline mode is supported only in Siebel CRM 18.9 Update and later releases.
- Use the cogwheel icon, see *About the Menu (Cogwheel Icon) in Siebel Mobile*
- *Create Bookmarks in Siebel Mobile*
- *Configure Application Settings for Siebel Mobile*
- *Display Location Details in Siebel Mobile*
- *Run Predefined Searches in Siebel Mobile*
- *Start an External Application from Siebel Mobile*
- *Sign Out of Siebel Mobile*
- Use the following icons to make a selection or type some text: Phone, Email, Pin, URL
- Select multiple records in list applets

  > **Note:** Multiple record selection for associate applets only is supported in offline mode.

- Other features not supported in offline mode include:
  - Cascade delete
  - Currency pop-up controls
  - Default Applet Menu items
  - Dynamic drilldowns
  - Dynamic controls

    - Execution of joined fields
    - MVG (multi-value group) fields. MVG fields are read-only in offline mode
    - Thread bar
    - Toggle applets
    - The Back button to go to a previous page
    - The Show More option in List applets is unavailable
    - The User Settings view is unavailable.

- The expression parser is limited

  The expression parser is used for parsing expressions such as those for field validations, predefault and post-default properties, Business Component search specifications, and so on.

  The expression parser does not support all the expressions that are supported by Siebel Server.

5 Getting Started with Siebel Mobile Application Container (Siebel App)

Overview of This Chapter

This chapter describes how to get started with the Siebel Mobile Application Container (Siebel app) and how to integrate Siebel Mobile with native device features.

Here are the topics:

- *Download and Install the Siebel App*
- *Integrate with Native Device Features*
- *Set Up the Host Server for Siebel Mobile*
- *Configure Siebel Mobile on iOS and Android*
- *Reset the Host Server Using the Siebel App*
- *Manage Attachments Using the Siebel App*
- *Configure Privacy Settings for Native Device Features*

Download and Install the Siebel App

This section shows you how to download and install the Siebel app on your mobile device. You need the Siebel app to dynamically link to a Siebel Mobile server, so that you can access and use native device features, such as the local file system and location services, from Siebel Mobile.

Download and Install Siebel from the Apple App Store

The customer's specific domain must be configured. You can use the Siebel mobile archive (.zip file).

See *Download and Use the Mobile Archive File (Admin Task)* for more information.

Download and Install the Siebel App from Google Play

You can download and install the Siebel app (Siebel.apk file) from Google Play for Android devices such as Samsung Galaxy tablet. To create and deploy your own customized Siebel app, then ignore this procedure and see *Download and Use the Mobile Archive File (Admin Task)*.

Download 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 *Configure Siebel Mobile on iOS and Android*.

Download and Use the Mobile Archive File (Admin Task)

Instead of downloading the Siebel app and installing it on a mobile device as described in *Download and Install the Siebel App*, administrators can copy the `SiebelMobile.zip` file from the Siebel Tools installed home directory.

Prerequisites for Using This Method

Make sure you have a proper internet connection.

On Mac laptops:

- `Node.js v22.13` See: *https://nodejs.org/download/release/v22.13.0/*.
- `JDK 17` See: *https://www.oracle.com/java/technologies/javase/jdk17-archive-downloads.html*.
- `Android Studio and Android SDK` See: *https://developer.android.com/studio*.
- `Xcode 26.4` See: *https://developer.apple.com/xcode*.

On Windows laptops:

- `Node.js v22.13` See: *https://nodejs.org/download/release/v22.13.0/*.
- `JDK 17` See: *https://www.oracle.com/java/technologies/javase/jdk17-archive-downloads.html*.
- `Android Studio and Android SDK` See: *https://developer.android.com/studio*.

  > **Note:** Multiple Android SDK versions will get mapped post Android Studio installation in SDK Manager. You need to select API level 35/36.

Set Up the Environment

1. Copy the `SiebelMobile.zip` archive file.
2. Extract the `SiebelMobile.zip` archive file to `<PROJECT_ROOT>\RNMobile\`.
   The project root folder becomes `<PROJECT_ROOT>\RNMobile\Siebel`.

Prepare the IPA File

On Mac laptops:

1. In terminal, navigate to `<PROJECT_ROOT>\RNMobile\Siebel\ios` folder and execute the `pod install` command.
2. Navigate to `<PROJECT_ROOT>\RNMobile\siebel\ios\siebel\Info.plist`.
   a. Change `<string>Release_Version</string>` with the appropriate build label.
      Example: `<string>23.9</string>`
   b. Add a domain list which need to be allowed in the Siebel app:

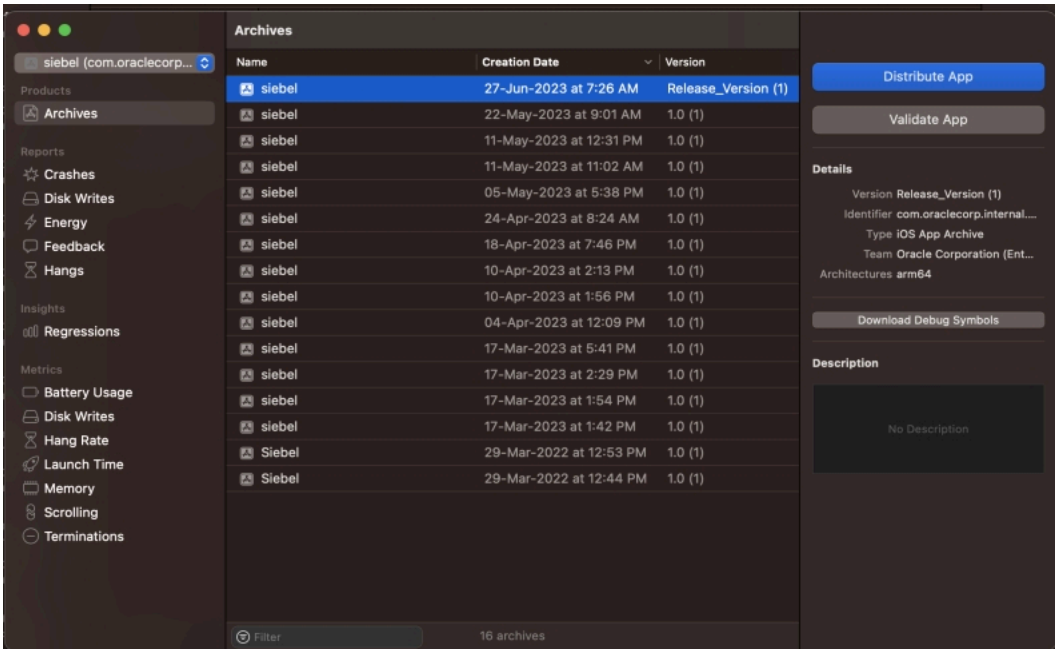
```
<key>WKAppBoundDomains</key>
<array>
```

```
<string>*.oracle.com</string>
<string>domain1</string>
<string>domain2</string>
....
</array>
```

3. Open the Xcode application using below command in a terminal and navigate to `<PROJECT_ROOT>\RNMobile\siebel\ios`.

   a. Execute command `open siebel.xcworkspace`.
   b. With above command it should open the project in Xcode.
   c. Add the Apple signing profile details matching to your company account details.
   d. Clean the Build Folder from the Product menu.
   e. Build from the Product menu.
   f. Select **Any iOS Device** option from **Product > Destination** menu item.
   g. Archive the project from the Product menu.

      A successful archive looks something like this image:



   h. Select the **Distribute App** button and select **Custom**, and then **Enterprise** option.
   i. Select the **All compatible device variants** option from the drop-down menu next to App Thinning.
   j. Select the IOS in house profile and certificate.

      Let the Thinning app package load.
   k. Select export after successful processing.
   l. Once you click export, you can see a folder with all the app versions after thinning.
   m. Pick `siebel.ipa` from the list to use in the devices.

Or, the IPA file can be generated with the below commands.

- `xcodebuild clean archive -scheme siebel -configuration Release -archivePath <PROJECT_ROOT>/siebel/ios/deploy/iOSDebug/Destination_Root/Siebel.xcarchive -workspace siebel.xcworkspace DEVELOPMENT_TEAM='<value>' PROVISIONING_PROFILE='<value>'`

  Example:

  ```
  xcodebuild clean archive -scheme siebel -configuration Release -archivePath
  <PROJECT_ROOT>/siebel/ios/deploy/iOSDebug/Destination_Root/Siebel.xcarchive -workspace
  siebel.xcworkspace DEVELOPMENT_TEAM='VYAKS7W7VC' PROVISIONING_PROFILE='Oracle ENT2'
  CODE_SIGN_IDENTITY='iPhone Distribution: Oracle Corporation (Ent 2)'
  ```

- `xcodebuild -exportArchive -archivePath<PROJECT_ROOT>/siebel/ios/deploy/iOSDebug/Destination_Root/Siebel.xcarchive -exportPath Siebel.ipa -exportOptionsPlist iosExportOptions.plist -configuration Release`

To deploy on an IOS simulator:

In terminal, execute command `npx react-native run-ios` from `<PROJECT_ROOT>\RNMobile\siebel`.

Prepare the APK File

Navigate to and open file `<PROJECT_ROOT>\RNMobile\siebel\android\app\build.gradle`.

Search for **defaultConfig** section and replace **Release_Version** with appropriate build label.

On Windows laptops:

1. Find the `local.properties` file in the `<PROJECT_ROOT>\RNMobile\siebel\android` folder. Correct the path value for the `sdk.dir` parameter. This is required only for Android.

   Example: `sdk.dir=C:\\Users\\<Username>\\AppData\\Local\\Android\\Sdk`
2. Add following environment variables (the values are for your reference; use the relevant value, in your case) in the system variables section:
   a. Variable=ANDROID_HOME

      `Value=\Users\<Username>\AppData\Local\Android\Sdk`
   b. Variable=ANDROID_SDK_ROOT

      `Value - \Users\<Username>\AppData\Local\Android\Sdk`
   c. Variable=JAVA_HOME

      `Value - C:\Program Files\Java\jdk-11`
   d. Update Variable=Path with new values:

      `\Users\<Username>\AppData\Local\Android\Sdk\emulator\`

      `\Users\<Username>\AppData\Local\Android\Sdk\platform-tools\`
3. Search for the Windows Powershell in WIN programs. Right-click the mouse and open in Administration mode.
   a. Navigate to the folder path `<PROJECT_ROOT>\RNMobile\siebel\android`.
   b. Execute these commands:
      - `./gradlew clean`
      - `./gradlew build`
      - `./gradlew assembleRelease`

Generates the apk file in the path `<PROJECT_ROOT>\RNMobile\siebel\android\app\build\outputs\apk\release`.

To deploy on an Android emulator:

1. Execute the command `cd ..` (to move back to the root folder `c:\RNMobile\siebel`).
2. Execute the command `npx react-native run-android`.

   If you get the error `'react-native' is not recognized as an internal or external command, operable program or batch file`, then, execute the command `npm install -g react-native-cli`.

On Mac laptops:

1. Find the `local.properties` file in `<PROJECT_ROOT>\RNMobile\siebel\android` folder and correct the path value for the `sdk.dir`parameter.

   For example: `sdk.dir=/Users/{mac user}/Library/Android/sdk`.
2. In terminal, navigate to `<PROJECT_ROOT>\RNMobile\siebel\android` folder and execute these commands:
   - `chmod +x gradlew`
   - `./gradlew clean`
   - `./gradlew build`
   - `./gradlew assembleRelease`

     Generates apk file under path `<PROJECT_ROOT>\RNMobile\siebel\android\app\build\outputs\apk\release`

To deploy on an Android emulator:

In terminal, execute the command `npx react-native run-android` from `<PROJECT_ROOT>/siebel`.

Integrate with Native Device Features

Overview of Siebel Mobile Integration with Native Device Features

You can access and use these native device features from Siebel Mobile, if you download and configure the Siebel app first.

- **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 app setup 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 get accurate location data. See *Display Location Details in Siebel Mobile* and *Configure Privacy Settings for Native Device Features* for more information.

High-Level Steps to Integrate Siebel Mobile with Native Device Features

Follow these steps to integrate Siebel Mobile with the native features on your mobile device:

- *Download and Install the Siebel App*
- *Set Up the Host Server for Siebel Mobile*
- *Configure Single Sign-On for Siebel Mobile*
- *Configure Siebel Mobile on iOS and Android*
- *Reset the Host Server Using the Siebel App*
- *Manage Attachments Using the Siebel App*
- *Configure Privacy Settings for Native Device Features*

Set Up the Host Server for Siebel Mobile

You use the Siebel Management Console to configure the host server where Siebel Mobile applications are located.

Note: This task only applies only if you're using Siebel Innovation Pack 2017 or later.

The host address is configured in the following format:

```
https://host:port/siebel/v1.0/applicationlist
```

For example:

```
https://samplehost.com:636/siebel/v1.0/applicationlist
```

The host address connects to the application interface, which contains the application list information.

1. Sign in to the Siebel Management Console.
2. Select **Profiles** in the navigation menu in the side pane, and then select **Application Interface**.

   Existing Application Interface Profiles are listed, if any.
3. Select the application interface profile you want and do the following:

   a. Select **Applications** and then select the application you want to configure for Siebel Mobile (for example: epharma, sales, or service).

      When you select an application, the following options appear for the application: Basic Information, Mobile, Enhanced Authentication.

Configure Single Sign-On for Siebel Mobile

Siebel Mobile supports Single Sign-On (SSO) for connected applications.

> **Note:** SSO doesn't apply to Siebel Mobile disconnected applications because Siebel Mobile is used locally on the mobile device without connectivity. Siebel Mobile disconnected applications use the SQLite database to store data, metadata, and all the resource files to run the application.

Set Up SSO for Siebel Mobile

This task only applies only if you're using Siebel Innovation Pack 2017 or later:

1. Sign in to the Siebel Management Console.
2. Select **Profiles** in the navigation menu in the side pane, and then select **Application Interface**.

   Existing Application Interface Profiles are listed, if any.
3. Select the application interface profile you want to modify and then:

   a. Select **Applications**.
   b. Select the mobile application you want to configure for SSO (for example: epharmam, salesm, or servicem).

      When you select an application, the following options appear for the application: Basic Information, Mobile, Enhanced Authentication.
   c. Select the **Enhanced Authentication** option and then select the **Configure Web Single Sign-On (Web SSO)** checkbox.
   d. For Trust Token, specify the password to be used with SSO authentication.
   e. For User Specification, specify the user specification to use for SSO authentication.

      Repeat these steps for each mobile application you want to configure for SSO.
4. Select **Submit** to save your changes to the application interface profile.

Configure Siebel Mobile on iOS and Android

This procedure shows how to configure the Siebel app on iOS and Android devices. This involves dynamically connecting to a Siebel Server by entering the Siebel Mobile Application URL.

This procedure assumes that you've already downloaded and installed the Siebel app from either the Apple App Store for iOS devices or from Google Play for Android devices as described in *Download and Install the Siebel App*.

1. If not already done, set up the host server where Siebel Mobile applications are located as described in *Set Up the Host Server for Siebel Mobile*.

2. Start your iOS or Android device and then tap Siebel to start the Siebel app.
   In the Host section, enter the application URL as follows:

   ```
   https://<web site domain>/<objmgr>/<lang>
   ```

3. **Note:** For HTTPS setup, the CA Certificate used to trust the Siebel Web Server must be installed on all mobile devices (iOS and Android).

   Note: Use the Reset Application option to reset the server. For more information, see *Reset the Host Server Using the Siebel App*.

4. If this is your first time starting the Siebel app on your mobile device, accept the end-user license agreement.
5. Tap the **Go** button next to the host address to go to the sign-in page of the Siebel app.
6. Type in the user name and password credentials for the application, and then sign in.

   Note: Reset the application if you want to use different credentials for subsequent sign ins.

   After successful login, the application starts and is rendered as normal in the Siebel app. The following buttons appear inside 9 dot grid icon under the application banner and persist for all views in the application:
   - **Refresh button** for refreshing the page in the Siebel app.
   - **Attachment button** for going to the Attachment Manager view.
   - **Home button** for returning to the Home page of the Siebel app.

   Note: After successful login to Siebel Mobile disconnected applications, the Identifier is populated with a unique ID (Sync Node ID) identifying the application that was synchronized after successful login.

   Note: The Identifier doesn't apply to Siebel Mobile connected applications.

Reset the Host Server Using the Siebel App

You can reset the 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.

1. Start the Siebel app on your mobile device.
2. Select **Reset Application**, and then select **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 address field will be empty. For more information about connecting to the host server, see *Configure Siebel Mobile on iOS and Android*.

Manage Attachments Using the Siebel App

You can manage the download and upload of attachments using the Attachment Manager view.

The Attachments Manager view has the following tabs:

- **Download Attachments.** Lists all the attachments that have either finished downloading or are scheduled to download.
- **Upload Attachments.** Lists all the attachments that have either finished uploading or are scheduled to upload.

Each attachment record contains the following information:

- **Checkbox.** If checked, this indicates that the attachment record is selected for download or upload. If unchecked, the attachment record isn't selected.
- **List Order.** A number in the List Order field indicates the rank or sequence number for the attachment record. You can select and (without releasing the selection) then move each row to change the record sequence, or you can type in a number manually in the List Order field to change the record sequence.
- **Entity.** The attachment type.
- **File Name.** The name of the attachment record.
- **Size (KB).** The size of the attachment file.
- **Progress.** The attachment download or upload status.
    - The attachment download status can be one of the following: Not Downloaded, Queued for Download, Downloaded, File not Available, or Downloading.

      Downloading indicates that the attachment is actively downloading and a progress bar shows the progress of the task.
    - The attachment upload status can be one of the following: Not Uploaded, Queued for Upload, Uploaded, File not Available, or Uploading.

      Uploading indicates that the attachment is actively uploading and a progress bar shows the progress of the upload.
- **Speed.** The attachment download or upload speed.
- **Time Left.** The duration of time to complete the attachment download or upload.

> **Note:** The attachment functionality is supported in both online and offline mode. In offline mode, attachment upload and download is supported only when customers install the Siebel app or use the Siebel Mobile Archive file to create and deploy a customized Siebel app for iOS and Android devices. For more information, see *Download and Install the Siebel App*.

Manage Attachment Uploads

Use the Attachment Manager view in the Siebel app to manage attachment uploads.

The Attachment Manager view is available in online mode after the initial full upload is complete, and in offline mode to upload attachments during the sync process.

1. Sign in to the application where you want to manage attachment uploads.

   After successful sign in, the application starts and is rendered as normal in the Siebel app. The following buttons appear in the grid icon under the application banner and persist for all views in the application:

   Refresh, **Attachment**, and **Home**.

For more information about these buttons, see (step 6 in) *Configure Siebel Mobile on iOS and Android*.

2. Create attachment records, as required.

   For more information, see *Update Attachments for an Account* and *Update Attachments for a Contact*.
3. In the Siebel app, select the **Attachment** button to open the Attachment Manager view, and then select **Upload Attachments**.
4. Reorder the Upload Attachments list as required by typing in a number in the List Order field.
5. Select the checkbox next to each attachment record to select that record for download.
6. Select the **Upload Only on Wi-Fi** checkbox.
7. Select one of the following upload options, as required:

   - **Upload.** Select to queue the selected attachment records for upload.
   - **Remove.** Select to delete attachments belonging to the selected attachment records from the mobile device, and cancel any future uploads of or updates to the selected attachment records.

Manage Attachment Downloads

The Attachment Manager view is available in online mode after the initial full download is complete, and in offline mode to download attachments during the sync process.

Here's you how to manage the download of attachments using the Attachment Manager view in 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 downloads.

   After successful login, the application starts and is rendered as normal in the Siebel app. The following buttons appear under the application banner and persist for all views in the application: Refresh, Attachment, and Home.

   For more information about these buttons, see (step 6 in) *Configure Siebel Mobile on iOS and Android*.
3. Create attachment records as required.

   For more information, see *Update Attachments for an Account* and *Update Attachments for a Contact*.
4. In the Siebel app, tap the Attachment button to open the Attachment Manager view, and then tap Download Attachments.
5. Reorder the Download Attachments list as required by typing in a number in the List Order field.
6. Tap the checkbox next to each attachment record to select that record for download.
7. Tap the Download Only on Wi-Fi check box.
8. Choose one of the following download options as required:

   - **Download.** Tap to queue the selected attachment records for download.
   - **Remove.** Tap 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.

Configure Privacy Settings for Native Device Features

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

- *Configure Privacy Settings on iOS Devices for Siebel Mobile*
- *Configure Privacy Settings on Android Devices for Siebel Mobile*

Configure Privacy Settings on iOS Devices for Siebel Mobile

Here's how to configure the privacy settings for Siebel Mobile on iOS devices:

1. On your iOS device, navigate to the menu where you set location permissions. For example, select **Settings** > **Privacy** > **Location Services**.
2. Enable location services and save if required.

The map functionality is now enabled for Siebel Mobile. For more information about using the map functionality, see *Display Location Details in Siebel Mobile*.

Configure Privacy Settings on Android Devices for Siebel Mobile

Here's how to configure privacy settings for Siebel Mobile on Android devices:

1. On your mobile device, navigate to the menu where you set location permissions. For example, select **Settings** > **Location** > **Location services**.
2. Enable location services and save if required.

The map functionality is now enabled for Siebel Mobile. For more information about using the map functionality, see *Display Location Details in Siebel Mobile*.

6 Using the Siebel Mobile Application for Siebel Pharma

Overview of This Chapter

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Pharma can do.

Here are the topics:

- *Use the Home Page for Siebel Pharma*
- *Manage Calls for Siebel Pharma*
- *Manage Accounts for Siebel Pharma*
- *Manage Contacts for Siebel Pharma*
- *Manage Messaging Plans*
- *Use the Personalized Content Delivery Viewer in Siebel Pharma*
- *Task Flows for Siebel Pharma*
- *Unsupported Siebel Pharma Features in Offline Mode*

Note: The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see *Edit Items Inline*.

Use the Home Page for Siebel Pharma

These procedures related to using the home page of the Siebel Mobile application for Siebel Pharma are included in this section:

- *View Call Planning Information*
- *Schedule Calls for Contacts and Accounts*

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.

View Call Planning Information

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

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 Guide* .

1. Tap Side Menu and then tap Calls to display the following:
   - The calendar showing the call planning information in the main pane.
   - The Contacts and Accounts list in the side pane.

   Tap Contacts or Accounts to expand the corresponding contacts or accounts list.

   Note: You can perform the remaining steps in this task only in online mode.
2. On the calendar in the main pane, view the call planning information as follows:
   - Use the navigation 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 buttons 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 main pane, you can do the following:
   - To extend the duration of a call, select the border of the call and (without releasing the selection) then move the border out.
   - To move a call, select the call and (without releasing the selection) then move the call to a different time or date on the calendar.
   - To schedule a call for a contact or an account, see *Schedule Calls for Contacts and Accounts*.
   - Tap a call on the calendar to drill down on and display the call details. For more information, see *View Call Details*.

Schedule Calls for Contacts and Accounts

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

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 Guide* .

1. Tap Side Menu and then tap Calls to display the following:
   - The calendar showing the call planning information in the main pane.
   - The Contacts and Accounts list in the side pane.

     Tap Contacts or Accounts to expand the corresponding contacts or accounts list.

   Note: You can perform the remaining steps in this task only in online mode.
2. Schedule a new contact call as follows:
   a. Tap Contacts in the side pane to expand the contacts list, and then select a contact from the list.
   b. Select a contact and (without releasing the selection) then move the contact onto the calendar in the main pane.
   c. Drill down on the new call to open it.
   d. Modify the call details as required. For more information, see *Change Call Information*.
   e. Modify the related items for the call as required. For more information, see *View Call Details*.
3. Schedule a new account call as follows:
   a. Tap Accounts in the side pane to expand the accounts list, and then select a contact from the list.
   b. Select an account and (without releasing the selection) then move the account onto the calendar in the main pane.
   c. Drill down on the new call to open it.
   d. Modify the call details as required. For more information, see *Change Call Information*.
   e. Modify the related items for the call as required. For more information, see in *View Call Details*.

Manage Calls for Siebel Pharma

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

These procedures related to calls and call management are included in this section:

- *View Call Details*
- *Change Call Information*
- *Change Attendee Information for a Call*
- *Change Promotional Items for a Call*
- *Change Samples for a Call*
- *Change Product Details for a Call*
- *View Validation Results for a Call*
- *Add Literature Information to a Call*
- *View Presentation Detail Information for a Call*
- *Capture Signatures for Calls*
- *Submit a Call for Processing*

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.

View Call Details

Here's how to see call details using the calendar.

1. Tap Side Menu and then tap Calls to display the following:
    - The calendar showing the call planning information in the main pane.
    - The Contacts and Accounts list in the side pane.
2. Tap a call on the calendar in the main pane to open it and display the following:
    - The details for the selected call in the main pane.
    - A list in the side 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 side 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:
        - *View Call Planning Information*
        - *Schedule Calls for Contacts and Accounts*
    - **Attendees.** Shows the attendee information for the call. For more information, see *Change Attendee Information for a Call*.
    - **Promotional Items Dropped.** Shows the number of dropped promotional items for the call. For more information, see *Change Promotional Items for a Call*.
    - **Samples Dropped.** Shows the number of dropped samples for the call. For more information, see *Change Samples for a Call*.
    - **Product Details.** Shows the product details for the call. For more information, see *Change Product Details for a Call*.
    - **Validation Results.** Shows the validation results for the call. For more information, see *View Validation Results for a Call*.
    - **Literature.** Shows the literature information for the call. For more information, see *Add Literature Information to a Call*.
    - **Presentation Detail.** Shows the presentation detail information for the call. For more information, see *View Presentation Detail Information for a Call*.
4. To show a presentation for the selected call, tap the Detail button in the main pane. For more information, see *Show Presentations in Siebel Mobile*.

Change Call Information

Here's how to change call information.

1. Tap Side Menu and then tap Calls to display the following:
   - The calendar showing the call planning information in the main pane.
   - The Contacts and Accounts list in the side pane.
2. Update an existing call as follows:
   a. Tap a call on the Calendar in the main pane to open it and display the following:
      - The details for the selected call in the main pane.
      - A list in the side 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 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. When you create a call in offline mode for a new contact or account, this field is not populated with the primary address. You must select the address from the list that appears.
Start Date	Select the call start date and time.
Call Duration	Select the number of minutes for the call duration.

3. To schedule a new call, see *Schedule Calls for Contacts and Accounts*.

Change Attendee Information for a Call

Here's how to change 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.

1. Tap Side Menu and then tap Calls to display the following:
    - The calendar showing the call planning information in the main pane.
    - The Contacts and Accounts list in the side pane.
2. Tap a call on the calendar in the main pane to open it and display the following:
    - The details for the selected call in the main pane.
    - A list in the side pane in which you can select the related items for the call.
3. Update an existing call attendee as follows:
    a. Tap Attendees in the list in the side pane.

       All attendees associated with the call appear in the Attendees list in the main pane.
    b. Tap the attendee that you want to update.
    c. Tap the record field that you want to update, and update the field value.

       You must navigate away from the record to save your changes to it.
4. Add an attendee to the call as follows:
    a. Tap Attendees in the list in the side pane, and then tap Add (the plus (+) icon) in the main pane.
    b. 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.

       Note: The search filter for affiliated contacts is supported only in online mode.
5. Add promotional items and samples to the call and capture a signature for the call as follows:
    a. Tap Attendees in the list in the side pane, and then drill down on the attendee Name.
    b. Add promotional items and samples to the call as required. For more information, see the following topics:
        - *Change Promotional Items for a Call*
        - *Change Samples for a Call*
    c. Capture a signature for the call as required. For more information, see *Capture Signatures for Calls*.

Change Promotional Items for a Call

Here's how to change 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 change 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.

1. Tap Side Menu and then tap Calls to display the following:
    - The calendar showing the call planning information in the main pane.
    - The Contacts and Accounts list in the side pane.
2. Tap a call on the calendar in the main pane to open it and display the following:
    - The details for the selected call in the main pane.
    - A list in the side 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 side pane.

       All promotional items associated with the call appear in the Promotional Items Dropped list in the main pane.
    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 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 side pane, and then tap Add in the main pane.
    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.

Change Samples for a Call

Here's how to change 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 change 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.

1. Tap Side Menu and then tap Calls to display the following:
    - The calendar showing the call planning information in the main pane.
    - The Contacts and Accounts list in the side pane.
2. Tap a call on the calendar in the main pane to open it and display the following:
    - The details for the selected call in the main pane.
    - A list in the side 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 side pane.

    All samples associated with the call appear in the Samples Dropped list in the main pane.
    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 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 side pane, and then tap Add in the main pane.
    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.

Field Name	Description
Quantity	Type the quantity of the sample to give to the call customer.

Change Product Details for a Call

Here's how to change the product details for a call.

Product details indicate the priority of each product associated with the call. You identify 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 change 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.

1. Tap Side Menu and then tap Calls to display the following:
    - The calendar showing the call planning information in the main pane.
    - The Contacts and Accounts list in the side pane.
2. Tap a call on the calendar in the main pane to open it and display the following:
    - The details for the selected call in the main pane.
    - A list in the side 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 side pane.

    All detail products associated with the call appear in the Products Detailed list in the main pane.
    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 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 side pane, and then tap Add in the main pane.
    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.

Field Name	Description
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.

View 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'll be unable to sign or submit the call for processing.

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

    All validation results showing any errors in the call data appear in the Validation Results list in the main pane.

Add Literature Information to a Call

Here's how to add literature information to a call.

Literature information includes sales and marketing literature, such as product brochures, technical reference papers, and data sheets. The following file types are supported: GIF, JPEG, JPG, MP4, PDF, PNG, HTML, and ZIP.

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

1. Tap Side Menu and then tap Calls to display the following:
    - The calendar showing the call planning information in the main pane.
    - The Contacts and Accounts list in the side pane.
2. Tap a call on the calendar in the main pane to open it and display the following:
    - The details for the selected call in the main pane.
    - A list in the side pane in which you can select the related items for the call.
3. Add literature to the call as follows:
    - Tap Literature in the list in the side pane.

      All literature associated with the call appears in the Literature list in the main pane.
    - Tap Add (the plus (+) icon) in the main pane, choose the literature item on the list that appears, and then tap OK.

View Presentation Detail Information for a Call

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

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

   All presentation items (messaging plans, messaging plan items, and related items) associated with the call appear in the Presentation Details list in the main pane.

   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).

Field Name	Description
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.

Capture Signatures for Calls

After you enter all 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 can't update the dropped samples associated with it.

1. Tap Side Menu and then tap Calls to display the following:
    - The calendar showing the call planning information in the main pane.
    - The Contacts and Accounts list in the side pane.
2. Tap a call on the calendar in the main pane to open it and display the following:
    - The details for the selected call in the main pane.
    - A list in the side pane in which you can select the related items for the call.
3. Tap Sign in the main pane.

    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.

Submit a Call for Processing

After you complete all 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.

1. Tap Side Menu and then tap Calls to display the following:
   - The calendar showing the call planning information in the main pane.
   - The Contacts and Accounts list in the side pane.
2. Tap a call on the calendar in the main pane to open it and display the following:
   - The details for the selected call in the main pane.
   - A list in the side 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.

Manage 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.

These procedures related to accounts and account management are included in this Section:

- *View Account Details*
- *Change Account Information*
- *Change Contact Information for an Account*
- *Change Call Information for an Account*
- *Change Address Information for an Account*
- *Change Contact Affiliation Information for an Account*
- *Change Account Relationship Information for an Account*
- *Update Attachments for an Account*

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.

View Account Details

Here's how to see account details using the Accounts list.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.

- A list in the side 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 after the list in the main pane.
3. To view the related items for the selected account, tap the following names in the list in the side pane:
   - **Contacts.** Shows the contact information for the account. For more information, see *Change Contact Information for an Account*.
   - **Calls.** Shows the call information for the account. For more information, see *Change Call Information for an Account*.
   - **Addresses.** Shows the address information for the account. For more information, see *Change Address Information for an Account*.
   - **Contact Affiliations.** Shows the contact affiliation information for the account. For more information, see *Change Contact Affiliation Information for an Account*.
   - **Account Relationships.** Shows the account relationship information for the account. For more information, see *Change Account Relationship Information for an Account*.
   - **Attachments.** Shows the attachments for the account. For more information, see *Update Attachments for an Account* .
4. To show a presentation for the selected account, tap the Detail button in the main pane. For more information, see *Show Presentations in Siebel Mobile*.

Change Account Information

Here's how to change account information.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
3. Create a new account as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new account in the fields that appear, and then save the record.

Change Contact Information for an Account

Here's how to change the contact information for an account.

1. Tap Side Menu and then tap Accounts to display the following:

- The Accounts list and details for the selected account in the main pane.
- A list in the side 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 after the list in the main pane.
3. Update an existing account contact as follows:

   a. Tap Contacts in the list in the side pane.

      All contacts associated with the account appear in the Contacts list in the main pane.
   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 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 side pane, and then tap Add (the plus (+) icon) in the main pane.
   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 side pane, tap Add (the plus (+) icon) in the main pane, and then tap New (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.

Change Call Information for an Account

You can update calls that aren't yet submitted for processing.

Here's how to change the call information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing account call as follows:

   a. Tap Calls in the list in the side pane.

      All calls associated with the account appear in the Calls list in the main pane.
   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 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 side pane, and then tap New (the plus (+) icon) in the main pane.

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.

Change Address Information for an Account

Here's how to change address information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing account address as follows:
   a. Tap Addresses in the list in the side pane.
      All addresses associated with the account appear in the Addresses list in the main pane.
   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 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 side pane, and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the address on the list that appears, and then tap OK.

> **Note:** In the case of child views where records are being associated, you can associate only a downloaded address with a selected account in offline mode.

5. Create a new account address as follows:
   a. Tap Addresses in the list in the side pane, tap Add (the plus (+) icon) in the main pane, and then tap New (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.

> **Note:** Creating new records on this screen is supported only in online mode.

Change Contact Affiliation Information for an Account

Here's how to change contact affiliation for an account.

You can also affiliate accounts with a contact. For more information, see *Change Account Affiliation Information for a Contact*.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing contact affiliation as follows:
   a. Tap Affiliations in the list in the side pane.

      All affiliations associated with the account appear in the Affiliations list in the main pane.
   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 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 side pane, and then tap New (the plus (+) icon).
   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.

Field Name	Description
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.

Change Account Relationship Information for an Account

Here's how to change the account relationship information for an account.

This information denotes the relationship between the account and another account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing account relationship as follows:
   a. Tap Relationships in the list in the side pane.

      All relationships associated with the account appear in the Relationships list in the main pane.
   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 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 side pane, and then tap New (the plus (+) icon) in the main pane.
   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.

Field Name	Description
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.

Update Attachments for an Account

You can change the attachment information for an account using the New File and New URL links.

Note the following:

- Examples of file types that you can attach include Microsoft Outlook email messages, Microsoft Word documents, image files, and videos.
- With iOS devices (such as iPad), you can attach files from the gallery and also from other folders in the device, like Downloads, by browsing. You can also use the camera on the device to take a photo or record a video.
- With non-iOS devices (such as Samsung Galaxy tablets), you can attach files using Bluetooth or the file browser, if Siebel Mobile has been integrated with the file system on the mobile device. If the mobile application isn't integrated with the file system on your mobile device, then you can't upload and download attachment files. For more information, see *Overview of Siebel Mobile Integration with Native Device Features*.

Note: The attachment functionality is supported in both online and offline mode. In offline mode, attachments are supported only when customers install the Siebel app or use the Siebel Mobile Archive file to create and deploy a customized Siebel Mobile Application Container for iOS and Android devices. For more information, see *Download and Install the Siebel App*.

Update Attachments for an Account

1. Select **Side Menu** and then **Accounts** to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side pane in which you can select the related items for accounts.
2. Select an account in the Accounts list.

   All details for the selected account appear after the list in the main pane.
3. Update an existing attachment (file or URL) as follows:
   a. Select **Attachment** in the list in the side pane.

      All attachments associated with the account appear in the Attachments list in the main pane.
   b. Select the attachment that you want to update.
   c. Select the record field that you want to update, and update the field value.

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:

        - Select **Attachment** in the list in the side pane, and then tap the New File button.
        - Select **Choose Existing**, select an existing file to attach to the record, and then tap **OK**.

    b. To attach a new photo or video:

        - Select **Attachment** in the list in the side pane, and then select the **New File** button.
        - Select **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, select the attachment name link.

        A dialog box appears with following options:

        i. Select **Copy** to copy the resource in clipboard and use it to paste it to other apps or add to your local folders.
        ii. Select **Quick Look** to quickly check open the file and view it in a window.
        iii. Select **Save Image** to save the file attachment to phone storage.
        iv. Select **Assign to Contact** to associate the file attachment with a contact, if the file is of image type.
        v. Select **Print** to print the document.
        vi. Select **Add to Shared Album** to create shared album folder and sync to iCloud.
        vii. Select **Save to File** to save the file attachment to phone storage.

        You can provide any file-name to save it in the mobile storage area.
        viii. Select **Add Tags** to associate search keyword with the file attachment.

5. If using a non-iOS device (such as a 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:

        - Select **Attachment** in the list in the side pane, and then select the **New File** button.
        - Browse to and select the file that you want to upload, and then tap **OK**.

    b. To open an attachment file, select the attachment name link. Based on the file extension type, please select the most appropriate app to open the attachment.

6. Attach a new URL address as follows:

    a. Select **Attachment** in the list in the side pane, and then select the **New URL** button.
    b. Type the URL address in the URL field, and then select **Add**.
    c. To navigate to an existing URL address, select the URL attachment name link.

Manage 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.

Here are the topics in this section:

- *View Contact Details*
- *Change Contact Information*
- *Change Call Information for a Contact*
- *Change Address Information for a Contact*
- *Change Best Time Information for a Contact*
- *Change State License Information for a Contact*
- *Change Account Affiliation Information for a Contact*
- *Change Contact Relationship Information for a Contact*
- *Update Attachments for a Contact*

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.

View Contact Details

Here's how to see contact details using the Contacts list.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected contact, tap the following names in the list in the side pane:
    - **Calls.** Shows the calls for the contact. For more information, see *Change Call Information for a Contact*.
    - **Addresses.** Shows the address information for the contact. For more information, see *Change Address Information for a Contact*.
    - **Best Times.** Shows the best-time-to-call information for the contact. For more information, see *Change Best Time Information for a Contact*.
    - **State Licenses.** Shows the state license information for the contact. For more information, see *Change State License Information for a Contact*.
    - **Account Affiliations.** Shows the account affiliation information for the contact. For more information, see *Change Account Affiliation Information for a Contact*.
    - **Contact Relationships.** Shows the contact relationship information for the contact. For more information, see *Change Contact Relationship Information for a Contact*.
    - **Attachments.** Shows the attachments for the account. For more information, see *Update Attachments for a Contact*.
4. To show a presentation for the selected contact, tap the Detail button in the main pane. For more information, see *Show Presentations in Siebel Mobile*.

Change Contact Information

Here's how to modify contact information.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 after the list in the main pane.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
3. Create a new contact as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new contact in the fields that appear, and then save the record.

Change Call Information for a Contact

Here's how to modify call information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing contact call as follows:
   a. Tap Calls in the list in the side pane.

      All calls associated with the contact appear in the Calls list in the main pane.
   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 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 side pane, and then tap New (the plus (+) icon) in the main pane.
   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.
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.

Change Address Information for a Contact

Here's how to modify the address information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected call in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing contact address as follows:
   a. Tap Addresses in the list in the side pane.

      All addresses associated with the contact appear in the Addresses list in the main pane.
   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 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 side pane, and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the address on the list that appears, and then tap OK.

> **Note:** In the case of child views where records are being associated, you can associate only a downloaded address with a selected contact in offline mode.

5. Create a new contact address as follows:
   a. Tap Addresses in the list in the side pane, tap Add (the plus (+) icon) in the main pane, and then tap New (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.

> **Note:** Creating new records on this screen is supported only in online mode.

Change Best Time Information for a Contact

Here's how to modify the best-time-to-call information for a contact. This information typically applies to a contact who's a physician or another health-care provider. It's associated with an address for the contact.

> **Note:** The best-time slot for a contact doesn't 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 doesn't 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.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing contact best-time as follows:
   a. Tap Best Times in the list in the side pane.
      All best times associated with the contact appear in the Best Times list in the main pane.
   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 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 side pane, and then tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new best time in the fields that appear, and then save the record.

Change State License Information for a Contact

Here's how to modify the state license information for a contact. This information typically applies to a contact who's a physician or another health-care provider.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.

- A list in the side 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 after the list in the main pane.
3. Update an existing contact state license as follows:

   a. Tap State Licenses in the list in the side pane.

      All state licenses associated with the contact appear in the Licenses list in the main pane.
   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 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 side pane, and then tap New (the plus (+) icon) in the main pane.
   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.

Change Account Affiliation Information for a Contact

Here's how 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 *Change Contact Affiliation Information for an Account*.

1. Tap Side Menu and then tap Contacts to display the following:

   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 after the list in the main pane.

3. Update an existing account affiliation as follows:
    a. Tap Affiliations in the list in the side pane.

       All affiliations associated with the contact appear in the Affiliations list in the main pane.
    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 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 side pane, and then tap New (the plus (+) icon) in the main pane.
    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.

Change Contact Relationship Information for a Contact

Here's how to modify the contact relationship information for a contact. This information denotes the relationship or role that exists between the contact and another contact.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 after the list in the main pane.

3. Update an existing contact relationship as follows:
   a. Tap Relationships in the list in the side pane.

      All relationships associated with the contact appear in the Relationships list in the main pane.
   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 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 side pane, and then tap New (the plus (+) icon) in the main pane.
   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.

Update Attachments for a Contact

You can update attachments for a contact using the New File and New URL links.

Note the following:

- Examples of file types that you can attach include Microsoft Outlook email messages, Microsoft Word documents, image files, and videos.
- 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 attach files using Bluetooth or the file browser, if Siebel Mobile has been integrated with the file system on the mobile device. If the mobile application isn't integrated with the file system on your mobile device, then you can't upload and download attachment files. For more information, see *Overview of Siebel Mobile Integration with Native Device Features*.

Note: The attachment functionality is supported in both online and offline mode. In offline mode, attachments are supported only when customers install the Siebel app or use the Siebel Mobile Archive file to create and deploy a customized Siebel Mobile Application Container for iOS and Android devices. For more information, see *Download and Install the Siebel App*.

Update Attachments for a Contact

1. Select **Side Menu** and then **Contacts** to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side pane in which you can select the related items for contacts.
2. Select a contact in the Contacts list.

   All details for the selected contact appear after the list in the main pane.
3. Update an existing attachment (file or URL) as follows:
   a. Select **Attachment** in the list in the side pane.

      All attachments associated with the contact appear in the Attachments list in the main pane.
   b. Select the attachment that you want to update.

c. Select the record field that you want to update, and update the field value.

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:
      - Select **Attachment** in the list in the side pane, and then tap the New File button.
      - Select **Choose Existing**, select an existing file to attach to the record, and then tap **OK**.
   b. To attach a new photo or video:
      - Select **Attachment** in the list in the side pane, and then select the **New File** button.
      - Select **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, select the attachment name link.

      A dialog box appears with following options:
      i. Select **Copy** to copy the resource in clipboard and use it to paste it to other apps or add to your local folders.
      ii. Select **Quick Look** to quickly check open the file and view it in a window.
      iii. Select **Save Image** to save the file attachment to phone storage.
      iv. Select **Assign to Contact** to associate the file attachment with a contact, if the file is of image type.
      v. Select **Print** to print the document.
      vi. Select **Add to Shared Album** to create shared album folder and sync to iCloud.
      vii. Select **Save to File** to save the file attachment to phone storage.

      You can provide any file-name to save it in the mobile storage area.
      viii. Select **Add Tags** to associate search keyword with the file attachment.
5. If using a non-iOS device (such as a 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:
      - Select **Attachment** in the list in the side pane, and then select the **New File** button.
      - Browse to and select the file that you want to upload, and then tap **OK**.
   b. To open an attachment file, select the attachment name link. Based on the file extension type, please select the most appropriate app to open the attachment.
6. Attach a new URL address as follows:
   a. Select **Attachment** in the list in the side pane, and then select the **New URL** button.
   b. Type the URL address in the URL field, and then select **Add**.
   c. To navigate to an existing URL address, select the URL attachment name link.

Manage Messaging Plans

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

These procedures are related to messaging plans and presentation management:

- *View Messaging Plan Details*
- *Use the Personalized Content Delivery Viewer in Siebel Pharma*

View Messaging Plan Details

Here's how to see messaging plan (presentation) details using the Messaging Plans list.

1. Tap Side Menu on the application banner, and then tap Messaging Plans.
   The Messaging Plan list appears in the main pane.
2. Tap a messaging plan in the Messaging Plan list.
   All details for the selected messaging plan appear after the list in the main pane.
3. Tap the Detail button in the main pane.
   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 start of the page.
   - The messaging plan items (presentation items or slides), which are associated with the selected messaging plan, appear next in thumbnail format.
     Tap the Related label for a messaging plan item to show the related messages for that item (if there are any).
   - For more information about the Launch, Generate (for connected applications only) and Related buttons on the messaging plan preview page, see *Show Presentations in Siebel Mobile*.
   - Tap Exit to return to the Messaging Plan list page.
4. Drill down on the messaging plan link name in the Name field.
   All presentation items followed by the related messages associated with the selected messaging plan appear in main pane after the messaging plan details.

Use the Personalized Content Delivery Viewer in Siebel Pharma

You use the Personalized Content Delivery Viewer (PCD Viewer) in Siebel Mobile and in 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.

The PCD Viewer is available in Siebel Pharma and by default for Calls, Accounts, Contacts, and Messaging Plans in the Siebel Mobile application for Siebel Pharma.

You start the viewer by selecting the **Detail** button. However, you can use the PCD Viewer on any other applet in the mobile application if 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* .

Note: For Siebel Mobile, the PCD Viewer is supported only if using the Siebel Mobile Archive 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 *Download and Install the Siebel App*.

Before using the PCD Viewer in Siebel Mobile:

- Plan for presentation delivery by reviewing the available messaging plans and any existing call presentation information. For more information, see *Manage Messaging Plans* and *View Presentation Detail Information for a Call*.
- 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.
- Configure the server location where you want to store messaging plan contents (presentation items, related messages, and HTML ZIP files). For more information, see *Set the Server Uncompression Location*.

  Note: This task applies only if using Siebel Mobile in online mode.

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

- *Show Presentations in Siebel Mobile*
- *Record Responses to Presentations in Siebel Mobile*

For more information about using personalized content delivery in Siebel CRM, see *Siebel Life Sciences Guide* .

Show 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.

1. Navigate to one of the following views:
   - **Call Details view.** Tap Side Menu, tap Calls, and then drill down on a call in the calendar in the main pane. For more information, see *View Call Details*.
   - **Account Details view.** Tap Side Menu, tap Accounts, and then select an account in the Accounts list in the main pane. For more information, see *View Account Details*.
   - **Contact Details view.** Tap Side Menu, tap Contacts, and then select a contact in the Contacts list in the main pane. For more information, see *View Contact Details*.
   - **Messaging Plans view.** Tap Side Menu, tap Messaging Plans, and then select a messaging plan in the Messaging Plans list in the main pane. For more information, see *View Messaging Plan Details*.
2. Tap the Detail button in the main pane.
   The messaging plan preview page that opens contains the following information:
   a. A list of all accessible messaging plans (presentations), which are released and unexpired, appears at the start of the page.
   b. The messaging plan items (presentation items or slides), which are associated with the selected messaging plan, appear next in thumbnail format.
      Tap the Related label for a messaging plan item to show the related messages for that item (if there are any).

c. 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.
d. 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 *Set the Server Uncompression Location*.

Note: Step 2c and 2d apply only to Siebel Mobile connected (online) applications.

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 end 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 start 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 *Record Responses to Presentations in Siebel Mobile*.
      - **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 *Record Responses to Presentations in Siebel Mobile*.
      - **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.

Record 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've 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.

1. Tap Done when you've 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 after the Contact list in thumbnail format. For more information about showing presentations, see *Show Presentations in Siebel Mobile*.
2. Capture the customer rating for each presentation item as follows:

   a. Tap the appropriate number of stars after 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 after each presentation item where the flip switch is set to Yes. The significance of each star is shown in the previous substep.

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 *View Presentation Detail Information for a Call*.

A record for the product associated with the messaging plan is also created under Products Detailed for the call. For more information, see *Change Product Details for a Call*.

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.

Set the Server Uncompression Location

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

Note: This task applies only if using Siebel Mobile in online mode.

1. Sign 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.

   The path for decompressed files is `filesystem/assets`.

Note: Before redeploying the siebel.war file or restarting tomcat server, it is recommended that you back up the files in `AI_INSTALL\applicationcontainer_external\siebelwebroot\files` and manually replace them after redeploying the siebel.war file.

Task Flows for Siebel Pharma

Siebel Pharma task flows that sales representatives typically carry out are divided into these areas:

- *Plan and Prepare for Customer Calls*
- *Conduct Customer Calls*

Plan and Prepare for Customer Calls

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

- Check the appointments and review the route for the day. For more information, see *View Call Planning Information* and *Display Location Details in Siebel Mobile*.
- Review the notifications list. For more information, see *Review Notification Messages in Siebel Mobile*.
- 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:
    - *View Contact Details*
    - *Change Contact Information*
  - Review, modify, and create new contact calls as required. For more information, see *Change Call Information for a Contact*.
  - 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:
    - *Change Address Information for a Contact*
    - *Change Best Time Information for a Contact*
    - *Change State License Information for a Contact*
    - *Change Account Affiliation Information for a Contact*
    - *Change Contact Relationship Information for a Contact*
    - *Update Attachments for a Contact*
- 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:
    - *View Account Details*
    - *Change Account Information*
  - Review, modify, and create new account calls as required. For more information, see *Change Call Information for an Account*.
  - Review and modify as required the account's associated contacts, addresses, affiliated contacts, account relationships, and attachments. For more information, see the following:
    - *Change Contact Information for an Account*
    - *Change Address Information for an Account*
    - *Change Contact Affiliation Information for an Account*
    - *Change Account Relationship Information for an Account*

- *Update Attachments for an Account*

Conduct 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:
  - *Change Attendee Information for a Call*
  - *View Call Details*
  - *Change Call Information*
- 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:
  - *Change Attendee Information for a Call*
  - *Change Promotional Items for a Call*
  - *Change Samples for a Call*
  - *Change Product Details for a Call*
  - *Add Literature Information to a Call*
  - *View Presentation Detail Information for a Call*
- Deliver personalized content and presentations to customers and capture feedback as required. For more information, see *Use the Personalized Content Delivery Viewer in Siebel Pharma*.
- Record signatures for calls. For more information, see *Capture Signatures for Calls*.
- Submit calls for processing. For more information, see *Submit a Call for Processing*.
- Review the validation results for a call as required to determine any errors in the call data. For more information, see *Manage Accounts for Siebel Pharma*.

Unsupported Siebel Pharma Features in Offline Mode

The features listed in this topic aren't supported in offline mode in the Siebel Mobile disconnected application for Siebel Pharma.

You must be connected to the internet and, in some cases, to the Siebel Server to do the following in your Siebel Mobile disconnected application for Siebel Pharma:

- Use the search filter for the affiliated contacts (when adding Attendees)

  For more information, see *Change Attendee Information for a Call*.
- Directly create new address records for accounts or contacts

  In the case of child views where records are being associated, you can associate only a downloaded address with a selected account or contact in offline mode. For more information, see *Change Address Information for an Account* and *Change Address Information for a Contact*

For more information about the general features that aren't supported in offline mode, see *Unsupported Siebel Sales Features in Offline Mode*.

7 Using the Siebel Mobile Application for Siebel Sales

Overview of This Chapter

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Sales can run.

It includes these topics:

- *Manage Accounts in Siebel Sales*
- *Manage Contacts in Siebel Sales*
- *Manage Leads in Siebel Sales*
- *Manage Opportunities in Siebel Sales*
- *Manage Quotes in Siebel Sales*
- *Manage Orders in Siebel Sales*
- *Manage Activities in Siebel Sales*
- *Unsupported Siebel Sales Features in Offline Mode*

Note: The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see *Edit Items Inline*.

Manage Accounts in 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.

These procedures are included in this section:

- *View Account Details*
- *Change Account Information*
- *Change Contact Information for an Account*
- *Change Opportunity Information for an Account*
- *Change Address Information for an Account*
- *Change Activity Information for an Account*
- *Change Account Team Information for an Account*

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

View Account Details

Here's how to see account details using the Accounts list.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected account, tap the following names in the list in the side pane:
   - **Contacts.** Shows the contact information for the account. For more information, see *Change Contact Information for an Account*.
   - **Opportunities.** Shows the opportunity information for the account. For more information, see *Change Opportunity Information for an Account*.
   - **Addresses.** Shows the address information for the account. For more information, see *Change Address Information for an Account*.
   - **Activities.** Shows the activity information for the account. For more information, see *Change Activity Information for an Account*.
   - **Account Team.** Shows the account team information for the account. For more information, see *Change Account Team Information for an Account*.

Change Account Information

Here's how to modify account information.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
3. Create a new account as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new account in the fields that appear, and then save the record.

Change Contact Information for an Account

Here's how to modify the contact information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing account contact as follows:
   a. Tap Contacts in the list in the side pane.

      All contacts associated with the account appear in the Contacts list in the main pane.
   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 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 side pane, and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the contact on the list that appears, and then tap OK.

   > **Note:** In the case of child views where records are being associated, you can associate only a downloaded contact with a selected account in offline mode.
5. Create a new account contact as follows:
   a. Tap Contacts in the list in the side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new contact in the fields that appear, and then save the record.

   > **Note:** Creating new records on this screen is supported only in online mode.

Change Opportunity Information for an Account

Here's how to modify the opportunity information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing account opportunity as follows:

a. Tap Opportunities in the list in the side pane.

   All opportunities associated with the account appear in the Opportunities list in the main pane.
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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   b. Enter the information for the new opportunity in the fields that appear, and then save the record.

Change Address Information for an Account

Here's how to modify the address information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing account address as follows:

   a. Tap Addresses in the list in the side pane.

      All addresses associated with the account appear in the Addresses list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the Address on the list that appears, and then tap OK.

   > **Note:** In the case of child views where records are being associated, you can associate only a downloaded address with a selected account in offline mode.

5. Create a new account address as follows:

   a. Tap Addresses in the list in the side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new address in the fields that appear, and then save the record.

   > **Note:** Creating new records on this screen is supported only in online mode.

Change Activity Information for an Account

Here's how to modify the activity information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details for the selected account in the main pane.
    - A list in the side 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 after the list in the main pane.
3. Update an existing account activity as follows:
    a. Tap Activities in the list in the side pane.

        All activities associated with the account appear in the Activities list in the main pane.
    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 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 side pane then tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new activity in the fields that appear, and then save the record.

Change Account Team Information for an Account

Here's how to modify the account team information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details for the selected account in the main pane.
    - A list in the side 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 after the list in the main pane.

3. Update an existing account team as follows:
   a. Tap Account Team in the list in the side pane.

      All team members associated with the account appear in the Account Team list in the main pane.
   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.

   Note: You can update the Primary check box only in online mode.
4. Add an existing person to the account team as follows:
   a. Tap Account Team in the list in the side pane and then tap Add (the plus (+) icon) in the main pane.
   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.

These procedures are included in this section:

- *View Contact Details*
- *Change Contact Information*
- *Change Opportunity Information for a Contact*
- *Change Contact Team Information for a Contact*
- *Change Address Information for a Contact*

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

Displaying Contact Details

Here's how to see contact details using the Contacts list.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 after the list in the main pane.

3. To view the related items for the selected contact, tap the following names in the list in the side pane:
    - **Opportunities.** Shows the opportunity information for the contact. For more information, see *Change Opportunity Information for a Contact*.
    - **Contact Team.** Shows the contact team information for the contact. For more information, see *Change Contact Team Information for a Contact*.
    - **Addresses.** Shows the address information for the contact. For more information, see *Change Address Information for a Contact*.

Modifying Contact Information

Here's how to modify contact information.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 after the list in the main pane.
    b. Tap the record field that you want to update, and update the field value.
    You must navigate away from the record to save your changes to it.
3. Create a new contact as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new contact in the fields that appear, and then save the record.

Modifying Opportunity Information for a Contact

Here's how to modify the opportunity information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 after the list in the main pane.
3. Update an existing contact opportunity as follows:
    a. Tap Opportunities in the list in the side pane.
    All opportunities associated with the contact appear in the Opportunities list in the main pane.
    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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the opportunity on the list that appears, and then tap OK.

   Note: In the case of child views where records are being associated, you can associate only a downloaded opportunity with a selected contact in offline mode.

5. Create a new contact opportunity as follows:
   a. Tap Opportunities in the list in the side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new opportunity in the fields that appear, and then save the record.

   Note: Creating new records on this screen is supported only in online mode.

Modifying Contact Team Information for a Contact

Here's how to modify the contact team information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing contact team as follows:
   a. Tap Contact Team in the list in the side pane.

      All team members associated with the contact appear in the Contact Team list in the main pane.
   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.

      Note: You can update the Primary check box only in online mode.

4. Add an existing person to the contact team as follows:
   a. Tap Contact Team in the list in the side pane and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the person on the list that appears, and then tap OK.

Modifying Address Information for a Contact

Here's how to modify the address information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing contact address as follows:
   a. Tap Addresses in the list in the side pane.

      All addresses associated with the contact appear in the Addresses list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the address on the list that appears, then tap OK.

   Note: In the case of child views where records are being associated, you can associate only a downloaded address with a selected contact in offline mode.
5. Create a new contact address as follows:
   a. Tap Addresses in the list in the side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new address in the fields that appear, and then save the record.

   Note: Creating new records on this screen is supported only in online mode.

Managing Leads for Siebel Sales

A lead is a new prospect or existing customer who might become an opportunity.

These procedures are included in this section:

- *View Lead Details*
- *Change Lead Information*
- *Change Opportunity Information for a Lead*
- *Convert a Lead to an Opportunity*

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

Displaying Lead Details

Here's how to see lead details using the Leads list.

1. Tap Side Menu and then tap Leads to display the following:
    - The Leads list and details for the selected lead in the main pane.
    - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected lead, tap the following name in the list in the side pane:
    - **Opportunities.** Shows the opportunity information for the lead. For more information, see *Change Opportunity Information for a Lead*.

Modifying Lead Information

Here's how to modify lead information.

1. Tap Side Menu and then tap Leads to display the following:
    - The Leads list and details for the selected lead in the main pane.
    - A list in the side 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 after the list in the main pane.
    b. Tap the record field that you want to update, and update the field value.

    You must navigate away from the record to save your changes to it.
3. Create a new lead as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new lead in the fields that appear, and then save the record.

Modifying Opportunity Information for a Lead

Here's how to modify the opportunity information for a lead.

1. Tap Side Menu and then tap Leads to display the following:
   - The Leads list and details for the selected lead in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing lead opportunity as follows:
   a. Tap Opportunities in the list in the side pane.

      All opportunities associated with the lead appear in the Opportunities list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the opportunity on the list that appears, and then tap OK.

   Note: In the case of child views where records are being associated, you can associate only a downloaded opportunity with a selected lead in offline mode.
5. Create a new lead opportunity as follows:
   a. Tap Opportunities in the list in the side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new opportunity in the fields that appear, and then save the record.

   Note: Creating new records on this screen is supported only in online mode.

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 the *Siebel Marketing User Guide*.

1. Tap Side Menu and then tap Leads to display the following:
   - The Leads list and details for the selected lead in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Tap Convert to convert the lead to an opportunity.

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.

Field Mapping When Converting a Lead to an Opportunity (Offline Mode Only)

The following table shows the field mapping used when converting a Lead to an Opportunity in offline mode.

Lead BC Fields	Opportunity BC Fields
[Description]+[Id]+Timestamp	Name
Account Id	Account Id
Contact Id	Key Contact Id
Primary Position Id	Primary Position Id
Primary Organization Id	Primary Organization Id
Quality	Quality

The field mapping for Prospect to Contact creation is shown in the following table.

List Mgmt Prospective Contact BC Fields	Contact BC Fields
Last Name	Last Name
First Name	First Name
Home Phone #	Home Phone #
Work Phone #	Work Phone #
Cellular Phone #	Cellular Phone #
Fax Phone #	Fax Phone #
Email Address	Email Address

List Mgmt Prospective Contact BC Fields	Contact BC Fields
Id	Person Uld

Managing Opportunities for Siebel Sales

An opportunity is a potential revenue-generating event. It's usually associated with an account and one or more contacts, products, activities, and quotes.

These procedures are included in this section:

- *View Opportunity Details*
- *Change Opportunity Information*
- *Change Contact Information on an Opportunity*
- *Change Product Information on an Opportunity*
- *Change Quote Information on an Opportunity*
- *Convert an Opportunity to a Quote*
- *Change Activity Information on an Opportunity*
- *Change Opportunity Team Information*

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

Displaying Opportunity Details

Here's how to see opportunity details using the Opportunities list.

1. Tap Side Menu and then tap Opportunities to display the following:
    - The Opportunities list and details for the selected opportunity in the main pane.
    - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected opportunity, tap the following names in the list in the side pane:
    - **Contacts.** Shows the contact information for the opportunity. For more information, see *Change Contact Information on an Opportunity*.
    - **Products.** Shows the product information for the opportunity. For more information, see *Change Product Information on an Opportunity*.
    - **Quotes.** Shows the quote information for the opportunity. For more information, see *Change Quote Information on an Opportunity* and *Convert an Opportunity to a Quote*.

- **Activities.** Shows the activity information for the opportunity. For more information, see *Change Activity Information on an Opportunity*.
- **Opportunity Team.** Shows the opportunity team information for the opportunity. For more information, see *Change Opportunity Team Information*.

Modifying Opportunity Information

Here's how to modify opportunity information.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
3. Create a new opportunity as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new opportunity in the fields that appear, and then save the record.

Modifying Contact Information for an Opportunity

Here's how to modify the contact information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity contact as follows:
   a. Tap Contacts in the list in the side pane.

      All contacts associated with the opportunity appear in the Contacts list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
b. Choose the contact on the list that appears, and then tap OK.

> **Note:** In the case of child views where records are being associated, you can associate only a downloaded contact with a selected opportunity in offline mode.

5. Create a new opportunity contact as follows:
   a. Tap Contacts in the list in the side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new contact in the fields that appear, and then save the record.

> **Note:** Creating new records on this screen is supported only in online mode.

Modifying Product Information for an Opportunity

Here's how to modify the product information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity product as follows:
   a. Tap Products in the list in the side pane.

      All products associated with the opportunity appear in the Products list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new product in the fields that appear, and then save the record.

Modifying Quote Information for an Opportunity

Here's how to modify the quote information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.

3. Update an existing opportunity quote as follows:

    a. Tap Quotes in the list in the side pane.

    All quotes associated with the opportunity appear in the Quotes list in the main pane.

    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 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 side pane and then tap New (the plus (+) icon) in the main pane.
    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.

1. Tap Side Menu and then tap Opportunities to display the following:

    - The Opportunities list and details for the selected opportunity in the main pane.
    - A list in the side 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 after the list in the main pane.

3. Tap Quotes in the list in the side pane.
4. Tap Auto Quote to create a quote from the opportunity.

Field Mapping When Converting an Opportunity to a Quote (Offline Mode Only)

This tables show the field mapping used when converting an Opportunity to a Quote in offline mode.

Opportunity BC Fields	Quote BC Fields
Account Id	Account Id

Opportunity Product BC Fields	Quote Item BC Fields
Product	Product
Product Quantity	Extended Quantity Requested

Opportunity Product BC Fields	Quote Item BC Fields
Product Quantity	Quantity Requested

Price related fields (for example Net Price, Start Price, and Total) aren't available when a quote is created in disconnected mode. These fields are automatically populated when the records are synchronized with the server.

Modifying Activity Information for an Opportunity

Here's how to modify the activity information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity activity as follows:
   a. Tap Activities in the list in the side pane.

      All activities associated with the opportunity appear in the Activities list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
   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

Here's how to modify the opportunity team information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity team as follows:
   a. Tap Opportunity Team in the list in the side pane.

All team members associated with the opportunity appear in the Opportunity Team list in the main pane.

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.

Note: You can update the Primary check box only in online mode.

4. Add an existing person to the opportunity team as follows:
   a. Tap Opportunity Team in the list in the side pane and then tap New (the plus (+) icon) in the main pane.
   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.

These procedures are included in this section:

- *View Quote Details*
- *Change Quote Information*
- *Change Line Item Information on a Quote*
- *Change Order Information on a Quote*
- *Convert a Quote to an Order*
- *Change Quote Team Information*

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

Displaying Quote Details

Here's how to see quote details using the Quotes list.

1. Tap Side Menu and then tap Quotes to display the following:
   - The Quotes list and details for the selected quote in the main pane.
   - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected quote, tap the following names in the list in the side pane:
   - **Line Items.** Shows the quote item information for the quote. For more information, see *Change Line Item Information on a Quote*.

- **Orders.** Shows the order information for the quote. For more information, see *Change Order Information on a Quote* and *Convert a Quote to an Order*.
- **Quote Team.** Shows the quote team information for the quote. For more information, see *Change Quote Team Information*.

Modifying Quote Information

Here's how to change quote information.

1. Tap Side Menu and then tap Quotes to display the following:
   - The Quotes list and details for the selected quote in the main pane.
   - A list in the side 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 after the list in the main pane.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
3. Create a new quote as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   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

Here's how to change the line item information for a quote.

1. Tap Side Menu and then tap Quotes to display the following:
   - The Quotes list and details for the selected quote in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing quote line item as follows:
   a. Tap Line Items in the list in the side pane.

      All line items associated with the quote appear in the Line Items list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
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

Here's how to change the order information for a quote.

1. Tap Side Menu and then tap Quotes to display the following:
   - The Quotes list and details for the selected quote in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing quote order as follows:
   a. Tap Orders in the list in the side pane.

      All orders associated with the quote appear in the Orders list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
   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* .

1. Tap Side Menu and then tap Quotes to display the following:
   - The Quotes list and details for the selected quote in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Tap Orders in the list in the side pane.
4. Tap Auto Order to create an order from the quote.

Field Mapping When Converting a Quote to an Order (Offline Mode Only)

The following tables show the field mapping used when converting a Quote to an Order in offline mode.

Quote BC Fields	Order Entry - Orders BC Fields
Discount Amount	Discount Amount
Primary Organization Id	Primary Organization Id

Quote Item BC Fields	Order Entry - Line Items BC Fields
Product	Product
Quantity Requested	Quantity Requested
Discount Percent	Discount Percent
Base Price	Base Price
Adjusted List Price	Adjusted List Price
Net Price	Net Price

Pricing related fields (for example Net Price, Start Price, and Total) are not available when an order is created in disconnected mode. These fields are automatically populated when the records are synchronized with the server.

Modifying Quote Team Information for a Quote

Here's how to change the quote team information for a quote.

1. Tap Side Menu and then tap Quotes to display the following:
    - The Quotes list and details for the selected quote in the main pane.
    - A list in the side 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 after the list in the main pane.

3. Update an existing quote team as follows:
   a. Tap Quote Team in the list in the side pane.

      All team members associated with the quote appear in the Quote Team list in the main pane.
   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 checkbox. You must navigate away from the record to save your changes to it.

      Note: You can update the Primary checkbox only in online mode.
4. Add an existing person to the quote team as follows:
   a. Tap Quote Team in the list in the side pane and then tap New (the plus (+) icon) in the main pane.
   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 section:

- *View Order Details*
- *Modifying Order Information*
- *Modifying Line Item Information for an Order*

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

Displaying Order Details

Here's how to see order details using the Orders list.

1. Tap Side Menu and then tap Orders to display the following:
   - The Orders list and details for the selected order in the main pane.
   - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected order, tap the following name in the list in the side pane:
   - **Line Items.** Shows the line item information for the order. For more information, see *Modifying Line Item Information for an Order*.

Modifying Order Information

Complete the following procedure to modify order information.

To modify order information

1. Tap Side Menu and then tap Orders to display the following:
   - The Orders list and details for the selected order in the main pane.
   - A list in the side 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 after the list in the main pane.
   b. Tap the record field that you want to update, and update the field value.
      You must navigate away from the record to save your changes to it.
3. Create a new order as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   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 Side Menu and then tap Orders to display the following:
   - The Orders list and details for the selected order in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing order line item as follows:
   a. Tap Line Items in the list in the side pane.
      All line items associated with the order appear in the Line Items list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.

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.

These procedures are included in this section:

- *View Activity Details*
- *Change Activity Information*
- *Change Contact Information on an Activity*
- *Change Employee Information on an Activity*

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

Displaying Activity Details

Here's how to see activity details using the Activities list.

1. Tap Side Menu and then tap Activities to display the following:
    - The Activities list and details for the selected activity in the main pane.
    - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected activity, tap the following names in the list in the side pane:
    - **Contacts.** Shows the contact information for the activity. For more information, see *Change Contact Information on an Activity*.
    - **Employees.** Shows the employee information for the activity. For more information, see *Change Employee Information on an Activity*.

Modifying Activity Information

Here's how to change activity information.

1. Tap Side Menu and then tap Activities to display the following:
    - The Activities list and details for the selected activity in the main pane.
    - A list in the side 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 after the list in the main pane.
b. Tap the record field that you want to update, and update the field value.

   You must navigate away from the record to save your changes to it.

3. Create a new activity as follows:

   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new activity in the fields that appear, and then save the record.

Modifying Contact Information for an Activity

Here's how to change the contact information for an activity.

1. Tap Side Menu and then tap Activities to display the following:

   - The Activities list and details for the selected activity in the main pane.
   - A list in the side 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 after the list in the main pane.

3. Update an existing activity contact as follows:

   a. Tap Contacts in the list in the side pane.

      All contacts associated with the activity appear in the Contacts list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the contact on the list that appears, and then tap the OK.

   > **Note:** In the case of child views where records are being associated, you can associate only a downloaded contact with a selected activity in offline mode.

5. Create a new activity contact as follows:

   a. Tap Contacts in the list in the side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new contact in the fields that appear, and then save the record.

   > **Note:** Creating new records on this screen is supported only in online mode.

Modifying Employee Information for an Activity

Here's how to change the employee information for an activity.

1. Tap Side Menu and then tap Activities to display the following:
    - The Activities list and details for the selected activity in the main pane.
    - A list in the side 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 after the list in the main pane.
3. Update an existing activity employee as follows:
    a. Tap Employees in the list in the side pane.

        All employees associated with the activity appear in the Employees list in the main pane.
    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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
    b. Choose the employee on the list that appears, and then tap OK.

Unsupported Siebel Sales Features in Offline Mode

The features listed in this topic aren't supported in offline mode in the Siebel Mobile disconnected application for Siebel Sales. You must be connected to the internet and, in some cases, to the Siebel Server to do the following in your Siebel Mobile disconnected application for Siebel Sales:

- Update the Primary checkbox

    Primary checkbox functionality isn't supported in the Siebel Mobile application for Siebel Sales. For more information, see the following:
    - *Change Account Team Information for an Account*
    - *Change Contact Team Information for a Contact*
    - *Change Opportunity Team Information*
    - *Change Quote Team Information*

- Directly create new address records for accounts or contacts

  > **Note:** In the case of child views where records are being associated, you can associate only a downloaded address with a selected account in offline mode.

  In the case of child views where records are being associated, you can associate only a downloaded address with a selected account or contact in offline mode. For more information, see *Change Address Information for an Account* and *Change Address Information for a Contact*.

- Directly create new records using the double plus (++) icon

For more information about the general features that are not supported in offline mode, see *Unsupported Siebel Mobile Features in Offline Mode*.

8 Using the Siebel Mobile Application for Siebel Field Service

Overview of This Chapter

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Field Service can run.

It includes these topics:

- *Use the Home Page in Siebel Field Service*
- *Manage Activities in Siebel Field Service*
- *Manage Service Requests in Siebel Field Service*
- *Manage Accounts in Siebel Field Service*
- *Manage Parts in Siebel Field Service*
- *Manage Orders in Siebel Field Service*
- *Manage Invoices in Siebel Field Service*
- *Manage Assets in Siebel Field Service*
- *Manage Shifts in Siebel Field Service*
- *Tasks Flows for Siebel Field Service*
- *Unsupported Siebel Field Service Features in Offline Mode*

Note: The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing isn't configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see *Edit Items Inline*.

Using the Home Page for Siebel Field Service

The Siebel Mobile application for Siebel Field Service uses the Zante UI theme by default. If using an earlier version of the Siebel Mobile application for Siebel Field Service, prior to Siebel Innovation Pack 2015, then it is recommended that you reconfigure any enhancements made.

For more information about the Zante theme and navigating the UI using the Zante theme, see *About the Siebel Mobile Aurora and Zante UI Themes* and the remaining procedures in this topic.

These procedures are included in this section:

- *Navigate to the Home Page*
- *Review Activity Information*
- *Schedule Personal Appointments*

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

Navigating to the Home Page

Here's how to navigate to the home page of the Siebel Mobile application for Siebel Field Service (if not already displayed).

- Tap Side Menu and then tap Activities to display the home page.

  The home page consists of the calendar and the map view:

  - The Map in the main pane or work area shows the location of activities or appointments. The map view uses Oracle Spatial.
  - The Calendar in the side pane shows the scheduling information for activities or appointments. Different icons appear on the calendar (beside the activity name) indicating the status of the activity or appointment as described in the following table.

  For more information about using the calendar view and map view, see *Review Activity Information*.

Icon	Icon Description	Status
	A full page.	Scheduled (dispatched)
	An arrow that turns around a corner	Acknowledged
	A check mark	Done
	An exclamation mark	Declined

Reviewing Activity Information

On the home page, you can review the activity information.

1. Tap Side Menu and then tap Activities to display the home page.
2. On the map in the main pane, you can do the following:

   - Review Routes (the pin icons) to familiarize yourself with the locations of the activities.
   - Tap a Route (pin icon) to see summary information for the selected record, which includes the activity name and address location.

3. On the calendar in the side pane, you can do the following:
   - Use the navigation arrows to navigate across dates and view the activities scheduled on different dates.
   - Tap Today to see the activities scheduled for today's date.
   - Tap Daily, Weekly, or Monthly (or the corresponding calendar icons) to switch between the daily, weekly, or monthly view of activities scheduled.
   - Tap an activity icon on the calendar, and then tap Info to drill down on the detail information for the selected record. For more information, see *View Activity Details*. For more information about activity icons, see *Navigate to the Home Page*.

     > **Note:** The Map and Info buttons in the main pane persist for certain views in the Siebel Mobile application for Siebel Field Service. Tap Info to drill down on a selected activity. Tap Map to return to the home page (calendar and map views).

   - Tap an activity name on the calendar to drill down on the task-based screen flow for the selected record. For more information, see *View the Task-Based Screen Flow for an Activity*.
   - Schedule a personal appointment. For more information, see *Schedule Personal Appointments*.

Scheduling Personal Appointments

On the home page, you can schedule a personal appointment.

1. Tap Side Menu and then tap Activities to display the home page.
   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. On the calendar in the side pane, schedule a new personal appointment as follows:
   a. Tap New (the plus (+) icon).
   b. Enter the information for the new personal appointment on the Add Personal Appointment dialog that appears, and then tap Add.

Managing Activities for Siebel Field Service

An activity is a work order assigned to a Field Service representative by the dispatcher.

These procedures are included in this section:

- *View Activity Details*
- *Verify and Order Parts and Tools for an Activity*
- *View Substitute Information for a Part*
- *Accept an Activity*
- *View the Task-Based Screen Flow for an Activity*
- *Record Task Completion for an Activity*
- *Capture Asset Readings for an Activity*
- *Attach Media to an Activity*

- *Change Part Tracker Information for an Activity*
- *Remove a Serialized Part*
- *Install a Replacement Serialized Part*
- *Change Part Records for an Activity*
- *Change Time Data for an Activity*
- *Change Expense Data for an Activity*
- *Generate a Service Report for an Activity*
- *Create an Invoice from an Activity*
- *Print an Invoice for an Activity*
- *Capture a Signature for an Invoice*

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

Displaying Activity Details

Here's how to view activity details using the calendar on the home page.

1. On the home page, tap an activity icon on the calendar and then tap Info to drill down on the detail information for the selected activity.

   All details for the selected activity appear in the main pane in the Activity Details view from where you can perform the following tasks:

   - *Verify and Order Parts and Tools for an Activity*
   - *View Substitute Information for a Part*
   - *Accept an Activity*

   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap the Side Menu under Substitutes in the main pane, and then tap one of the following to view more information about the selected activity:

   - **Tasks.** Tap to view the tasks (if any) that must be completed for the activity.
   - **Service Request.** Tap to view the service request information for the activity.
   - **Asset Details.** Tap to view the asset information for the activity.
   - **Contact Information.** Tap to view the contact information for the activity.
   - **Account Information.** Tap to view the account information for the activity.
   - **Documentation.** Tap to view the documentation for the activity.
3. Tap Map in the main pane to return to the home page.

Verifying and Ordering Parts and Tools for an Activity

Before visiting a customer to service or complete an activity, you must verify that the required parts and tools are in your vehicle trunk and order any needed parts and tools. Here's how:

1. On the home page, tap an activity icon on the calendar and then tap Info to drill down on the detail information for the selected activity.

   All details for the activity appear in the main pane. For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap the down arrow next to Parts & Tools to expand and show the parts and tools associated with the activity.
3. Select a part or tool, and then tap Check Trunk to verify that the required part or tool is in your vehicle trunk.

   The number of part or tool available in your vehicle trunk appears.
4. Order a part or tool for the activity as follows:

   a. Select the part or tool that you want to order, and then tap Order Part.

      If an order doesn't already exist for the part or tool, then an order for the part or tools is created.
   b. Tap the link in the Order Number field to drill down on the selected record.

Viewing Substitute Information for a Part

Here's how to view the substitute information for a part.

1. On the home page, tap an activity icon on the calendar and then tap Info to drill down on the detail information for the selected activity.
2. All details for the activity appear in the main pane. For more information about the home page, see *Use the Home Page in Siebel Field Service*.
3. Tap the down arrow next to Parts & Tools to expand and show the parts and tools associated with the activity, and then select a part.
4. Tap Substitutes to expand and show the substitute availability information for the selected part.

Accepting an Activity

Here's how to accept (or decline) an activity to work upon.

1. On the home page, tap an activity icon on the calendar and then tap Info to drill down on the detail information for the selected activity.

   All details for the activity appear in the main pane. For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap Accept in the main pane to accept and start working on the activity.

Once accepted, the Job Status for the activity changes to Acknowledged and the activity icon on the calendar changes accordingly (to an arrow that turns around a corner).

If you can't take up this activity for any reason, then tap Decline to decline the activity. Once declined, the activity icon on the calendar changes to an exclamation mark and the Job Status for the activity changes to Declined.

Displaying the Task-Based Screen Flow for an Activity

Here's how to view the task-based screen flow for an activity by using the Calendar on the home page.

For more information about the home page, see *Use the Home Page in Siebel Field Service*.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.

   The Service Request information for the selected activity appears in the main pane. The Appointment information and task-based screen flow for the activity appears in the side pane. The task-based screen flow consists of the following options:

   - **Tasks to Complete.** See *Record Task Completion for an Activity*.
   - **Readings.** See *Capture Asset Readings for an Activity*.
   - **Photos/Videos.** See *Attach Media to an Activity*.
   - **Part Tracker.** See *Change Part Tracker Information for an Activity*.
   - **Time & Expense.** See *Change Time Data for an Activity* and *Change Expense Data for an Activity*.
   - **Finish.** See *Generate a Service Report for an Activity*, *Create an Invoice from an Activity*, *Print an Invoice for an Activity*, and *Capture a Signature for an Invoice*.

   You can customize the task-based screen flow for an activity by configuring second level navigation views in Siebel Tools for your Siebel application as required. For more information, see *Configure Second-Level Navigation Views*.
2. Tap the Side Menu under Service Request in the main pane, and then tap one of the following to view more information about the selected activity:

   - **Account Information.** Tap to view the account information for the activity.
   - **Contact Information.** Tap to view the contact information for the activity.
   - **Ordered Parts.** Tap to view the parts ordered for the activity.
   - **Asset Details.** Tap to view the asset information for the activity.
   - **Documentation.** Tap to view the documentation for the activity.
3. Tap the calendar icon next to the Appointment information in the side pane to return to the home page.

Recording Task Completion for an Activity

You record task completion to track your work progress on the activity. Here's how:

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.

   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap Tasks to Complete in the side pane.

   A list of the tasks associated with the activity appears in the main pane.
3. Record task completion for each activity task as follows:

   Note: Field service technicians need only complete the tasks that are relevant to the job in hand.

   a. Tap the empty switch next to a task to record the start time for the task.

      The switch starts to close or fill up indicating that the task is in progress.
   b. Tap the same switch next to same task again to record the end time for the task.

      The switch closes indicating that the task is complete.
   c. (Optional) Tap the closed switch next to a task to reopen the task.
   d. (Optional) Tap the empty switch next to the last task in the list to record to record completion of all the tasks at the same time.

      The switch next to each task closes, indicating that all tasks are complete.

Capturing Asset Readings for an Activity

For tasks such as taking a utility meter reading or measuring hydraulic pressure, you must record an asset reading. Here's how:

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.

   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap Readings in the side pane.

   The Asset Readings view appears in the main pane.
3. Capture a new asset reading as follows:

   a. Under Readings, use the navigation arrows to move through the list of different readings that can be captured.
   b. Tap an individual reading, and then tap New (the plus (+) icon) to capture a new reading.
   c. Enter the information for the new reading in the fields that appear.
   d. Navigate away from the record to save the record.

Attaching Media to an Activity

Here's how to attach media (photos or videos) to an activity.

Note: This feature is supported only in online mode.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.

   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap Photos/Videos in the side pane.

   The Photos/Videos view appears in the main pane.
3. Attach media to the selected activity as follows:

   a. Tap New File in the main pane.
   b. Do one of the following as required:

      - Take a photo or record a video.
      - Select an existing photo or video file from the existing photo library.

   The following file formats are supported: jpeg, png, MOV, and mp4.

Modifying Part Tracker Information for an Activity

You use part tracker to track part movements between locations. Here's how to change the part tracker information for an activity and to track and create activity part movements.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.

   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap Part Tracker in the side pane.

   The Part Tracker view appears in the main pane showing the tracked parts associated with the activity.
3. Update an existing activity part movement (part tracker record) as follows:

   a. Tap the part tracker record that you want to update.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.

4. Create a new activity part movement (part tracker record) as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new part movement in the fields that appear. The following table describes the fields.

Field Name	Description
Product	Select the product that's associated with the part.
Quantity	Type the quantity of the part.
From	Select the location from where you want to move the part.
To	Select the location to where you want to move the part.
Status	Select a status for the part.
Asset #	Select an asset number to associate with the part.
Part Number	The part number associated with the product.
Comments	Type any necessary comment about the activity part movement.
Billable	Select this checkbox to indicate if the part movement is billable. Otherwise deselect this checkbox.

    c. Navigate away from the record to save the record.
5. Tap Menu (the cogwheel icon) in the main pane, and then tap Commit to generate the inventory transactions.

> **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.

Removing a Serialized Part

Here's how to remove a defective serialized part from service. After you complete this procedure, you install a replacement serialized part.

For more information, see *Install a Replacement Serialized Part*.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.

   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap Part Tracker in the side pane.

   The Part Tracker view appears in the main pane showing the tracked parts associated with the activity.
3. Remove the serialized part as follows:

   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the part movement in the fields that appear. The following table describes the fields.

Field Name	Description
Product	Select the product that's associated with the part.
Quantity	Type the quantity of the part.
From	Select a value of Customer.
To	Select a value of Trunk.
Status	Select a value of Defective.
Asset #	Select an asset number to associate with the part.
Billable	Select this checkbox to indicate if the part movement is billable. Otherwise deselect this checkbox.

   c. Navigate away from the record to save the record.
4. Tap Menu (the cogwheel icon) in the main pane, and then tap Commit.

   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.
5. Tap Menu (the cogwheel icon) in the main pane, and then tap RMA to create a return merchandise authorization for the part movement.

Installing a Replacement Serialized Part

Here's how to install a replacement serialized part. Before you complete this procedure, you remove the defective serialized part from service.

For more information, see *Remove a Serialized Part*.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.

   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap Part Tracker in the side pane.

   The Part Tracker view appears in the main pane showing the tracked parts associated with the activity.
3. Install a replacement serialized part as follows:

   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the part movement in the fields that appear. The following table describes the fields.

Field Name	Description
Product	Select the product that's 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 checkbox to indicate if the part movement is billable. Otherwise deselect this checkbox.

   c. Navigate away from the record to save the record.
4. Tap Menu (the cogwheel icon) in the main pane, and then tap Commit.

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.

Modifying Part Tracker for an Activity by Scanning Barcode Data

Here's how to update existing part information for an activity by scanning the part's barcode data. You also can use this method to add new part tracker records. You use a barcode reader to scan 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* .

1. On the home page, tap an activity name on the calendar to drill down to the task-based screen flow for the selected activity.
2. Tap Part Tracker in the side pane.

   The Part Tracker view appears in the main pane, showing the tracked parts associated with the activity.
3. Update an existing part tracker record by scanning the barcode data:

   a. Tap the part tracker record that you want to update, and then tap the Barcode Update icon.
   b. 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).
   c. Scan the barcode.

      The appropriate field (Asset #) in the selected part tracker 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\`.

      > **Note:** By scanning barcode data, you can update assets belonging to the same product only.

4. Add a new part tracker record by scanning the part's barcode data:

   a. Tap the Barcode New icon.
   b. 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).
   c. 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\`.

      > **Note:** By scanning barcode data, you can only update assets belonging to the same product.

   d. Enter other appropriate field values in the new record.

Modifying Time Tracker Information for an Activity

Time tracker includes information about the time spent working on an activity (for example, travel and labor time). You can include this time in a customer invoice. Here's how to change the time tracker information for an activity.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.

   For more information about the home page, see *Use the Home Page in Siebel Field Service*.
2. Tap Time & Expense Tracker in the side pane.

   The Time & Expense Tracker view appears in the main pane. It shows the time spent working on the activity in Time Tracker, the expenses incurred while working on the activity in Expense Tracker, and the photos associated with the activity in Attachments.
3. Start a new time tracker record as follows:

   a. Next to Time Tracker, tap Start (the plus (+) icon) in the main pane.
   b. Enter the information for the new record in the fields that appear.

      The following table describes the fields. You must navigate away from the record to save your record.

Field Name	Description
Type	Select the type of time (for example: Work, Travel, Service. Consulting).
Date	Select the date of the time.
Start Time	The start time for the activity, which defaults to the current time but you can change this as required.
End Time	Type the end time for the activity. You can leave this field blank, and tap End in the main pane to record the current time in the End Time field. **Note:** The End button is supported only in online mode.
Billable	Select this checkbox to indicate if the time is billable. Otherwise deselect it

4. To update an existing time tracker record, tap the record field that you want to update, and then update the field value.

   You must navigate away from the record to save your changes to it.

Modifying 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. Here's how to change the expense tracker information for an activity.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.
2. Tap Time & Expense Tracker in the side pane.

   The Time & Expense Tracker view appears in the main pane. It shows the time spent working on the activity in Time Tracker, the expenses incurred while working on the activity in Expense Tracker, and the photos associated with the activity in Attachments.
3. Create a new expense tracker record as follows:

   a. Next to Expense Tracker, tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new expense incurred in the fields that appear.

      The following table describes the fields. You must navigate away from the record to save the record.

Field Name	Description
Type	Select the type of expense (for example: Car Rental, Dinner, Conference).
Amount	Type the amount to expense.
Date	The date the expense was incurred.
Comments	Type any necessary comment about the expense.
Rate	Select a rate for the expense (for example: Expense or Material).
Billable	Select this checkbox to indicate if the expense is billable. Otherwise deselect it.

4. To update an existing expense tracker record, tap the record field that you want to update, and then update the field value.

   You must navigate away from the record to save your changes to it.

Generating Service Reports

Here's how to generate a service report for an activity.

Note: This task is supported only in online mode.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.
2. Tap Finish in the side pane.

   The Invoices view appears in the main pane.
3. Tap Report in the main pane to generate a service report for the activity.

   The service report appears in the main pane. The service report summarizes all the task information, readings, part tracker, time tracker, and expense tracker information for the activity.

   The field service representative shows the service report to the customer.
4. When the customer has reviewed the service report, tap OK to return to the Invoices view.

Creating Invoices from Activities in Siebel Field Service

When you create an invoice from an activity, an invoice record is automatically created for the activity using the data from the activity. Here's how to create the invoice:

Note: This task is supported only in online mode.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.
2. Tap Finish in the side pane.

   The Invoices view appears in the main pane.
3. Tap Create Invoice in the main pane to create an invoice from the activity.

   A new invoice is appended to the invoice list in the main pane.

   Note: To create an invoice from an activity, note that the Billable checkbox must be selected on the activity.
4. Tap to preview the invoice details.

   For more information, see *Print an Invoice for an Activity*.
5. Tap Sign to obtain a signature for the invoice.

   For more information, see *Capture a Signature for an Invoice*.

Printing Invoices Associated with Activities

Here's how to print an invoice associated with an activity.

Note: The print invoice capability in the Siebel Mobile application for Field Service is built using third-party, open source, embedded *JavaScript* and uses MIT licensing. For more information, see *Print Capability Uses MIT License*.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.
2. Tap Finish in the side pane.

   The Invoices view appears in the main pane.
3. Tap the invoice that you want to print.
4. Tap Print to preview the invoice details.

   Use the mobile device features to print or email the invoice as required.

Capturing Signatures for Invoice in Siebel Field Service

After you create an invoice, you capture the (contact) signature for the invoice. You capture this signature to verify that the contact reviewed the invoice. Here's how:

Note: Signature display is supported only in online mode.

1. On the home page, tap an activity name on the calendar to drill down on the task-based screen flow for the selected activity.
2. Tap Finish in the side pane.

   The Invoices view appears in the main pane.
3. Tap the invoice for which you want to capture the electronic signature.
4. Capture a signature for the invoice as follows:
   a. Tap Sign.

      Information about the invoice appears in the main pane. A Signature applet appears after the invoice information.
   b. In the Contact field, select the name of the contact who signs for the invoice.
   c. Capture the signature of the contact in the signature input box.
   d. If you make a mistake when capturing the signature, tap Clear to clear the signature and start again.
   e. Tap Save when finished.
   f. Complete the Customer Satisfaction Survey when prompted, and then tap Finish.

      Note: The Customer Satisfaction Survey is supported only in online mode.

Managing Service Requests for Siebel Field 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.

These procedures are included in this section:

- *View Service Request Information*

- *Change Activity Information for a Service Request*
- *Change Order Information for a Service Request*
- *View Invoice Information for a Service Request*
- *Print Invoices Associated with a Service Request*

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

Displaying Service Request Information

Here's how to view service request information.

1. Tap Side Menu and then tap Service Request to view:
    - The Service Requests list in the main pane.
    - The Calendar showing the activity planning information in the side pane.
2. Update an existing service request:
    a. Tap a service request in the Service Requests list.
    b. Tap the record field that you want to update, and update the field value.

    You must navigate away from the record to save your changes to it.

    Note: You can't change service requests that are closed.
3. Create a new service request as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new service request in the fields that appear.

    You must navigate away from the record to save the record.
4. In the Service Requests list, tap the link in the SR# field to drill down on the selected record.

    All details for the selected service request appear in the main pane, from where you can do the following:
    - *Change Activity Information for a Service Request*
    - *Change Order Information for a Service Request*
    - *View Invoice Information for a Service Request*
    - *Print Invoices Associated with a Service Request*

Modifying Activity Information for a Service Request

You can add a specific activity to a service request that's 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 isn't associated with an account.

Here's how to change the activity information for a service request.

1. Tap Side Menu and then tap Service Request to view:
    - The Service Requests list in the main pane.
    - The Calendar showing the activity planning information in the side pane.
2. In the Service Requests list, tap the link in the SR# field to drill down on the selected record.

   All details for the selected service request appear in the main pane.
3. Update an existing service request activity:
    a. Tap the down arrow next to Activities to expand and show the activities associated with the service request.
    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 must navigate away from the record to save your changes to it.
4. Create a new service request activity:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new activity in the fields that appear.

       You must navigate away from the record to save the record.

Modifying Order Information for a Service Request

Here's how to change the order information for a service request.

1. Tap Side Menu and then tap Service Request to display the following:
    - The Service Requests list in the main pane.
    - The Calendar showing the activity planning information in the side pane.
2. In the Service Requests list, tap the link in the SR# field to drill down on the selected record.

   All details for the selected service request appear in the main pane.
3. Update an existing service request order as follows:
    a. Tap the down arrow next to Orders to expand and show the orders associated with the service request.
    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 must navigate away from the record to save your changes to it.
4. Create a new service request order as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new order in the fields that appear.

       You must navigate away from the record to save the record.

Viewing Invoice Information for Service Requests

Here's how to view the invoice information for a service request.

1. Tap Side Menu and then tap Service Request to view:
   - The Service Requests list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Service Requests list, tap the link in the SR# field to drill down on the selected record.
   All details for the selected service request appear in the main pane.
3. Tap the down arrow next to Invoices to expand and show the invoices associated with the service request.
4. Tap the link in the Invoice # field to drill down on the selected record and view the details of the invoice.

Printing Invoices Associated with Service Requests

Here's how to print an invoice associated with a service request.

Note: The print invoice capability in the Siebel Mobile application for Field Service is built using third-party, open source, embedded *JavaScript* and uses MIT licensing. For more information, see *Print Capability Uses MIT License*.

1. Tap Side Menu and then tap Service Request to view:
   - The Service Requests list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Service Requests list, tap the link in the SR# field to drill down on the selected record.
   All details for the selected service request appear in the main pane.
3. Tap the down arrow next to Invoices to expand and show the invoices associated with the service request.
4. Tap the link in the Invoice # field to drill down on the selected record and review the details of the invoice.
5. Tap Print to preview the invoice details.
   Use the mobile device features to print or email the invoice as required.

Managing Accounts for Siebel Field 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.

These procedures are included in this section:

- *View Account Details*

- *View Contact Information for an Account*
- *Change Service Request Information for an Account*
- *View Asset Information for an Account*
- *View Entitlement Information for an Account*

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

Displaying Account Details

Here's how to see account details using the Accounts list.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Accounts list, tap the link in the Account field to drill down on the selected record.
   All details for the selected account appear in the main pane, from where you can do the following:
   - *View Contact Information for an Account*
   - *Change Service Request Information for an Account*
   - *View Asset Information for an Account*
   - *View Entitlement Information for an Account*

Viewing Contact Information for an Account

Here's how to view the contact information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Accounts list, tap the link in the Account field to drill down on the selected record.
   All details for the selected account appear in the main pane.
3. In Contacts, scroll through the Contacts associated with the account.

Modifying Service Request Information for an Account

Here's how to modify the service request information for an account.

1. Tap Side Menu and then tap Accounts to view:

- The Accounts list in the main pane.
- The Calendar showing the activity planning information in the side pane.

2. In the Accounts list, tap the link in the Account field to drill down on the selected record.

   All details for the selected account appear in the main pane.
3. Update an existing account service request as follows:
   a. Tap the down arrow next to Service Requests to expand and show the service requests associated with the account.
   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 must navigate away from the record to save your changes to it.
4. Create a new account service request as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new service request in the fields that appear.

      You must navigate away from the record to save the record.

Viewing Asset Information for an Account

Here's how to view the asset information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Accounts list, tap the link in the Account field to drill down on the selected record.

   All details for the selected account appear in the main pane.
3. Tap the down arrow next to Assets to expand and show the assets associated with the account.
4. Tap the link in the Asset# field to drill down on the selected record and view the details of the asset.

Viewing Entitlement Information for an Account

Here's how to view the entitlement information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Accounts list, tap the link in the Account field to drill down on the selected record.

   All details for the selected account appear in the main pane.
3. Tap the down arrow next to Entitlements to expand and show the entitlements associated with the account.

Managing Parts for Siebel Field Service

A part is an item that you sell to the customer.

These procedures are included in this section:

- *View Part Details*
- *View Availability Information for a Part*

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

Displaying Part Details

Here's how to see part details using the Inventory Level list.

- Tap Side Menu and then tap Inventory to display the following:
  - The Inventory Level list in the main pane.
  - The Calendar showing the activity planning information in the side pane.

Viewing the Good and Defective Availability Information for a Part

Here's how to view Good and Defective availability information for a part.

1. Tap Side Menu and then tap Inventory to view:
   - The Inventory Level list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. To view the inventory level availability for good parts, select Good from the drop-down list in Inventory Level.
3. To view the inventory level availability for defective parts, select Defective from the drop-down list menu in Inventory Level.

Managing Orders for Siebel Field 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.

These procedures are included in this section:

- *View Order Details*
- *Change Order Information*
- *Change Line Item Information for an Order*

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

Displaying Order Details

Here's how to see order details using the Orders list.

1. Tap Side Menu and then tap Orders to display the following:
    - The Orders list in the main pane.
    - The Calendar showing the activity planning information in the side pane.
2. In the Orders list, tap the link in the Order # field to drill down on the selected record.

    All details for the selected order appear in the main pane, from where you can do the following:
    - *Change Order Information*
    - *Change Line Item Information for an Order*

Modifying Order Information

Here's how to change order information

1. Tap Side Menu and then tap Orders to view:
    - The Orders list in the main pane.
    - The Calendar showing the activity planning information in the side pane.

2. Update an existing order as follows:
   a. In the Orders list, tap the link in the Order # field to drill down on the selected record.

      All details for the selected order appear in the main pane.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
   c. To add more line items to the order, see *Change Line Item Information for an Order*.

   You can't 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 *Verify and Order Parts and Tools for an Activity*.
   - Activities, then Part Tracker (and using the RMA link). For more information, see *Remove a Serialized Part*.

Modifying Line Item Information for an Order

Here's how to change the line item information for an order.

1. Tap Side Menu and then tap Orders to view:
   - The Order s list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Orders list, tap the link in the Order # field to drill down on the selected record.

   All details for the selected order appear in the main pane.
3. Update an existing order line item as follows:
   a. Tap the line item that you want to update.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
4. Create a new order line item as follows:
   a. Tap New (the plus (+) icon).
   b. Enter the information for the new line item in the fields that appear.

      You must navigate away from the record to save the changes to it.

Managing Invoices for Siebel Field Service

An invoice is a bill to the customer for parts, labor, and other expenses that you incur.

These procedures are included in this section:

- *View Invoice Details*
- *View Line Items on an Invoice*
- *Print an Invoice*

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

Displaying Invoice Details

Here's how to see invoice details using the Invoices list.

1. Tap Side Menu and then tap Invoices to see:
   - The Invoices list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Invoices list, tap the link in the Invoice # field to drill down on the selected record.
   All details for the selected invoice appear in the main pane, from where you can do the following:
   - *View Line Items on an Invoice*
   - *Print an Invoice*

Viewing Line Item Information for an Invoice

Here's how to view the line item information for an invoice.

1. Tap Side Menu and then tap Invoices to see:
   - The Invoices list in the main pane
   - The Calendar showing the activity planning information in the side pane.
2. In the Invoices list, tap the link in the Invoice # field to drill down on the selected record.
   All details for the selected invoice appear in the main pane.

Printing Invoices

Here's how to print an invoice.

Note: The print invoice capability in the Siebel Mobile application for Field Service is built using third-party, open source, embedded *JavaScript* and uses MIT licensing. For more information, see *Print Capability Uses MIT License*.

1. Tap Side Menu and then tap Invoices to see:

- The Invoices list in the main pane.
- The Calendar showing the activity planning information in the side pane.

2. In the Invoices list, tap the link in the Invoice # field to drill down on the selected record.

   All details for the selected invoice appear in the main pane.
3. Tap Print to preview the invoice details.

   Use the mobile device features to print or email the invoice as required.

Managing Assets for Siebel Field Service

An asset is property or an item of value that your company owns.

These procedures are included in this section:

- *View Asset Details*
- *View Measurement Data for an Asset*
- *Capture a Reading for an Asset*
- *View Warranty Information for an Asset*
- *View Service Request Information for an Asset*

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

Displaying Asset Details

Here's how to see asset details using the Assets list.

1. Tap Side Menu and then tap Assets to see:
   - The Assets list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Assets list, tap the link in the Asset # field to drill down on the selected record.

   All details for the selected asset appear in the main pane, from where you can do the following:
   - *View Measurement Data for an Asset*
   - *Capture a Reading for an Asset*
   - *View Warranty Information for an Asset*
   - *View Service Request Information for an Asset*

Viewing Measurement Information for an Asset

Here's how to view the measurement information for an asset. You might view measurement information to record readings for utility meters or to measure hydraulic pressure.

1. Tap Side Menu and then tap Assets to see:
    - The Assets list in the main pane.
    - The Calendar showing the activity planning information in the side pane.
2. In the Assets list, tap the link in the Asset # field to drill down on the selected record.

    All details for the selected asset appear in the main pane.
3. In Readings, use the navigation arrows to move through the list of different readings that can be captured. For example: Pump Pressure, Odometer, and Oil Pressure.

Capturing a Reading for an Asset

For tasks like taking a utility meter reading or measuring hydraulic pressure, you must record an asset reading. Here's how:

1. Tap Side Menu and then tap Assets to see:
    - The Assets list in the main pane.
    - The Calendar showing the activity planning information in the side pane.
2. In the Assets list, tap the link in the Asset # field to drill down on the selected record.

    All details for the selected asset appear in the main pane.
3. Capture a new asset reading as follows:
    a. In Readings, use the navigation arrows to move through the list of different readings that can be captured.
    b. Tap an individual reading, and then tap New (the plus (+) icon) 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

Here's how to view the warranty information for an asset.

1. Tap Side Menu and then tap Assets to see:
    - The Assets list in the main pane.
    - The Calendar showing the activity planning information in the side pane.

2. In the Assets list, tap the link in the Asset # field to drill down on the selected record.
   All details for the selected asset appear in the main pane.
3. Tap the down arrow next to Warranty to expand and show the warranties associated with the asset.
4. Tap the warranty that you want to view.

Viewing Service Request Information for an Asset

Here's how to view the service request information for an asset.

1. Tap Side Menu and then tap Assets to see:
   - The Assets list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. In the Assets list, tap the link in the Asset # field to drill down on the selected record.
   All details for the selected asset appear in the main pane.
3. Tap the down arrow next to Service Requests to expand and show the service requests associated with the asset.
   Tap the link in the SR # field to drill down on the selected record.

Managing Shifts for Siebel Field Service

A shift is an established time interval in which employees perform work.

These procedures are included in this section:

- *View Shift Details*
- *Start and End a Shift*
- *Start and End a Break*
- *Start or End a Period of Unavailability*

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

Displaying Shift Details

You can update shift information, including breaks and periods of unavailability (POUs), only if you use Siebel Real-time Scheduler Version 21 or later as your scheduling engine and Siebel Field Service Integration to Oracle Real-time Scheduler Version 21 or later integration pack for the integration. Here's how to view shift details using the Shifts list.

Note: Updating shift information, including breaks and POUs, is supported only in online mode.

1. Tap Side Menu and then tap Shifts to see:

- The Shift list in the main pane from where you can do the following:
  - View and update the shift information, see *Start and End a Shift*.
  - View and update the break information for the shift, see *Start and End a Break*.
  - View and update the period of unavailability (POU) information for the shift, see *Start or End a Period of Unavailability*.
- The Calendar showing the activity planning information in the side pane.

Starting and Ending a Shift

Here's how to start and end a shift.

1. Tap Side Menu and then tap Shifts to see:
   - The Shift list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. Tap a shift record in the main pane.
3. Tap Start when you start the shift to record your start time and date.
4. Tap Complete when you end the shift to record your end time.

Starting and Ending a Break

Here's how to start and end a break.

1. Tap Side Menu and then tap Shifts to see:
   - The Shift list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. Tap a break record in the main pane.
3. Tap Start when you start the break to record your start time and start date.
4. Tap Complete when you end the break to record your end time.

Starting or Ending a Period of Unavailability

Here's how to start or end a period of unavailability (POU) for a shift.

1. Tap Side Menu and then tap Shifts to display the following:
   - The Shift list in the main pane.
   - The Calendar showing the activity planning information in the side pane.
2. Tap a POU record in the main pane.
3. Tap Start when you start the POU to record the start time and date.

4. Tap Complete when you end the POU to record your end time.

Tasks Flows for Siebel Field Service

Siebel Field Service representatives travel from one customer location to another performing jobs like installation and repairs. This topic summarizes the typical Siebel Field Service task flows that field service representatives or technicians carry out on a daily basis and lists the topics that you should review for further information.

Siebel Field Service task flows are divided into the following areas:

- *Start the Day*.
- *Prepare for Customer Visits*
- *Work on a Job*
- *Finish a Job*

Starting the Day

Siebel Field Service representatives typically perform these tasks at the start of each day to plan their daily activities:

- Review the daily activities and schedule. For more information, see *Review Activity Information*.
- View the route for the day (that is, view the locations for the activities on the map). For more information, see *Review Activity Information*.
- View the notifications list. For more information, see *Review Notification Messages in Siebel Mobile* and *Display Location Details in Siebel Mobile*.

Preparing for Customer Visits

Siebel Field Service representatives prepare for meetings and customer visits by reviewing all the information associated with the activity. Typical tasks they perform for each activity include:

- Review the activity information. For more information, see *Review Activity Information*.
- Review the tasks or instructions for the activity and other information (such as service requests, asset details, contact information, account information, and documentation) associated with the activity. For more information, see *View Activity Details*.
- Review the inventory in the trunk. If parts aren't available in the trunk, then order them. For more information, see *Verify and Order Parts and Tools for an Activity*.
- Confirm the availability of substitute parts. For more information, see *View Substitute Information for a Part*.
- If you've the skills to complete an activity, then accept the activity to work on it otherwise decline the activity. For more information, see *Accept an Activity*.
- Review the tasks needed to complete the activity. For more information, see *Record Task Completion for an Activity*.

Working on a Job

Siebel Field Service representatives start working on a job when they reach the customer site. Typical tasks that they perform include:

- Complete each activity task as required and record completion of each task. For more information, see *Record Task Completion for an Activity*.
- Record and update readings as required. For more information, see *Capture Asset Readings for an Activity*.
- Attach media to the service request as required. For example, take a picture or video of the damaged part and attach it to the service request. For more information, see *Attach Media to an Activity*.
- Track the movement of parts and nonserialized parts. For more information, see *Change Part Tracker Information for an Activity*.
- Remove serialized parts. For more information, see *Remove a Serialized Part*.
- Install replacement serialized parts. For more information, see *Install a Replacement Serialized Part*.
- Record the time that you spent working to complete the activity. For more information, see *Change Time Data for an Activity*.
- Record any expenses that you incurred while working to complete the activity. For more information, see *Change Expense Data for an Activity*.

Finishing a Job

Siebel Field Service representatives finish work on a job by completing these tasks:

- Verify that all tasks for the activity are complete. For more information, see *Record Task Completion for an Activity*.
- Generate a service report for the activity and show it to the customer. For more information, see *Generate a Service Report for an Activity*.
- Create an invoice for the activity. For more information, see *Create an Invoice from an Activity*.
- Capture the (contact) signature for the invoice. For more information, see *Capture a Signature for an Invoice*.
- Record customer feedback to the service provided. For more information, see *Capture a Signature for an Invoice*.
- Record the end time for the activity after you finish work on the job. For more information, see *Change Time Data for an Activity*.

Unsupported Siebel Field Service Features in Offline Mode

The features listed in this section aren't supported in offline mode in the Siebel Mobile disconnected application for Siebel Field Service. You must be connected to the internet and, in some cases, to the Siebel Server to do the following in your Siebel Mobile disconnected application for Siebel Field Service:

- Attach media (photo or video) to an activity. For more information, see *Attach Media to an Activity*.
- Use the End button for time tracker. For more information, see *Change Time Data for an Activity*.
- Generate service reports. For more information, see *Generate a Service Report for an Activity*.
- Create invoices from activities. For more information, see *Create an Invoice from an Activity*.
- Capture electronic signatures. For more information, see *Capture a Signature for an Invoice*.
- Complete the customer satisfaction survey. For more information, see *Capture a Signature for an Invoice*.
- Update shift information, including breaks and periods of unavailability (POUs). For more information, see *View Shift Details*.

9 Using Siebel Mobile Application for Siebel Financial Services

Using the Siebel Mobile Application for Siebel Financial Services

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

- *Use the Home Page for Siebel Financial Services*
- *Manage Accounts in Siebel Financial Services*
- *Manage Contacts in Siebel Financial Services*
- *Manage Financial Applications in Siebel Financial Services*
- *Manage Opportunities in Siebel Financial Services*
- *Manage Households in Siebel Financial Services*
- *Manage Financial Accounts in Siebel Financial Services*
- *Manage Activities in Siebel Financial Services*
- *Manage Leads in Siebel Financial Services*

Note: The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing isn't configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see *Edit Items Inline*.

Using the Home Page for Siebel Financial Services

These procedures are included in this section:

- *Schedule and View Activities on the Home Page*
- *Access New Records from the Home Page*
- *Review Charts on the Home Page*
- *Review Opportunities from the Home Page*

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

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 the Siebel Fundamentals Guide.

Accessing New Records From the Home Page

From the home page, you can quickly access these 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.

1. Tap Side Menu 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 the *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 these 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 Side Menu 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.

1. Tap Side Menu 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 (next to its tile).
3. To return to the home page, repeat the first step in this procedure.

Managing Accounts for Siebel Financial Services

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.

These procedures are included in this section:

- *View Account Details*
- *Perform a Needs Analysis for an Account*
- *Change Account Information*
- *Change Contact Information on an Account*
- *Change Opportunity Information on an Account*
- *Change Address Information on an Account*
- *Change Activity Information on an Account*
- *Change Account Team Information on an Account*
- *View Financial Account Information on an Account*
- *View Product Recommendations for an Account*
- *Manage Application Information for an Account*

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

Displaying Account Details

Here's how to view account details using the Accounts list.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.

- A list in the side 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 side pane:

   - **Contacts.** Shows the contact information for the account. For more information, see *Change Contact Information on an Account*.
   - **Opportunities.** Shows the opportunity information for the account. For more information, see *Change Opportunity Information on an Account*.
   - **Addresses.** Shows the address information for the account. For more information, see *Change Address Information on an Account*.
   - **Activities.** Shows the activity information for the account. For more information, see *Change Activity Information on an Account*.
   - **Account Team.** Shows the account team information for the account. For more information, see *Change Account Team Information on an Account*.
   - **Financial Accounts.** Shows the financial account information for the account. For more information, see *View Financial Account Information on an Account*.
   - **Recommendations.** Shows the product recommendations for the account as recorded by an Intelligent Advisor needs analysis. For more information, see the following topics:

     - *Perform a Needs Analysis for an Account*
     - *View Product Recommendations for an Account*

   - **Applications.** Shows the application information for products for the account. For more information, see *Manage Application Information for an Account*.
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 Financial Services.
    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 side 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 side 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 side 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 side pane to return to the Account 360 View.
    d. In the Needs Analysis applet, conduct an Intelligent Advisor 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 *Perform a Needs Analysis for an Account*.
       - Review product recommendations for the account as shown in *View Product Recommendations for an Account*.
       - Start the application capture process for a product and then save or submit the application as shown in *Apply for Products on an Account*.
       - Track applications for products, resume existing applications, and sign completed applications as shown in *Manage Application Information for an Account*.

Performing Needs Analysis for Accounts

You perform a needs analysis for an account to record information about the account. However, you don't automatically create a financial application when you perform a needs analysis.

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details for the selected account in the main pane.
    - A list in the side 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 Intelligent Advisor for the particular needs analysis selected in the previous step.

       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 Intelligent Advisor Policy Model set up for your implementation of the selected type of needs analysis.

> **Note:** For information about integrating Intelligent Advisor for Siebel business applications, which includes creating and deploying policy model definitions in Intelligent Advisor, see *Siebel Self Service Administration Guide* . For information about the Intelligent Advisor-specific workflows for Siebel Financial Services, see *Overview of This Chapter*. The sample policy model that is shipped with Intelligent Advisor illustrates the capabilities of the integration between Intelligent Advisor and Siebel Mobile.

After completing the needs analysis interview, the Recommendations screen appears. For more information, see *View Product Recommendations for an Account* and *Apply for Products on an Account*.

Modifying Account Information

Here's how to change account information.

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details for the selected account in the main pane.
    - A list in the side 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 must navigate away from the record to save your changes to it.
3. Create a new account as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new account on the form that appears, and then save the record.

Modifying Contact Information for an Account

Here's how to change the contact information on an account.

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details for the selected account in the main pane.
    - A list in the side 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 side pane.

       All contacts associated with the account appear in the Contacts list in the main pane.
    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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
    b. Select 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 side pane and then tap New (the double plus (++) icon) in the main pane.
    b. Enter the information for the new contact on the form that appears, and then save the record.

Modifying Opportunity Information for an Account

Here's how to change opportunity information on an account.

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details for the selected account in the main pane.
    - A list in the side 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 side pane.

       All opportunities associated with the account appear in the Opportunities list in the main pane.
    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 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 side pane and then tap New (the double plus (++) icon) in the main pane.
b. Enter the information for the new opportunity on the form that appears, and then save the record.

Modifying Address Information for an Account

Here's how to change the address information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 side pane.

      All addresses associated with the account appear in the Addresses list in the main pane.
   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 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 side pane, and then tap Add (the plus (+) icon) in the main pane.
   b. Select 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 side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new address on the form that appears, and then save the record.

Modifying Activity Information for an Account

Here's how to change the activity information for an account.

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 side pane.

      All activities associated with the account appear in the Activities list in the main pane.
   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 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 side pane, and then tap New (the plus (+) icon) in the main pane.
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

Here's how to change the account team information for an account.

1. Tap Side Menu and then tap Accounts to display the following:

- The Accounts list and details for the selected account in the main pane.
- A list in the side 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 side pane.

All account teams associated with the account appear in the Account Team list in the main pane.

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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
b. Select the person on the list that appears, and then tap OK.

Viewing Financial Account Information for an Account

Here's how to view the financial account information on an account. You can't change financial account information for an account.

1. Tap Side Menu and then tap Accounts to display the following:

- The Accounts list and details for the selected account in the main pane.
- A list in the side 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 side pane.

All financial accounts associated with the account appear in the Financial Accounts list in the main pane.

4. Tap the financial account that you want to view.

Viewing Recommendation Information for an Account

Here's how 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 *Apply for Products on an Account*.

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details for the selected account in the main pane.
    - A list in the side 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 side pane.

    All (product) recommendations associated with the account appear in the Recommendations list in the main pane.

    The product recommendations shown in this view come from the needs analysis that you started in *Perform a Needs Analysis for an Account*.

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.

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details for the selected account in the main pane.
    - A list in the side 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 side pane.

    All product recommendations associated with the account appear in the Recommendations list in the main pane.

    The product recommendations shown come from the needs analysis that you started in *Perform a Needs Analysis for an Account*.

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.
5. In the Products applet, select a product and then tap Apply.

   Doing this initiates the application capture process from Intelligent Advisor for the product. The composition and structure of the application capture process varies according to the Intelligent Advisor Policy Model set up for your implementation of the application capture process for the selected product.

   > **Note:** For information about integrating Intelligent Advisor for Siebel business applications, which includes creating and deploying policy model definitions in Intelligent Advisor, see *Siebel Self Service Administration Guide* . For information about the Intelligent Advisor-specific workflows for Siebel Financial Services, start with *Workflows for Intelligent Advisor Interview Sessions*. The sample policy model that is shipped with Intelligent Advisor illustrates the capabilities of the integration between Intelligent Advisor and Siebel Mobile.

   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 *Manage Application Information for an Account*.
   - **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 *Manage Application Information for an Account*.
   - **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 haven't been submitted, and signing any submitted applications.

1. Tap Side Menu and then tap Accounts to display the following:

   - The Accounts list and details for the selected account in the main pane.
   - A list in the side 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 side pane.

   All application information associated with the account appears in the Applications list in the main pane.
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 Financial Services

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.

These procedures are included in this section:

- *View Contact Details*
- *Perform a Needs Analysis for a Contact*
- *Change Contact Information*
- *Change Opportunity Information on a Contact*
- *Change Contact Team Information on a Contact*
- *Change Address Information for a Contact*
- *View Financial Account Information on a Contact*
- *Change Note Information for a Contact*
- *Change Activity Information on a Contact*
- *View Product Recommendations for a Contact*
- *Apply for Products on a Contact*
- *Manage Application Information for a Contact*

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

Displaying Contact Details

Here's how to view contact details using the Contacts list.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 side pane:
    - **Opportunities.** Shows the opportunity information for the contact. For more information, see *Change Opportunity Information on a Contact*.
    - **Contact Team.** Shows the contact team information for the contact. For more information, see *Change Contact Team Information on a Contact*.
    - **Addresses.** Shows the address information for the contact. For more information, see *Change Address Information for a Contact*.
    - **Financial Accounts.** Shows the financial account information for the contact. For more information, see *View Financial Account Information on a Contact*.
    - **Notes.** Shows the note information for the contact. For more information, see *Change Note Information for a Contact*.
    - **Activities.** Shows the activity information for the contact. For more information, see *Change Activity Information on a Contact*.
    - **Recommendations.** Shows the product recommendations for the contact as recorded by the Intelligent Advisor needs analysis. For more information, see the following:
        - *Perform a Needs Analysis for a Contact*
        - *View Product Recommendations for a Contact*
    - **Applications.** Shows the application information for products for the contact. For more information, see *Manage Application Information for a Contact*.
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 Financial Services.
    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 side 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 side 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 side 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 side pane to return to the Contact 360 View.

d. In the Needs Analysis applet, conduct an Intelligent Advisor 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 *Perform a Needs Analysis for a Contact*.
   - Review product recommendations for the account as shown in *View Product Recommendations for a Contact*.
   - Start the application capture process for a product and then save or submit the application as shown in *Apply for Products on a Contact*.
   - Track applications for products, resume existing applications, and sign completed applications as shown in *Manage Application Information for a Contact*.

Performing Needs Analysis for Contacts

You perform a needs analysis for a contact to record information about the contact. However, you don't automatically create a financial application when you perform a needs analysis.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 Intelligent Advisor for the particular needs analysis selected in the previous step.

      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 Intelligent Advisor Policy Model set up for your implementation of the selected type of needs analysis.

Note: For information about integrating Intelligent Advisor for Siebel business applications, which includes creating and deploying policy model definitions in Intelligent Advisor, see *Siebel Self Service Administration Guide* . For information about the Intelligent Advisor-specific workflows for Siebel Financial Services, see *Overview of This Chapter*. The sample policy model that is shipped with Intelligent Advisor illustrates the capabilities of the integration between Intelligent Advisor and Siebel Mobile.

After completing the needs analysis interview, the Recommendations screen appears. For more information, see *View Product Recommendations for a Contact* and *Apply for Products on a Contact*.

Modifying Contact Information

Here's how to change contact information.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 must navigate away from the record to save your changes to it.
3. Create a new contact as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new contact on the form that appears, and then save the record.

Modifying Opportunity Information for a Contact

Here's how to change the opportunity information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 side pane.

   All opportunities associated with the contact appear in the Opportunities list in the main pan.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   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 side pane and then tap New (the double plus (++) icon) in the main pane.
   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

Here's how to change the contact team information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 side pane.

    All contact teams associated with the contact appear in the Contact Team list in the main pane.
    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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
    b. Select the person on the list that appears, and then tap OK.

Modifying Address Information for a Contact

Here's how to change address information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 side pane.

    All addresses associated with the contact appear in the Addresses list in the main pane.
    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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
    b. Select 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 side pane and then tap New (the double plus (++) icon) in the main pane.
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

Here's how to view the financial account information for a contact. You can't change financial account information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 side pane.

   All financial accounts associated with the contact appear in the Financial Accounts list in the main pane.
4. Tap the financial account that you want to view.

Modifying Note Information for a Contact

Here's how to change the note information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 side pane.

      All notes associated with the contact appear in the Notes list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new note on the form that appears, and then save the record.

Modifying Activity Information for a Contact

Here's how to change the activity information for a contact.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 side pane.

    All activities associated with the contact appear in the Activities list in the main pane.
    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 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 side pane and then tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new activity on the form that appears, and then save the record.

Viewing Recommendation Information for a Contact

Here's how 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 *Apply for Products on a Contact*.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 side pane.

    All product recommendations associated with the contact appear in the Recommendations list in the main pane.

    The product recommendations shown come from the needs analysis that you started in *Perform a Needs Analysis for a Contact*.

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.

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details for the selected contact in the main pane.
   - A list in the side 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 side pane and then 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.
5. In the Products applet, select a product and then tap Apply.

   Doing this initiates the application capture process from Intelligent Advisor for the product. The composition and structure of the application capture process varies according to the Intelligent Advisor Policy Model set up for your implementation of the application capture process for the selected product.

   > **Note:** For information about integrating Intelligent Advisor for Siebel business applications, which includes creating and deploying policy model definitions in Intelligent Advisor, see *Siebel Self Service Administration Guide* . For information about the Intelligent Advisor-specific workflows for Siebel Financial Services, start with *Workflows for Intelligent Advisor Interview Sessions*. The sample policy model that is shipped with Intelligent Advisor illustrates the capabilities of the integration between Intelligent Advisor and Siebel Mobile.

   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 *Manage Application Information for a Contact*.
   - **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 *Manage Application Information for a Contact*.
   - **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 haven't been submitted, and signing any submitted applications.

1. Tap Side Menu and then tap Contacts to display the following:
    - The Contacts list and details for the selected contact in the main pane.
    - A list in the side 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 side pane.

    All application information associated with the contact appears in the Applications list in the main pane.
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 Financial Services

A financial application is a form that an individual or company submits to set up a financial account.

This procedure is included in this section:

- *View Financial Application Details*

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

Displaying Financial Application Details

You can view financial application details using the Applications list. You can't change financial application information. This information originates in the non-mobile application for Siebel Financial Services.

1. Tap Side Menu and then tap Applications to display the Applications list and details for the selected financial application in the main pane.
2. Tap a financial application in the Financial Applications list.

Managing Opportunities for Siebel Financial Services

An opportunity is a potential revenue-generating event. It's usually associated with an account and one or more contacts, products, activities, and quotes.

These procedures are included in this section:

- *View Opportunity Details*
- *Change Opportunity Information*
- *Change Contact Information on an Opportunity*
- *Change Product Information on an Opportunity*
- *Change Quote Information on an Opportunity*
- *Change Activity Information on an Opportunity*
- *Change Opportunity Team Information on an Opportunity*

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

Displaying Opportunity Details

Here's how to see opportunity details using the Opportunities list.

1. Tap Side Menu and then tap Opportunities to display the following:
    - The Opportunities list and details for the selected opportunity in the main pane.
    - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected opportunity, tap the following names in the list in the side pane:

- **Contacts.** Shows the contact information for the opportunity. For more information, see *Change Contact Information on an Opportunity*.
- **Products.** Shows the product information for the opportunity. For more information, see *Change Product Information on an Opportunity*.
- **Quotes.** Shows the quote information for the opportunity. For more information, see *Change Quote Information on an Opportunity*.
- **Activities.** Shows the activity information for the opportunity. For more information, see *Change Activity Information on an Opportunity*.
- **Opportunity Team.** Shows the opportunity team information for the opportunity. For more information, see *Change Opportunity Team Information on an Opportunity*.

Modifying Opportunity Information

Here's how to change opportunity information.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
3. Create a new opportunity as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new opportunity on the form that appears, and then save the record.

Modifying Contact Information for an Opportunity

Here's how to change the contact information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity contact as follows:
   a. Tap Contacts in the list in the side pane.

All contacts associated with the opportunity appear in the Contacts list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   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 side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new contact on the form that appears, and then save the record.

Modifying Product Information for an Opportunity

Here's how to change the product information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity product as follows:
   a. Tap Products in the list in the side pane.
   All products associated with the opportunity appear in the Products list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new product on the form that appears, and then save the record.

Modifying Quote Information for an Opportunity

Here's how to change the quote information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity quote as follows:

   a. Tap Quotes in the list in the side pane.

      All quotes associated with the opportunity appear in the Quotes list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new quote on the form that appears, and then save the record.

Modifying Activity Information for an Opportunity

Here's how to change the activity information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:

   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity activity as follows:

   a. Tap Activities in the list in the side pane.

      All activities associated with the opportunity appear in the Activities list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
   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

Here's how to change the opportunity team information for an opportunity.

1. Tap Side Menu and then tap Opportunities to display the following:
   - The Opportunities list and details for the selected opportunity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing opportunity team as follows:
   a. Tap Opportunity Team in the list in the side pane.

      All opportunity teams associated with the opportunity appear in the Opportunity Team list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.
   b. Choose the person on the list that appears, and then tap OK.

Managing Households for Siebel Financial Services

A household is a group of people who live together in the same dwelling.

These procedures are included in this section:

- *View Household Details*
- *Change Household Information*
- *Change Contact Information for a Household*
- *View Note Information for a Household*
- *View Activity Information for a Household*
- *View Opportunity Information for a Household*
- *Viewing Financial Account Information for a Household*
- *Change Address Information for a Household*

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

Displaying Household Details

Here's how to see household details by using the Households list.

1. Tap Side Menu and then tap Households to display the following:
    - The Households list and details for the selected household in the main pane.
    - A list in the side 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 side pane:
    - **Contacts.** Shows the contact information for the household. For more information, see *Change Contact Information for a Household*.
    - **Notes.** Shows the note information for the household. For more information, see *View Note Information for a Household*.
    - **Activities.** Shows the activity information for the household. For more information, see *View Activity Information for a Household*.
    - **Opportunities.** Shows the opportunity information for the household. For more information, see *View Opportunity Information for a Household*.
    - **Financial Accounts.** Shows the financial information for the household. For more information, see *Viewing Financial Account Information for a Household*.
    - **Addresses.** Shows the address information for the household. For more information, see *Change Address Information for a Household*.

Modifying Household Information

Here's how to change household information.

1. Tap Side Menu and then tap Households to display the following:
    - The Households list and details for the selected household in the main pane.
    - A list in the side 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 must navigate away from the record to save your changes to it.
3. Create a new household as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new household on the form that appears, and then save the record.

Modifying Contact Information for a Household

Here's how to change 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.

1. Tap Side Menu and then tap Households to display the following:
    - The Households list and details for the selected household in the main pane.
    - A list in the side 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 side pane.

    All contacts associated with the household appear in the Contacts list in the main pane.
    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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
    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 side pane and then tap New (the double plus (++) icon) in the main pane.
    b. Enter the information for the new contact on the form that appears, and then save the record.

Viewing Note Information for a Household

Here's how to view the note information for a household.

You can view the note information that's associated with all contacts of the household. For information about changing the note information for each contact of the household, see *Change Note Information for a Contact*.

1. Tap Side Menu and then tap Households to display the following:
    - The Households list and details for the selected household in the main pane.
    - A list in the side 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 side pane.

    All notes associated with the household appear in the Notes list in the main pane.
4. Tap the note that you want to view.

Viewing Activity Information for a Household

Here's how to view the activity information for a household.

You can view the activity information that's associated with all contacts of the household. For information about changing the activity information for each contact of the household, see *Change Activity Information on a Contact*.

1. Tap Side Menu and then tap Households to display the following:
    - The Households list and details for the selected household in the main pane.
    - A list in the side 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 side pane.

   All activities associated with the household appear in the Activities list in the main pane.
4. Tap the activity that you want to view.

Viewing Opportunity Information for a Household

Here's how to view the opportunity information for a household.

You can view the opportunity information that's associated with all contacts of the household. For information about changing the opportunity information for each contact of the household, see *Change Opportunity Information on a Contact*.

1. Tap Side Menu and then tap Households to display the following:
    - The Households list and details for the selected household in the main pane.
    - A list in the side 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 side pane.

   All opportunities associated with the household appear in the Opportunities list in the main pane.
4. Tap the opportunity that you want to view.

Viewing Financial Account Information for a Household

Here's how to view the financial account information for a household. You can't change financial account information for a household.

You can view the financial account information that's associated with all contacts of the household. For information about viewing the financial account information for each contact of the household, *View Financial Account Information on a Contact*.

1. Tap Side Menu and then tap Households to display the following:

- The Households list and details for the selected household in the main pane.
- A list in the side 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 side pane.

   All financial accounts associated with the household appear in the Financial Accounts list in the main pane.
4. Tap the financial account that you want to view.

Modifying Address Information for a Household

Here's how to change the address information for a household.

1. Tap Side Menu and then tap Households to display the following:
   - The Households list and details for the selected household in the main pane.
   - A list in the side 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 side pane.

      All addresses associated with the household appear in the Addresses list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   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 side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new address on the form that appears, and then save the record.

Managing Financial Accounts for Siebel Financial Services

A financial account is a record of the monetary transactions for an individual or company.

These procedures are included in this section:

- *View Financial Account Details*
- *Change Service Request Information for a Financial Account*

- *View Balance History Information for a Financial Account*
- *View Transactions for a Financial Account*

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

Displaying Financial Account Details

You can display financial account details by using the Financial Accounts list. You can't change financial account information. This information originates in the non-mobile application for Siebel Financial Services.

1. Tap Side Menu and then tap Financial Accounts to display the following:
   - The Financial Accounts list and details for the selected financial account in the main pane.
   - A list in the side 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 side pane:
   - **Service Requests.** Shows the service request information for the financial account. For more information, see *Change Service Request Information for a Financial Account*.
   - **Balance History.** Shows the balance history information for the financial account. For more information, see *View Balance History Information for a Financial Account*.
   - **Transaction Detail.** Shows the transaction detail information for the financial account. For more information, see *View Transactions for a Financial Account*.

Modifying Service Request Information for a Financial Account

Here's how to change the service request information for a financial account.

1. Tap Side Menu and then tap Financial Accounts to display the following:
   - The Financial Accounts list and details for the selected financial account in the main pane.
   - A list in the side 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 side pane.
      All service requests associated with the financial account appear in the Service Requests list in the main pane.
   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 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 side pane and then tap New (the plus (+) icon) in the main pane.

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

Here's how to view the balance history information for a financial account.

1. Tap Side Menu and then tap Financial Accounts to display the following:
   - The Financial Accounts list and details for the selected financial account in the main pane.
   - A list in the side 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 side pane.

   All balance histories associated with the financial account appear in the Balance History list in the main pane.
4. Tap the balance history that you want to view.

Viewing Transaction Detail Information for a Financial Account

Here's how to view the transaction detail information for a financial account.

1. Tap Side Menu and then tap Financial Accounts to display the following:
   - The Financial Accounts list and details for the selected financial account in the main pane.
   - A list in the side 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 side pane.

   All transaction details associated with the financial account appear in the Transaction Detail list in the main pane.
4. Tap the transaction detail that you want to view.

Managing Activities for Siebel Financial Services

An activity is a task that you perform for a contact, account, or opportunity.

These procedures are included in this section:

- *View Activity Details*
- *Change Activity Information*
- *Change Contact Information on an Activity*
- *Change Employee Information for an Activity*

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

Displaying Activity Details

You can display activity details using the Activities list.

1. Tap Side Menu and then tap Activities to display the following:
    - The Activities list and details for the selected activity in the main pane.
    - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected activity, tap the following names in the list in the side pane:
    - **Contacts.** Shows the contact information for the activity. For more information, see *Change Contact Information on an Activity*.
    - **Employees.** Shows the employee information for the activity. For more information, see *Change Employee Information for an Activity*.

Modifying Activity Information

Here's how to change activity information.

1. Tap Side Menu and then tap Activities to display the following:
    - The Activities list and details for the selected activity in the main pane.
    - A list in the side 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 after the list in the main pane.
    b. Tap the record field that you want to update, and update the field value.

        You must navigate away from the record to save your changes to it.
3. Create a new activity as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new activity on the form that appears, and then save the record.

Modifying Contact Information for an Activity

Here's how to change the contact information for an activity.

1. Tap Side Menu and then tap Activities to display the following:
   - The Activities list and details for the selected activity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing activity contact as follows:
   a. Tap Contacts in the list in the side pane.

      All contacts associated with the activity appear in the Contacts list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   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 side pane and then tap New (the double plus (++) icon) in the main pane.
   b. Enter the information for the new contact on the form that appears, and then save the record.

Modifying Employee Information for an Activity

Here's how to change the employee information for an activity.

1. Tap Side Menu and then tap Activities to display the following:
   - The Activities list and details for the selected activity in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing activity employee as follows:
   a. Tap Employees in the list in the side pane.

      All employees associated with the activity appear in the Employees list in the main pane
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   b. Choose the employee on the list that appears, and then tap OK.

Managing Leads for Siebel Financial Services

A lead is a new prospect or existing customer who might become an opportunity.

These procedures are included in this section:

- *View Lead Details*
- *Change Lead Information*
- *Change Opportunity Information on a Lead*
- *Convert a Lead to an Opportunity*

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

Displaying Lead Details

You can display lead details by using the Leads list.

1. Tap Side Menu and then tap Leads to display the following:
   - The Leads list and details for the selected lead in the main pane.
   - A list in the side 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 after the list in the main pane.
3. To view the related items for the selected lead, tap the following name in the side pane:
   - **Opportunities.** Shows the opportunity information for the lead. For more information, see the following:
     - *Change Opportunity Information on a Lead*
     - *Convert a Lead to an Opportunity*

Modifying Lead Information

Here's how to change lead information.

1. Tap Side Menu and then tap Leads to display the following:

- The Leads list and details for the selected lead in the main pane.
- A list in the side 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 after the list in the main pane.
   b. Tap the record field that you want to update, and update the field value.

      You must navigate away from the record to save your changes to it.
3. Create a new lead as follows:
   a. Tap New (the plus (+) icon) in the main pane.
   b. Enter the information for the new lead on the form that appears, and then save the record.

Modifying Opportunity Information for a Lead

Here's how to change opportunity information for a lead.

1. Tap Side Menu and then tap Leads to display the following:
   - The Leads list and details for the selected lead in the main pane.
   - A list in the side 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 after the list in the main pane.
3. Update an existing lead opportunity as follows:
   a. Tap Opportunities in the list in the side pane.

      All opportunities associated with the lead appear in the Opportunities list in the main pane.
   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 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 side pane and then tap Add (the plus (+) icon) in the main pane.
   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 side pane and then tap New (the double plus (++) icon) in the main pane.
   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* .

1. Tap Side Menu and then tap Leads to display the following:
    - The Leads list and details for the selected lead in the main pane.
    - A list in the side 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 after the list in the main pane.
3. Tap Convert to convert the lead to an opportunity.

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.

10 Using Intelligent Advisor Workflows

Overview of This Chapter

This chapter includes information about the Intelligent Advisor workflows for Siebel Financial Services.

- *Workflows for Intelligent Advisor Interview Sessions*
- *Intelligent Advisor Integration Workflows for Siebel Financial Services*

Note: If you can't see all the detail in some larger workflow diagrams in this chapter, then you can view these workflows in Siebel Tools to see a clearer image.

Workflows for Intelligent Advisor Interview Sessions

This group of workflows controls processing for Oracle Intelligent Advisor interview sessions on a Siebel Public Sector Self Service web site. It includes the following workflows:

- *FINS Application Capture Opportunity Creation Process Workflow*
- *FINS OPA Get Meta Data Service For Account Workflow*
- *FINS OPA Get Meta Data Service For Contact Workflow*
- *OIA Submit For Contact FINS Need Analysis Workflow*
- *OIA Submit For FINS Application Capture Workflow*
- *OPA Submit For FINS Need Analysis Workflow*

Intelligent Advisor Integration Workflows for Siebel Financial Services

This group of Intelligent Advisor workflows control processing for Siebel Financial Services-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*
- *FINS Needs Analysis Contact Main Workflow*
- *FINS Application Capture Main Workflow*

FINS Needs Analysis Account Main Workflow

This workflow manages an interview session from Intelligent Advisor for a particular type of needs analysis for an account.

This workflow:

- Is called from the business component `FINS Needs Analysis Account`.
- Contains these 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

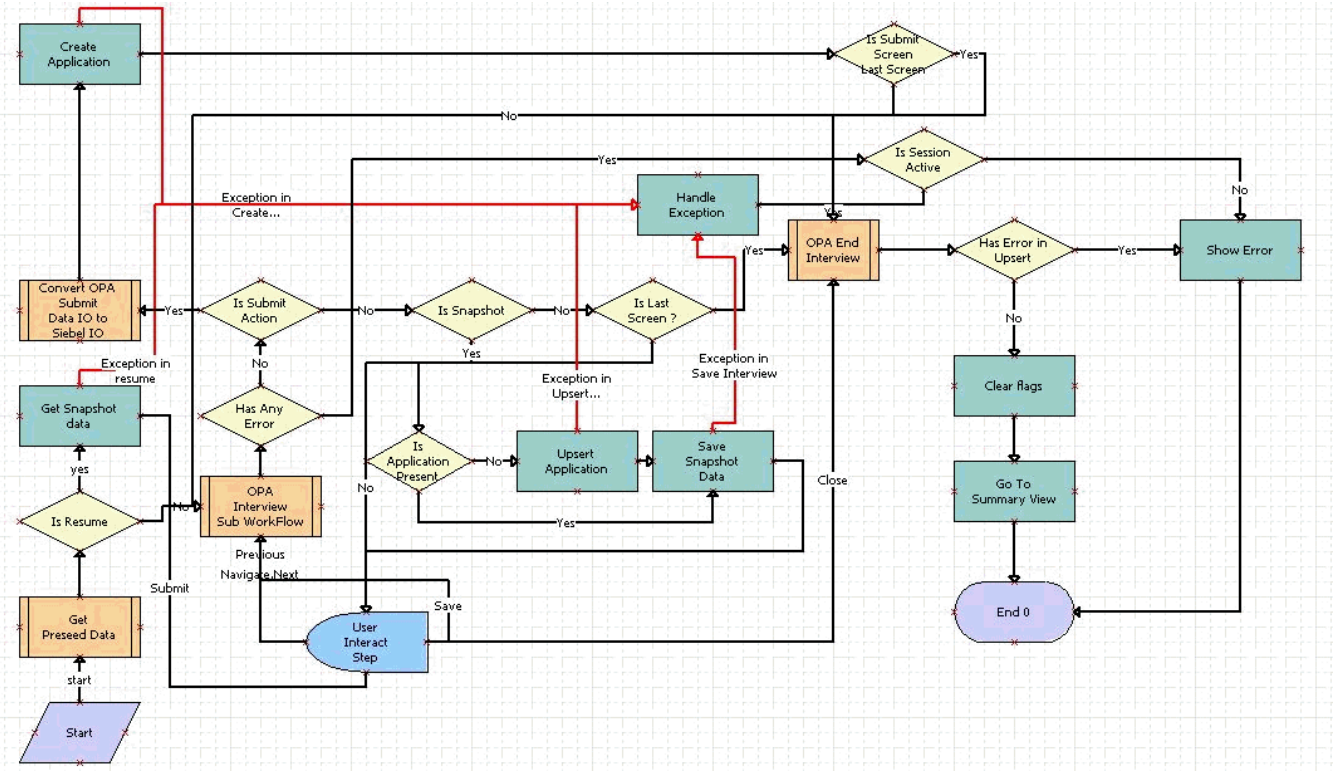
    Value:MappingName:FINSCheckingAccountMappings
- Uses the business component class, `CSSBCFINSIntw`.

  Note: 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 Apply Button method, `StartFINSInterview`.

The FINS Needs Analysis Account Main Workflow is the driver workflow to start a needs analysis for an account. The following image 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 Financial Services.



Workflow Description

This workflow performs these actions:

1. **Is Resume.** This step determines whether the action for the interview request applies to resuming an existing interview.
2. **OPA Get Preseed Data Workflow.** This step calls the 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 Intelligent Advisor 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 Intelligent Advisor 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 Workflow.** This step calls the OPA End Interview Workflow.
19. **Has Any Error.** This step determines whether the Intelligent Advisor 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 Intelligent Advisor.
21. **Clear Flags.** This step calls the Clearflags method from the Intelligent Advisor 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 Intelligent Advisor for a particular type of needs analysis for a contact.

This workflow:

- Is called from the business component, `FINS Needs Analysis Contact`.
- Contains these 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.

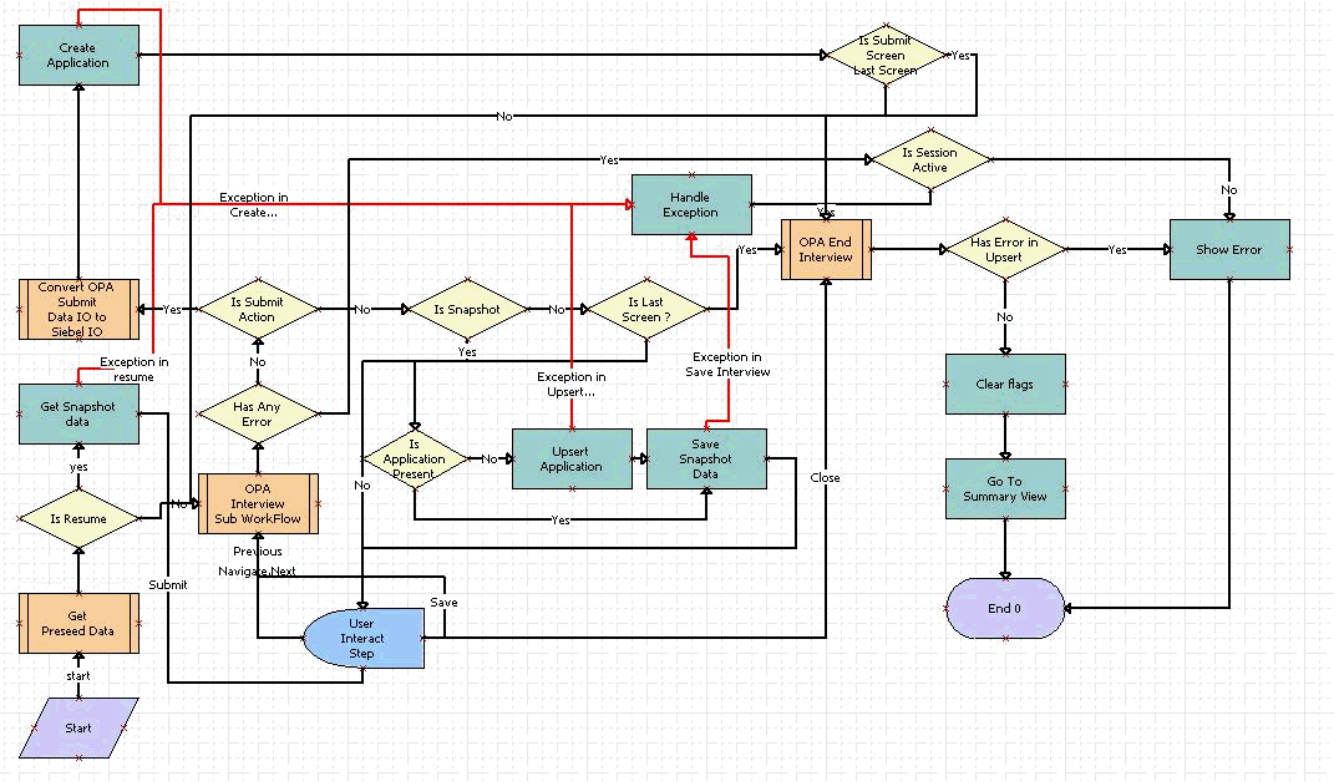
  This is a specialized class for business components, which supports the following business component user properties:

  - **`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. The following image 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 Financial Services.



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. **OPA Get Preseed Data Workflow.** This step calls the 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 Intelligent Advisor 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 Intelligent Advisor 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 Workflow.** This step calls the OPA End Interview Workflow.
19. **Has Any Error.** This step determines whether the Intelligent Advisor 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 Intelligent Advisor.
21. **Clear Flags.** This step calls the Clearflags method from the Intelligent Advisor 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 Intelligent Advisor to apply for a product. This workflow:

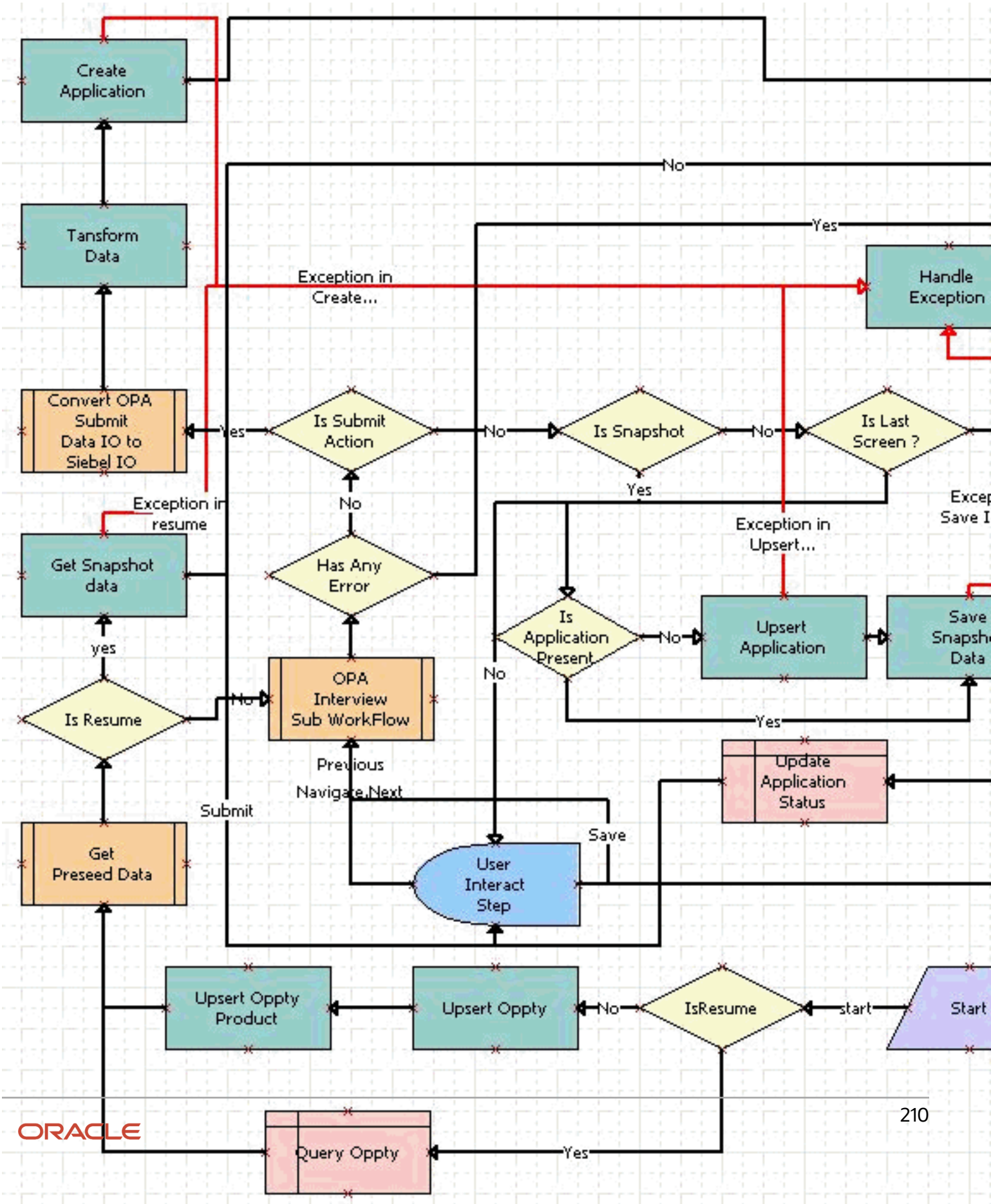
- Is called from the following business component: FINS Product.
- Contains the following business component user property:

  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. The following image 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.


Create Application
Tansform Data
Convert OPA Submit Data IO to Siebel IO
Get Snapshot data
Get Preseed Data
Upsert Oppty Product
Upsert Oppty
IsResume
Start
Query Oppty
Is Resume
OPA Interview Sub WorkFlow
Has Any Error
Is Submit Action
Is Snapshot
Is Last Screen ?
Handle Exception
Is Application Present
Upsert Application
Update Application Status
User Interact Step
Exception in Create...
Exception in resume
Exception in Upsert...
Submit
Save
Previous
Navigate.Next
No
Yes
yes
start

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 *FINS Application Capture Main Workflow*, add the product for which the application capture process is taking place.
4. **OPA Get Preseed Data Workflow.** This step calls the 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:
    - FrameEventMethodWFSave
    - FrameEventMethodWFNavigate
    - FrameEventMethodWFSubmit
    - FrameEventMethodWFMyApplications
    - FrameEventMethodWFClose
8. **Has Any Error.** This step determines whether the Intelligent Advisor 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 Intelligent Advisor 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 Intelligent Advisor 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 Workflow.** This step calls the OPA End Interview Workflow.
23. **Has Any Error.** This step determines whether the Intelligent Advisor 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 Intelligent Advisor.
25. **Clear Flags.** This step calls the Clearflags method from the Intelligent Advisor 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.

11 Using Embedded Interviews for Siebel Mobile Application for Siebel Financial Services

Overview of This Chapter

This chapter includes information about using DIV-based embedded interviews for Oracle Intelligent Advisor, with the Siebel Mobile application for Siebel Financial Services. It includes the following topics:

- *Using DIV-Based Embedded Interviews for Siebel Mobile Application for Siebel Financial Services*
- *Integration Mapping Parameters for Siebel Mobile Application for Siebel Financial Services*
- *Creating and Configuring Inbound Web Services for Siebel Mobile Application for Siebel Financial Services*
- *Sample Repository Objects for Siebel Mobile Application for Siebel Financial Services*
- *Workflows for Embedded Interviews for Siebel Mobile Application for Siebel Financial Services*
- *Reverting to the Old Intelligent Advisor Integration Approach*

Using DIV-Based Embedded Interviews for Siebel Mobile Application for Siebel Financial Services

This chapter includes information required for implementing DIV-based embedded interviews for the Siebel Mobile application for Siebel Financial Services. Support for DIV-based embedded interviews, which is new as of Siebel CRM 22.4 Update, provides a simpler integration framework than prior functionality to support Intelligent Advisor interviews for Siebel CRM applications users.

An example of a use case for embedded interviews for the Siebel Mobile application for Siebel Financial Services is where a customer of a financial institution wants help analyzing their financial needs (Needs Analysis scenario) and reviewing recommendations for financial products or services (Application Capture scenario). Configurable Siebel CRM workflow processes and sample seed data are provided that support the interview sessions for these two interrelated scenarios.

- **Needs Analysis scenario.** In this scenario, the user logs in to a Web site for a financial institution and starts an interview session to analyze their financial needs.
- **Application Capture scenario.** Depending on the results of the interview session in the first scenario, which are saved and returned to the user based on their input, this same user might subsequently start another interview session to review recommendations for financial products or services that might be suitable for them.

Note: This chapter describes integration mapping parameters, inbound Web services, sample repository objects, and workflow processes that are specific to the described sample use case for the Siebel Mobile application for Siebel Financial Services. However, *Siebel Self Service Administration Guide* contains further key information and configuration procedures for these entities, as well as information about business service access, manifest data, views and responsibilities, and more. Review the embedded interviews chapter in that guide for all information that might be pertinent to or required for your implementation of embedded interviews for the Siebel Mobile application for Siebel Financial Services.

System Requirements

Platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

- Oracle Intelligent Advisor Hub
- Oracle Policy Modeling
- Connection WSDL

Reverting to the Old Intelligent Advisor Integration Approach

As of Siebel CRM 22.4 Update, the new simpler embedded interview approach described in this chapter is enabled by default for Intelligent Advisor interviews. If you want to revert to the old integration approach for Intelligent Advisor interviews (which was introduced in Siebel CRM 15.5), you can do so by modifying business component properties as described in *Reverting to the Old Intelligent Advisor Integration Approach*. You can also switch back to the new method by reversing this process.

Reference to Intelligent Advisor Documentation

For documentation for Oracle Intelligent Advisor, see:

https://documentation.custhelp.com/euf/assets/devdocs/cloud21c/IntelligentAdvisor/en/Content/Guides/Default.htm

Integration Mapping Parameters for Siebel Mobile Application for Siebel Financial Services

The following integration mapping parameters are provided to be adapted for use cases for the Siebel Mobile application for Siebel Financial Services.

The integration maps provided for the Siebel Mobile application for Siebel Financial Services are FINSApplicationCaptureMappingsDIVBased, FINSCheckingAccountMappingsDivBased, and FINSCheckingContactMappingsDivBased.

Note: For additional information about configuring integration maps and mapping parameters, see *Siebel Self Service Administration Guide* .

Required Integration Mapping Parameters

All integration maps must include the parameters locale, Rulebase, and WebDeterminations URL, in addition to those listed later in this topic.

Parameter Name	Parameter Value	Expressio	Active Flag	Description
locale	en-US	N	Y	Required. The language in which the interview runs.
Rulebase	RuleBaseName	N	Y	Required. The name of the rulebase.
WebDeterminations URL	https://<host-name>:port>/<domain-name>/web-determinations	N	Y	Required. The URL of the Intelligent Advisor Hub for the Web determination engine.

Integration Mapping Parameters for FINSApplicationCaptureMappingsDIVBased

For the integration map FINSApplicationCaptureMappingsDIVBased (for the Siebel Mobile application for Siebel Financial Services), you can use or modify the following integration mapping parameters.

Parameter Name	Parameter Value	Expression	Active Flag
App BC Name	Opportunity	N	Y
App BO Name	Account	N	Y
App Context Type	LookupValue ('APPLICATION_CONTEXT_TYPE', 'FINS APPLICATION')	Y	Y
App Status Field	Sales Stage	N	Y
App Status Value	LookupValue ("FINS_APPLICATION_CAP_SALES_STG", "Saved")	Y	Y
Enable Snapshot Purge	True	N/A	N/A
IOName	FINS OPA Account	N	Y

Parameter Name	Parameter Value	Expression	Active Flag
IOXmlTag	ListOfFinsOpaAccount	N	Y
LoadSearchSpec	Account|Id|SeedAccountId;Opportunity|Id|ApplicationRowID;Opportunity Product|Id|OpptyProdId	N	Y
Login Id	LoginId()	Y	Y
New Application Status	LookupValue("PUB_APP_STATUS","Created")	Y	Y
OIAParamMapping	ApplicationRowID|ApplicationRowID;SeedAccountId|SeedAccountId;OpptyProdId|OpptyProdId;IOName|IOName;IOXmlTag|IOXmlTag;PrimaryIC|PrimaryIC;PrimaryICXmlTag|PrimaryICXmlTag;LoadSearchSpec|LoadSearchSpec;App Context Type|AppContextType;App Status Value|AppStatusValue;App BC Name|AppBC;App BO Name|AppBO;App Status Field|AppStatusField;Enable Snapshot Purge|EnableSnapshotPurge	N	Y
Preseed Search Spec	"[Account.Id]='"+LoginId()+"'"	Y	Y
PrimaryIC	Account	N	Y
PrimaryICXmlTag	Account	N	Y

Integration Mapping Parameters for FINSCheckingAccountMappingsDivBased

For the integration map FINSCheckingAccountMappingsDivBased (for the Siebel Mobile application for Siebel Financial Services), you can use or modify the following integration mapping parameters.

Parameter Name	Parameter Value	Expression	Active Flag
IOName	FINS OPA Account	N	Y
IOXmlTag	ListOfFinsOpaAccount	N	Y
LoadSearchSpec	Account|Row Id|ObjectId	N	Y
Login Id	LoginId()	Y	Y

Parameter Name	Parameter Value	Expression	Active Flag
New Application Status	LookupValue("PUB_APP_STATUS","Created")	Y	Y
OIAParamMapping	Login Id|LoginId;Preseed Search Spec|searchspec;ObjectId|ObjectId;IOName|IOName;IOXmlTag|IOXmlTag;PrimaryIC|PrimaryIC;PrimaryICXmlTag|PrimaryICXmlTag;ObjectId|RowId;LoadSearchSpec|LoadSearchSpec	N	Y
Preseed Search Spec	"[Account.Id]='"+LoginId()+"'"	Y	Y
PrimaryIC	Account	N	Y
PrimaryICXmlTag	Account	N	Y

Integration Mapping Parameters for FINSCheckingContactMappingsDivBased

For the integration map FINSCheckingContactMappingsDivBased (for the Siebel Mobile application for Siebel Financial Services), you can use or modify the following integration mapping parameters.

Parameter Name	Parameter Value	Expression	Active Flag
IOName	FINS OPA Contact	N	Y
IOXmlTag	ListOfFinsOpaContact	N	Y
LoadSearchSpec	Contact|Row Id|ObjectId	N	Y
Login Id	LoginId()	Y	Y
New Application Status	LookupValue("PUB_APP_STATUS","Created")	Y	Y
OIAParamMapping	Login Id|LoginId;Preseed Search Spec|searchspec;ObjectId|ObjectId;IOName|IOName;IOXmlTag|IOXmlTag;PrimaryIC|PrimaryIC;PrimaryICXmlTag|PrimaryICXmlTag;LoadSearchSpec|LoadSearchSpec	N	Y
Preseed Search Spec	"[Contact.Id]='"+LoginId()+"'"	Y	Y
PrimaryIC	Contact	N	Y

Parameter Name	Parameter Value	Expression	Active Flag
PrimaryICXmlTag	Contact	N	Y

Creating and Configuring Inbound Web Services for Siebel Mobile Application for Siebel Financial Services

To implement embedded interviews for the Siebel Mobile application for Siebel Financial Services, you must create and configure inbound Web services.

Note: For information you need to complete the task in this topic, you must also refer to the task topic for creating and configuring the inbound Web service for the integration framework in *Siebel Self Service Administration Guide* .

Create the following inbound Web services for the Siebel Mobile application for Siebel Financial Services:

- **FINS OPA Metadata Service for FINS Application Capture.** Follow the steps for creating and configuring the inbound Web service for the integration framework, with the following changes:
  - Specify the Name of this inbound Web service as `FINS OPA Metadata Service for FINS Application Capture`. Specify the same value for Comment.
  - Create the service ports for this inbound Web service as follows:

Name	Business Service/Business Process Name
FINSAppCapCheckAlivePort Create the operation FINSAppCap_CheckAlive.	OPA Metadata Service - CheckAlive
FINSAppCapGetMetadata Create the operation FINSAppCap_GetMetadata.	FINS OPA Get Meta Data Service For Account
FINSAppCapSave Create the operation FINSAppCap_Save.	OIA Submit For FINS Application Capture

- **FINS OPA Metadata Service for FINS OPA Account.** Follow the steps for creating and configuring the inbound Web service for the integration framework, with the following changes:
  - Specify the Name of this inbound Web service as `FINS OPA Metadata Service for FINS OPA Account.` Specify the same value for Comment.
  - Create the service ports for this inbound Web service as follows:

Name	Business Service/Business Process Name
FINSAccSave Create the operation FINSAcc_Save.	OPA Submit For FINS Need Analysis
FINSAccCheckAlivePort Create the operation FINSAcc_CheckAlive.	OPA Metadata Service - CheckAlive
FINSAccGetMetadataPort Create the operation FINSAcc_GetMetadata.	FINS OPA Get Meta Data Service For Account

- **FINS OPA Metadata Service for FINS OPA Contact.** Follow the steps for creating and configuring the inbound Web service for the integration framework, with the following changes:
  - Specify the Name of this inbound Web service as `FINS OPA Metadata Service for FINS OPA Contact.` Specify the same value for Comment.
  - Create the service ports for this inbound Web service as follows:

Name	Business Service/Business Process Name
FINSConSave Create the operation FINSCon_Save.	OIA Submit For Contact FINS Need Analysis
FINConCheckAlivePort Create the operation FINSCon_CheckAlive.	OPA Metadata Service - CheckAlive
FINSConGetMetadataPort Create the operation FINSCon_GetMetadata.	FINS OPA Get Meta Data Service For Contact

Name	Business Service/Business Process Name

Sample Repository Objects for Siebel Mobile Application for Siebel Financial Services

The following table describes some of the repository objects and object types that can be adapted for use with Intelligent Advisor embedded interviews for the Siebel Mobile application for Siebel Financial Services.

Note: For additional information about repository objects that you must configure, see *Siebel Self Service Administration Guide* .

Note: The sample repository objects below are examples for the sample use case scenarios for the Siebel Mobile application for Siebel Financial Services. Create as many records and child records as you require for your applications and use cases, using whatever fields you require.

Object Name	Object Type
FINS Account OPA Interview Applet	Applet
FINS Needs Analysis Form Applet - Mobile	Applet
FINS Contact OIA Interview Applet	Applet
FINS OPA Application Capture Applet DIV Based	Applet
FINS Needs Analysis	Business Component
FINS Opportunity Mobile	Business Component
FINS Needs Analysis Contact	Business Component
FINS Product	Business Component
FINS Mobile Accounts Screen	Screen
FINS Mobile Contacts Screen	Screen

Object Name	Object Type
FINS Account OPA Interview Service View	View
FINS Contact OPA Interview Service View	View
FINS OPA Application Capture View DIV Based	View
View Single Applet With Tabs OIA	Web Template
OPA Submit For FINS Need Analysis	Workflow Process
FINS Application Capture Oppty Creation Process	Workflow Process
OIA Submit For FINS Application Capture	Workflow Process
OIA Submit For Contact FINS Need Analysis	Workflow Process

Business Component User Properties

The following are user properties for some of the business components mentioned in the table:

- **Business Component: FINS Needs Analysis.** This business component supports the following user properties, with their default values shown:
  - **User Property: BCPreseedField1**

    ObjectId:FINS Account - Mobile.Id
  - **User Property: BCPreseedField2**

    ApplicationRowID:FINS Account - Mobile.Id
  - **User Property: Named Method**

    "StartFINSInterview", "INVOKE", "FINS Needs Analysis"
  - **User Property: WFInputArgs1**

    Business Service:OPA Interview Framework Service
  - **User Property: WFInputArgs2**

    Method:ResumeWebDeterminationInterview
  - **User Property: WFInputArgs3**

    GotoViewName:FINS Account OPA Interview Service View
  - **User Property: WFInputArgs6**

    workflowName:Go To OIA Interview View

- **Business Component: FINS Opportunity Mobile.** This business component supports the user property Named Method 1, with its default value shown:

  User Property: Named Method 1

  "ResumeFINSApplCap", "INVOKESVC", "FINS Opportunity Mobile", "OPA Interview Framework Service", "ResumeWebDeterminationInterview", "workflowName", "Go To OIA Interview View", "GotoViewName", "FINS OPA Application Capture View DIV Based", "ApplicationRowID", "[Id]", "SeedAccountId", "[Account Id]", "'Action'", "'RestoreSession'", "'OIAParams'", "'ApplicationRowID|SeedAccountId|Action'"

- **Business Component: FINS Needs Analysis Contact.** This business component supports the following user properties, with their default values shown:

  - **User Property: BCPreseedField1**

    ObjectId:FINS Contact - Mobile.Id
  - **User Property: Named Method**

    "StartFINSInterview", "INVOKE", "FINS Needs Analysis Contact"
  - **User Property: WFInputArgs1**

    Business Service:OPA Interview Framework Service
  - **User Property: WFInputArgs2**

    Method:ResumeWebDeterminationInterview
  - **User Property: WFInputArgs3**

    GotoViewName:FINS Contact OPA Interview Service View
  - **User Property: WFInputArgs6**

    workflowName:Go To OIA Interview View

Workflows for Embedded Interviews for Siebel Mobile Application for Siebel Financial Services

The following group of workflows controls processing for Intelligent Advisor interview sessions on a Web site that features DIV-based embedded interviews in the Siebel Mobile application for Siebel Financial Services. This topic describes the following workflows:

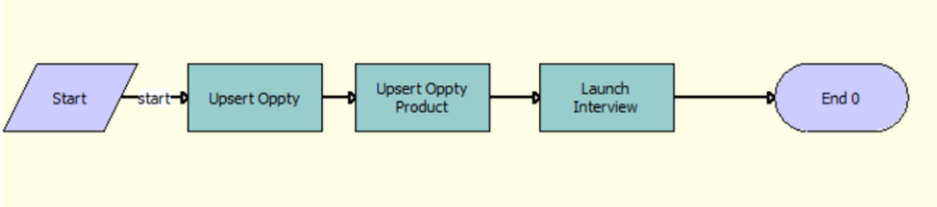
- *FINS Application Capture Opportunity Creation Process Workflow*
- *FINS OPA Get Meta Data Service For Account Workflow*
- *FINS OPA Get Meta Data Service For Contact Workflow*
- **Go to OIA Interview View Workflow.** Loads the interview view. See *Siebel Self Service Administration Guide* .
- **OIA Get Checkpoint Workflow.** Gets the checkpoint for an interview that is being resumed. See *Siebel Self Service Administration Guide* .
- **OIA Load Workflow Process Workflow.** Loads or pre-seeds the data for an interview. See *Siebel Self Service Administration Guide* .

- **OIA Set Checkpoint Workflow.** Performs an implicit save and creates a checkpoint from which an interview can be resumed later. See *Siebel Self Service Administration Guide* .
- *OIA Submit For Contact FINS Need Analysis Workflow*
- *OIA Submit For FINS Application Capture Workflow*
- *OPA Submit For FINS Need Analysis Workflow*

Note: Some of the workflows listed are also used by Siebel Public Sector Self Service. For more information about these workflows, see *Siebel Self Service Administration Guide* .

FINS Application Capture Opportunity Creation Process Workflow

This workflow creates the Opportunity ID. The following figure shows this workflow.



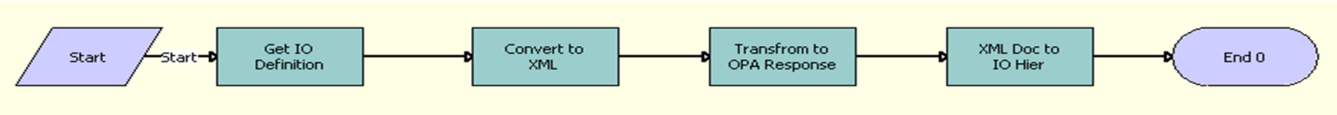
Workflow Description

This workflow performs the following actions:

1. **Upsert Oppty.** This step calls the UpsertRecord method in the PUB OPA Utilities Service. This step creates an opportunity (application) for the given account.
2. **Upsert Oppty Product.** This step calls the UpsertRecord method in the PUB OPA Utilities Service. For the opportunity created in the Upsert Oppty step, the workflow adds the product for which the application capture process is taking place.
3. **Launch Interview.** This step calls the ResumeWebDeterminationInterview method in the PUB OPA Utilities Service.

FINS OPA Get Meta Data Service For Account Workflow

This workflow prepares a response to a Simple Object Access Protocol (SOAP) GetMetadata request from the Intelligent Advisor Hub and sends the FINS OPA Account integration object back to Intelligent Advisor. The following figure shows this workflow.



Workflow Description

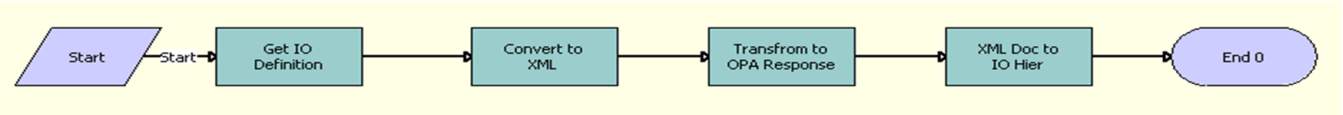
This workflow performs the following actions:

1. **Get IO Definition.** This step calls the GetIntegrationObjectInfo method from the Integration ObjectInfo Service business service. The input argument to this method is the name of the FINS OPA Account integration object. This method returns the metadata of the FINS OPA Account integration object.

2. **Convert to XML.** This step calls the IntObjHierToXMLDoc method from the EAI XML Converter business service to convert the hierarchy of the Siebel integration object into an XML document. The input argument to this method is the output of Step 1.
3. **Transform to OPA Response.** This step calls the Transform method from the EAI XSLT Service business service to perform the XSL transformation. An input argument to this method is the output of Step 2. Another input argument to this method is XSLTFileLocation, with a value of ../XSLT/GetMetaDataResp.xsl. This method returns the transformed data.
4. **XML Doc to IO Hier.** This step calls the GetIntegrationObjectInfo method from the Integration ObjectInfo Service business service to convert the transformed XML document into the get-metadata-response integration object. An input argument to this method is the output of Step 3. Another input argument to this method is IntObjectName with a value of get-metadata-response. The converted output is sent to Intelligent Advisor.

FINS OPA Get Meta Data Service For Contact Workflow

This workflow prepares a response to a Simple Object Access Protocol (SOAP) GetMetadata request from the Intelligent Advisor Hub and sends the FINS OPA Contact integration object back to Intelligent Advisor. The following figure shows this workflow.



Workflow Description

This workflow performs the following actions:

1. **Get IO Definition.** This step calls the GetIntegrationObjectInfo method from the Integration ObjectInfo Service business service. The input argument to this method is the name of the FINS OPA Contact integration object. This method returns the metadata of the FINS OPA Contact integration object.
2. **Convert to XML.** This step calls the IntObjHierToXMLDoc method from the EAI XML Converter business service to convert the hierarchy of the Siebel integration object into an XML document. The input argument to this method is the output of Step 1.
3. **Transform to OPA Response.** This step calls the Transform method from the EAI XSLT Service business service to perform the XSL transformation. An input argument to this method is the output of Step 2. Another input argument to this method is XSLTFileLocation with a value of ../XSLT/GetMetaDataResp.xsl. This method returns the transformed data.
4. **XML Doc to IO Hier.** This step calls the GetIntegrationObjectInfo method from the Integration ObjectInfo Service business service to convert the transformed XML document into the get-metadata-response integration object. An input argument to this method is the output of Step 3. Another input argument to this method is IntObjectName with a value of get-metadata-response. The converted output is sent to Intelligent Advisor.

OIA Submit For Contact FINS Need Analysis Workflow

This workflow manages an interview session from Intelligent Advisor for a particular type of needs analysis for contact. The following figure shows this workflow. This workflow:

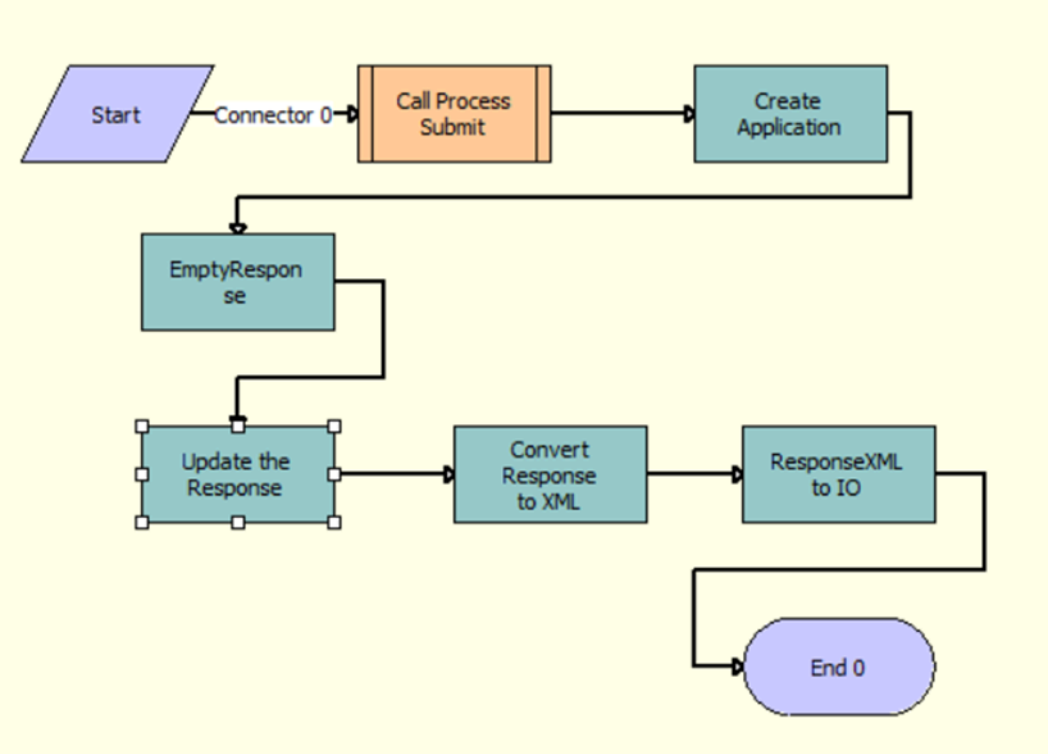
- Is called from the following Business Component: FINS Needs Analysis Contact.

- Contains the following Business Component User Property:

  Name: Named Method

  Value: "StartFINSInterview", "INVOKE", "FINS Needs Analysis Contact"

OIA Submit For Contact FINS Need Analysis is the driver workflow to start a needs analysis for a contact. A customer calls the OIA Submit For Contact FINS Need Analysis 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 Financial Services.



Workflow Description

This workflow performs the following actions:

1. **Call Process Submit.** This step calls the OIA Submit Sub Process workflow.
2. **Create Application.** This step calls the Upsert method from the EAI Siebel Adapter business service. The input arguments to this method are TransformedSubmitIO. The method returns the application number.
3. **EmptyResponse.** This step calls the CreateEmptyPropSet method from the PRM ANI Utility Service business service.
4. **Update the Response.** This step calls the Echo method from the Workflow Utilities business service. This step updates the ApplicationRowID in the Need analysis for Contact.
5. **Convert Response to XML.** This step calls the IntObjHierToXMLDoc method from the EAI XML Converter business service to convert the hierarchy of the Siebel integration object into an XML document.
6. **ResponseXML to IO.** This step calls the XMLDocToIntObjHier method from the EAI XML Converter business service to convert the XML data to an integration object.

OIA Submit For FINS Application Capture Workflow

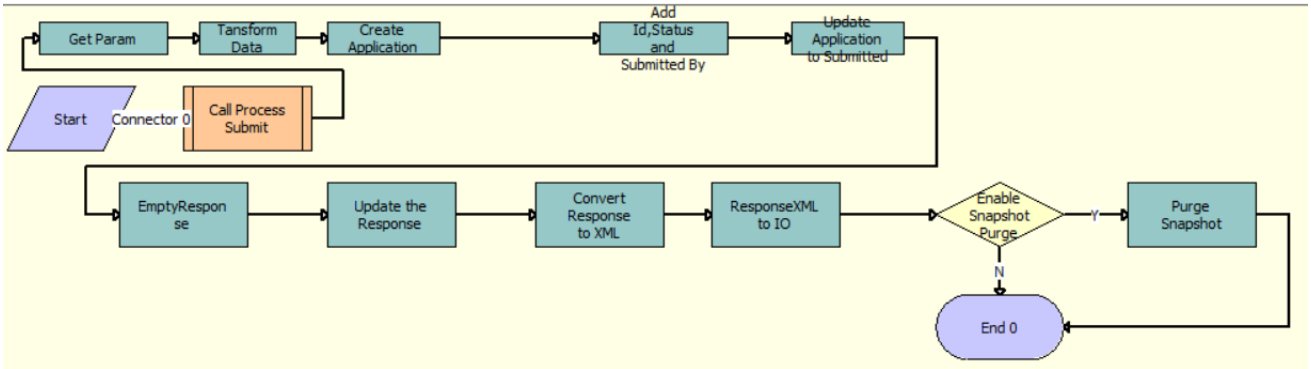
This workflow manages an interview session from Intelligent Advisor to apply for a product. The following figure shows this workflow. First, Opportunity ID is created by calling the FINS Application Capture Oppty Creation Process workflow. The OIA Submit For FINS Application Capture workflow:

- Is called from the following Business Component: FINS Product
- Contains the following Business Component User Property:

  Name: Named Method

  Value: "StartApplCapture", "INVOKESVC", "FINS Product", "Workflow Process Manager", "RunProcess", "'ProcessName'", "FINS Application Capture Oppty Creation Process", "SeedAccountId", "[Acc Id]", "SeedLeadId", "[Lead Id]", "SeedProductId", "[Id]", "workflowName", "Go To OIA Interview View", "GotoViewName", "FINS OPA Application Capture View DIV Based", "SeedProductName", "[Name]", "'OIAParams'", "'ApplicationRowID|SeedAccountId|OpptyProdId'"
- Uses the following Apply Button method: StartApplCapture. The OIA Submit For FINS Application Capture workflow drives the interview session.

A customer calls the OIA Submit For FINS Application Capture workflow by selecting a product and then tapping Apply in the Recommendations view of the Siebel Mobile application for Siebel Financial Services.



Workflow Description

This workflow performs the following actions:

1. **Call Process Submit.** This step calls the OIA Submit Sub Process workflow.
2. **Get Param.** This step calls the GetRequestParameter method from the OPA Interview Framework Service business service. This step contains all the parameter values for the current interview, which are saved to Siebel CRM. It returns Application Number, loginID and ApplicationRowID.
3. **Transform Data.** This step calls the Execute method from the EAI Data Transformation Engine business service. The input argument to this method is the FINS OPA Account integration object. This method returns the FINS OPA Account integration object.
4. **Create Application.** This step calls the Upsert method from the EAI Siebel Adapter business service. The input argument to this method is TransformedSubmitIO. This method returns Application Number.
5. **Add Id, Status, and Submitted By.** This step calls the AddPropertiesToPropertySet method from the OPA Interview Framework Service business service. The input arguments to this method are the ApplicationIntegrationObject (SiebelMessage), ApplicationRowID, Application Number, application status, application submitted by, and PropertySetPath. This method adds the properties to the property set at

the property set path and returns the updated property set as the UpdatedApplicationIntegrationObject (SiebelMessage).

6. **Update Application to Submitted.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are BC name, BO Name, Search Spec, and Inputfield (Status & Submitted By). This method updates the status of Application to Submitted.
7. **EmptyResponse.** This step calls the CreateEmptyPropSet method from the PRM ANI Utility Service business service.
8. **Update the Response.** This step calls the Echo method from the Workflow Utilities business service.
9. **Convert Response to XML.** This step calls the IntObjHierToXMLDoc method from the EAI XML Converter business service to convert the hierarchy of the Siebel integration object into an XML document.
10. **ResponseXML to IO.** This step calls the XMLDocToIntObjHier method from the EAI XML Converter business service to convert the XML data to an integration object.
11. **Enable Snapshot Purge.** This step determines whether Enable Snapshot Purge is True or False.
12. **Purge Snapshot.** This step calls the PurgeSnapshot method of the PUB OPA Utilities Service business service. It queries the saved snapshot record from the database and deletes it. The input arguments to this method are BC Name, BO Name, and Search Spec.

OPA Submit For FINS Need Analysis Workflow

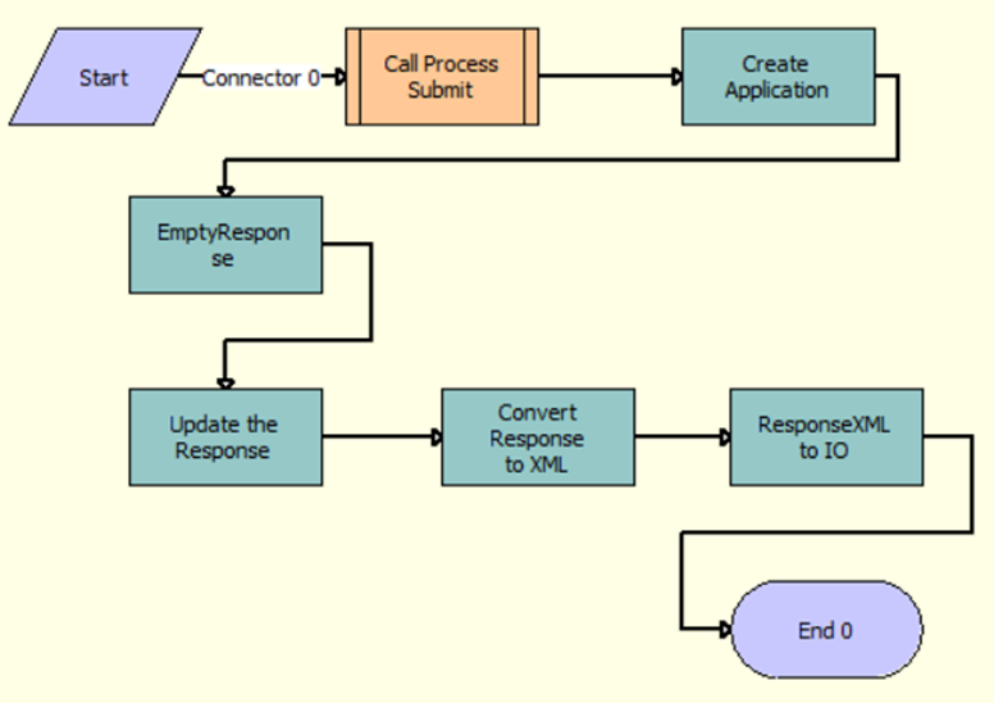
This workflow manages an interview session from Intelligent Advisor for a particular type of needs analysis for an account. The following figure shows this workflow. This workflow:

- Is called from the following Business Component: FINS Needs Analysis.
- Contains the following Business Component User Property:

  Name: Named Method

  Value: "StartFINSInterview", "INVOKE", "FINS Needs Analysis"

OPA Submit For FINS Need Analysis is the driver workflow to start a needs analysis for an account. A customer calls the OPA Submit For FINS Need Analysis 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 Financial Services.



Workflow Description

This workflow performs the following actions:

1. **Call Process Submit.** This step calls the OIA Submit Sub Process workflow.
2. **Create Application.** This step calls the Upsert method from the EAI Siebel Adapter business service. The input arguments to this method are TransformedSubmitIO. The method returns the application number.
3. **EmptyResponse.** This step calls the CreateEmptyPropSet method from the PRM ANI Utility Service business service.
4. **Update the Response.** This step calls the Echo method from the Workflow Utilities business service. This step is used to update the ApplicationRowID in the Need analysis for Account.
5. **Convert Response to XML.** This step calls the IntObjHierToXMLDoc method from the EAI XML Converter business service to convert the hierarchy of the Siebel integration object into an XML document.
6. **ResponseXML to IO.** This step calls the XMLDocToIntObjHier method from the EAI XML Converter business service to convert the XML data to an integration object.

Reverting to the Old Intelligent Advisor Integration Approach

As of Siebel CRM 22.4 Update, the new simpler embedded interview approach described in this chapter is enabled by default for Intelligent Advisor interviews, for sample rulebases in the Siebel Mobile application for Siebel Financial Services. If you want to revert to the old integration approach for Intelligent Advisor interviews (which was introduced in Siebel CRM 15.5), you can do so for the sample rulebases by modifying business component properties as described in this topic. You can also switch back to the new method by reversing these changes.

For information about how to do this task for Siebel Public Sector Self Service, see *Siebel Self Service Administration Guide* .

Reverting to the Old Approach for Sample Rulebases: FINS Needs Analysis Business Component

The following table shows the user property values to change on the FINS Needs Analysis business component to revert to the old approach for integrating Intelligent Advisor interviews for sample rulebases. To revert to the old approach, change all user property values listed back to the values for the old approach.

User Property Name	Value for Old Approach	Value for New Approach
BCPreseedField1	Rulebase:FINS Needs Analysis.Rule Base	ObjectId:FINS Account - Mobile.Id
BCPreseedField2	SeedAccountId:FINS Account - Mobile.Id	ApplicationRowID:FINS Account - Mobile.Id
Named Method	"StartFINSInterview", "INVOKE", "FINS Needs Analysis"	"StartFINSInterview", "INVOKE", "FINS Needs Analysis"
Named Method 1	"StartInterview", "INVOKESVC", "FINS Needs Analysis", "OPA Interface Service", "InvokeWorkflow", "'Rulebase'", "[Rule Base]", "'GotoViewName'", "'FINS Application View - Mobile'", "'Parent View'", "'Account'", "'WorkflowName'", "'FINS OPA Integration Workflow'", "'CloseBtnLOV'", "'SBL_OPA_CLOSE_BTN'"	<not used>
WFInputArgs1	Business Service:OPA Interview Framework Service	Business Service:OPA Interview Framework Service
WFInputArgs2	Method:InvokeWorkflow	Method:ResumeWebDeterminationInterview
WFInputArgs3	GotoViewName:FINS Account Recommendation View - Mobile	GotoViewName:FINS Account OPA Interview Service View
WFInputArgs4	WorkflowName:FINS Needs Analysis Account Main Workflow	<not used>
WFInputArgs5	MappingName:FINSCheckingAccountMappings	<not used>
WFInputArgs6	<not used>	workflowName:Go To OIA Interview View

Reverting to the Old Approach for Sample Rulebases: FINS Needs Analysis Contact Business Component

The following table shows the user property values to change on the FINS Needs Analysis Contact business component to revert to the old approach for integrating Intelligent Advisor interviews for sample rulebases. To revert to the old approach, change all user property values back to the values for the old approach.

User Property Name	Value for Old Approach	Value for New Approach
BCPreseedField1	Rulebase:FINS Needs Analysis Contact.Rule Base	ObjectId:FINS Contact - Mobile.Id
BCPreseedField2	SeedContactId:FINS Contact - Mobile.Id	<not used>
Named Method	"StartFINSInterview", "INVOKE", "FINS Needs Analysis Contact"	"StartFINSInterview", "INVOKE", "FINS Needs Analysis Contact"
Named Method 1	"StartInterview", "INVOKESVC", "FINS Needs Analysis", "OPA Interface Service", "InvokeWorkflow", "'Rulebase'", "[Rule Base]", "'GotoViewName'", "'FINS Application View - Mobile'", "'Parent View'", "'Contact'", "'WorkflowName'", "'FINS OPA Integration Workflow'", "'CloseBtnLOV'", "'SBL_OPA_CLOSE_BTN'"	<not used>
WFInputArgs1	Business Service:OPA Interview Framework Service	Business Service:OPA Interview Framework Service
WFInputArgs2	Method:InvokeWorkflow	Method:ResumeWebDeterminationInterview
WFInputArgs3	GotoViewName:FINS Contact Recommendation View - Mobile	GotoViewName:FINS Contact OPA Interview Service View
WFInputArgs4	WorkflowName:FINS Needs Analysis Contact Main Workflow	<not used>
WFInputArgs5	MappingName:FINSCheckingContactMappings	<not used>
WFInputArgs6	<not used>	workflowName:Go To OIA Interview View

Reverting to the Old Approach for Sample Rulebases: FINS Opportunity Mobile Business Component

The following table shows the Named Method 1 user property value to change on the FINS Opportunity Mobile business component to revert to the old approach for integrating Intelligent Advisor interviews for sample rulebases. To revert to the old approach, change the user property value back to the value for the old approach.

Value for Old Approach	Value for New Approach
"ResumeFINSApplCap", "INVOKESVC", "Opportunity", "OPA Interview Framework Service", "InvokeWorkflow", "'GotoViewName'", "'FINS Account Application View - Mobile'", "MappingName", "'FINSApplicationCaptureMappings'", "OpptyId", "[Id]", "Action", "RestoreSession", "SeedAccountId",	"ResumeFINSApplCap", "INVOKESVC", "FINS Opportunity Mobile", "OPA Interview Framework Service", "ResumeWebDeterminationInterview", "workflowName", "Go To OIA Interview View", "GotoViewName", "FINS OPA Application Capture View DIV Based", "ApplicationRowID", "[Id]", "SeedAccountId", "[Account Id]", "'Action'", "'RestoreSession'", "'OIAParams'", "'ApplicationRowID|SeedAccountId|Action'"

Value for Old Approach	Value for New Approach
"[Account Id]", "'Rulebase'", "'ApplicationCapture'"	

Reverting to the Old Approach for Sample Rulebases: FINS Product Business Component

The following table shows the user property values to change on the FINS Product business component to revert to the old approach for integrating Intelligent Advisor interviews for sample rulebases in the Siebel Mobile application for Siebel Financial Services. To revert to the old approach for the sample rulebases, change all user property values back to the values for the old approach.

User Property Name	Value for Old Approach	Value for New Approach
Named Method	<not used>	"StartApplCapture", "INVOKESVC", "FINS Product", "Workflow Process Manager", "RunProcess", "'ProcessName'", "FINS Application Capture Oppty Creation Process", "SeedAccountId", "[Acc Id]", "SeedLeadId", "[Lead Id]", "SeedProductId", "[Id]", "workflowName", "Go To OIA Interview View", "GotoViewName", "FINS OPA Application Capture View DIV Based", "SeedProductName", "[Name]", "'OIAParams'", "'ApplicationRowID|SeedAccountId|OpptyProdId'"
Named Method 8	"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]"	<not used>

12 Using CardDAV Dynamic Mapping

Siebel CardDAV Dynamic Mapping

This chapter includes information about how to set up and enable CardDAV dynamic mapping for Siebel. It contains the following topics:

- *About CardDAV*
- *Set Up CardDAV Dynamic Mapping for Siebel CRM*
- *Enable CardDAV Dynamic Mapping for Siebel CRM*
- *Default Supported CardDAV Clients*
- *Supported CardDAV Synchronization*
- *Contact Properties*
- *Contact Company Property*
- *Type Property*
- *Type Conversion Mappings*
- *Known Limitations for Siebel CardDAV Dynamic Mapping*
- *Known Limitations for Outlook CardDAV Clients*

About CardDAV

CardDAV (vCard Extensions to WebDAV) is a client-server protocol that lets users access and share address and contact data on a server.

CalDAV (Calendaring Extensions to WebDAV) is an internet standard designed to allow users to access and share calendar data on a remote server. By supporting both standards, users can view and update Siebel Business Application contact and address data and calendar information on Apple iOS 9.x mobile devices.

Setting Up CardDAV Dynamic Mapping for Siebel CRM

Before you can use CardDAV functionality in Siebel applications, you must set up CardDAV dynamic mapping. CardDAV dynamic mapping defines the mapping between Siebel objects and the CardDAV properties.

The Siebel CardDAV Sync module synchronizes the defined entities (address and contact data) accordingly between mobile devices and Siebel CRM applications.

Siebel CardDAV dynamic mapping supports:

- Google Maps Geocoding API integration (with geocoding response in JSON) to normalize address data.

> **Note:** Customers are responsible for Google Maps API licensing.

- Addresses containing non-ASCII characters.
- Non-US addresses with a specified Province or County.

Before setting up CardDAV dynamic mapping for Siebel CRM deployments, the following requirements apply:

- Install the latest Siebel Innovation Pack.
- Configure Transport Layer Security (TLS) in Siebel Application Interface. For more information, see *Siebel Security Guide* .
- Configure the server environment to enable CardDAV or CalDAV functionality. For more information, see *Siebel Installation Guide* and also *Siebel System Administration Guide* and additional documentation on Siebel Bookshelf for Siebel Enterprise Application Integration.
- In the Siebel CRM applications, valid email addresses must be associated with all Employees and Contacts. For each mobile user, the email address defined in Siebel CRM must match the user's email address on the mobile device. For more information, see *Siebel Applications Administration Guide* .
- Enable CardDAV dynamic mapping between Siebel objects and CardDAV properties. For more information, see *Enable CardDAV Dynamic Mapping for Siebel CRM*.
- Review the remaining sections in this appendix:
  - *Default Supported CardDAV Clients*
  - *Supported CardDAV Synchronization*
  - *Type Conversion Mappings*
  - *Known Limitations for Siebel CardDAV Dynamic Mapping*

Enabling CardDAV Dynamic Mapping for Siebel CRM

To set up CardDAV dynamic mapping between Siebel objects and CardDAV properties, do the following:

- Make sure that the following CardDAV Workflows are activated:
  - SiebDAV vCard Sync Decision Sub Process
  - SiebDAV vCard Sync Process
- (Required) Define System Preference to point to the CardDAV main workflow:

```
Name = "CardDAV Dynamic Mapping WFP"
Value = "SiebDAV vCard Sync Process"
```

- (Optional) To enable Google Maps Geocoding API integration to normalize the address, define System Preference for Google Maps Geocoding API integration as follows:

```
Name = "Google API Key"
Value = ""
```

  For more information about Google Maps Geocoding API, see *Google Maps Geocoding API Integration*.

Default Supported CardDAV Clients

Siebel CardDAV dynamic mapping is supported on:

- iOS 9.x mobile devices with vCard 3.0.
- Third-party CardDAV clients:
  - For Android, such as, Kerio Connect Sync Android client or CardDAV-Sync Android CardDAV client.
  - For Outlook, such as, Outlook CalDavSynchronizer plugin (sync Outlook with Google, SOGo, or any other CalDAV or CardDAV server).

  Note: These are examples of CardDAV clients and are not supported by Oracle.

To override the supported CardDAV clients, add the User Properties to the CalDAV Service business service where for example:

```
Name = "Supported CardDAV UserAgent Prefix 2"
Value = "iOS/10"
```

For example:

```
"Supported CardDAV UserAgent Prefix 2": "iOS/10"
```

The prefix in the Value field must be confirmed when the version information becomes available. You must define all the supported CardDAV UserAgent prefixes here so that you override the default supported prefix.

Supported CardDAV Synchronization

The following standard vCard 3.0 properties are supported for synchronization:

- *Contact Properties*
- *Contact Company Property*
- *Type Property*

Extension properties, except X-ABLabel and X_ABADR are not supported.

Unspecified properties are not supported and will not be preserved after synchronization.

Contact Properties

The following table lists the vCard 3.0 Contact properties that are supported with two-way synchronization (data upload and data download).

Contact Property	Maximum Supported Length
First Name (Required)	50
Last Name (Required)	50
Middle Name	50
Prefix	15. For more information, see *About the Prefix Contact Property*.
Suffix	15. For more information, see *About the Suffix Contact Property*.
Alias	50
Job Title	75
Note	255. Note that multiple lines of data are also supported.
Birthday	Not applicable. For more information, see *About the Birthday Contact Property*.

About the Prefix Contact Property

When uploading the Contact's prefix data to Siebel, the data is converted to LIC (language independent code) before saving the data in Siebel. If the data cannot be converted, then the prefix data is discarded. Invalid prefix data cannot be saved (because picklist is bounded) in Siebel.

- "Bounded Pick List: PickList MrMs
- "LOV Type: MR_MS

About the Suffix Contact Property

When uploading the Contact's suffix data to Siebel, the data is converted to LIC (language independent code) before saving the data in Siebel. If the data cannot be converted, then the suffix data is discarded. Invalid suffix data cannot be saved (because picklist is bounded) in Siebel.

- "Bounded Pick List: FIN PickList Suffix
- "LOV Type: FINS_SUFFIX_MLOV

About the Birthday Contact Property

Apple iOS supports no year-date data. Internally, iOS stores the year as 1604 for no year-date data. The earliest year-date data that Siebel supports is 1753. So when synchronizing with the iOS CardDAV client or Android CardDAV client, 1753 is used to indicate the no year-date data.

- When uploading data (upload synchronization), any year-date data less than or equal to 1753 is stored in Siebel as the year 1753.

  For example:

  April 1, 1754 on an iOS and Android CardDAV client uploads to Siebel as 04/01/1754.

  April 1, 1700 on an iOS and Android CardDAV client uploads to Siebel as 04/01/1753.

  April 1 on an iOS and Android CardDAV client uploads to Siebel as 04/01/1753
- When downloading data (download synchronization), the Siebel date year 1753 is converted to the year 1604, and the data shows up in the CardDAV client as follows:
  - In the iOS CardDAV client as no year-date data.
  - In the Android CardDAV client as date data with the year 1604.

    For example:

    04/01/1754 on Siebel downloads to the iOS and Android CardDAV client as April 1, 1754.

    04/01/1753 on Siebel downloads to the iOS CardDAV client as April 1.

    04/01/1753 on Siebel downloads to the Android CardDAV client as April 1, 1604.

Contact Company Property

The vCard 3.0 Contact Company property refers to the contact's Primary Account in Siebel, and is supported for (data download and upload) synchronization as follows:

- Uploading Company data is supported only for newly created contacts. Any updates made to the Company of an existing Contact are ignored and are not uploaded (or synchronized) to the server.
- The latest contact primary account data is downloaded again to the client in the subsequent synchronization.
- The Contact's Department data in Siebel is not supported for synchronization.

Note the following about deleting Contact Company data:

- If a user is not the primary sales team member of a contact, then that user cannot delete the contact on the server or the client. Because CardDAV client does not have the same record level access control that Siebel has, the user can still delete the contact on the client. Synchronization fails, however, during the subsequent data upload and the server (Siebel CardDAV service) returns an error code 403 in the log file. During the next synchronization, the deleted contact is re-downloaded from the server to the client.

- If a user is the primary sales team member of a contact, then that user can delete the contact on the server and the client. If the contact is deleted on the client and data upload synchronization is then performed, the deleted contact will be removed from the server as well.

Type Property

The vCard 3.0 Type or Label property supports the Siebel contact's Phone, Email, URL, and Address LOV types (child components). Siebel LOV types that are not a predefined type in the iOS and Android CardDAV client are handled as follows:

- When the vCard is constructed during data download synchronization, a custom label is automatically created for Siebel LOV types that are not a predefined type in the iOS and Android CardDAV client.
- Custom labels are not supported for Address on the Siebel side because there is no extra schema to store the custom label data for the Siebel Address object.
- Any non-Siebel LOV custom labels for Phone/Voice, Email, and URL are stored as a Personal type, and the custom label is stored in the Description field.
- Use a combination of Use Type and Description to handle some iOS and Android CardDAV client predefined types/labels as follows:
  - iOS CardDAV client phone's iPhone type Stored in Siebel:

    ```
    UseType="Cell" and Description="type=IPHONE"
    ```
  - iOS CardDAV client email's iCloud type Stored in Siebel:

    ```
    UseType="Personal" and Description="iCloud"
    ```
  - iOS CardDAV client URL's homepage type Stored in Siebel:

    ```
    UseType="Personal" and Description="_$!<HomePage>!$_"
    ```
  - Android CardDAV client phone's Company Main type Stored in Siebel:

    ```
    UseType="Personal" and Description="Company Main"
    ```
- If PhoneNumber, FaxNumber, EmailAddress, or URL data is not specified, then those entries are ignored and the information is discarded during upload synchronization to Siebel.

Type Property: Phone

The vCard 3.0 Type property supports the Siebel contact's Phone LOV type (child component) as follows:

- The VOICE and FAX Type property is supported.
- The Phone Number property is supported.
- The iOS-specific iPhone type is supported.
- Alphanumeric phone and fax numbers are supported.
- Custom labels for the TEL/VOICE type sent from the client are supported.

  If the custom label is not a Siebel Type entry, then the type is stored as Personal in Siebel and the custom label is stored in the Description field.
- Both iOS and Android CardDAV clients do not support the custom label for the Phone/Fax type.

If a Siebel user creates a fax number with a non-default type in Siebel (for example: Personal, Campus, or Dormitory), it becomes other fax type/label in the iOS and Android CardDAV client after synchronization. Eventually on the Siebel side, the Phone/Fax type is updated to other fax type implicitly.

- The Primary entry is handled as follows when synchronizing Siebel Phone/Fax data to the CardDAV client:
  - In the CardDAV/vCard client, there is only one TEL with type=pref entry (primary). In Siebel, TEL is split into Phone and Fax child components and each one has its own primary record.
  - When data comes from the CardDAV client into Siebel, the type=pref (VOICE or FAX) entry is honored as the primary in Siebel. The first non pref of another type is assigned as the Primary in Siebel.
  - When data is returned back to the CardDAV client, determining which Phone or Fax's primary entry is the original primary (type=pref entry) on the CardDAV client-side is difficult. Currently, the Phone's primary is chosen as the TEL's type=pref entry - however, this might unexpectedly change the user's setting.
- Updating a contact's Work Phone, Home Phone #, Cell Phone #, and Main Fax # is supported during CardDAV download synchronization, provided those numbers do not exist in the child Phone or Fax entries.

Download Synchronization

The supported behavior for download synchronization is as follows:

- The child Phone/Fax's existing primary entry based on the Contact's phone number will not be altered.
- The child Phone or Fax number will automatically be created in the CardDAV client (vCard) with the appropriate type only if no such number entry exists in the child Phone or Fax. If a child Phone or Fax number exists but the type is different, then another child Phone or Fax number will not be created.
  - Create a phone entry with label as work (iOS) or Work (Android) on client based on Contact's Work Phone #

    ```
    vCard: TEL;type=WORK;type=VOICE
    ```
  - Create a phone entry with label as home (iOS) or Home (Android) on client based on Contact's Home Phone #

    ```
    vCard: TEL;type=HOME;type=VOICE
    ```
  - Create a phone entry with label as mobile (iOS) or Mobile (Android) on client based on Contact's Cell Phone #

    ```
    vCard: TEL;type=CELL;type=VOICE
    ```
  - Create a fax entry with label as work fax (iOS) or Work Fax (Android) on client based on Contact's Main Fax #

    ```
    vCard: TEL;type=WORK;type=FAX
    ```

    > **Note:** Users will not be able to remove all phone entries from the CardDAV client if the server-side contact has at least one single value for Work Phone #, Home Phone #, Cell Phone #, and Main Fax #. The subsequent synchronization recreates the child phone entry based on the contact's single value phone/fax number.

Upload Synchronization

The supported behavior for upload synchronization is as follows:

- The Work Phone #, Home Phone #, Cell Phone #, and Main Fax # for contacts will be updated on the server only for newly created contacts.
- If a user updates an existing contact, the server-side Work Phone #, Home Phone #, Cell Phone # and Main Fax # data for the contact will not be modified.

Related Topic

Type Conversion Mappings

Type Property: Email

The vCard 3.0 Type property supports the Siebel contact's Email LOV type (child component) as follows:

- The Mail Type property is supported (maximum supported length is 100).
- The Email Address property is supported (maximum supported length is 100).
- The iOS-specific iCloud email type is supported.
- Custom labels sent from the client are supported.
  If the custom label is not a Siebel Type entry, then the type is stored as Personal in Siebel and the custom label is stored in the Description field.
- Updating a contact's single value Email Address property is supported.

Download Synchronization

The supported behavior for download synchronization is as follows:

- The child Email's existing primary entry based on the Contact's phone number will not be altered.
- The child Email entry will automatically be created in the vCard with work type only if no such email address entry exists in the child Email. If the child Email address entry exists but the type is different, then another child Email address entry will not be created.
  - Create an email entry with label as work (iOS) or Work (Android) on client based on Contact's Email Address

    ```
    vCard: EMAIL;type=INTERNET;type=WORK
    ```

> **Note:** Users will not be able to remove all emails from the CardDAV client if the server-side contact has a single value for Email Address. The subsequent synchronization recreates the child email based on the contact's single value Email Address.

Upload Synchronization

The supported behavior for upload synchronization is as follows:

- The Email Address for contacts will be updated on the server only for newly created contacts.

- If a user updates an existing contact, the server-side Email Address for the contact will not be modified.

Related Topic

Type Conversion Mappings

Type Property: URL

The vCard 3.0 Type property supports the Siebel contact's URL LOV type (child component) as follows:

- The URL Type property is supported (maximum supported length is 100).
- The URL Address property is supported (maximum supported length is 100).
- The primary URL is not supported (Siebel does not have the schema to support it).
- The iOS-specific homepage URL type is supported.
- Custom labels sent from the client are supported.

  If the custom label is not a Siebel Type entry, then the type is stored as Personal in Siebel and the custom label is stored in the Description field.

Related Topic

Type Conversion Mappings

Type Property: Address

The vCard 3.0 Type property supports the Siebel contact's Address LOV type as follows:

- The Address LOV type supports the child components listed in the following table. Note the following about the Address property type:
  - US and non US addresses are supported.

    During data upload synchronization, the iOS CardDAV client stores US address State data and non-US address Province or County data at the same Region portion of the ADR line. Siebel stores the Region data into the same appropriate State, Province, or County field.

    - US address State data is stored in the State field.
    - Ireland and United Kingdom County data is stored in the County field.
    - All other non-US address Province data is stored in the Province field whenever applicable.

    This behavior is enforced in the SiebDAV_vCardXMLToXMLDoc.xsl file.
  - If the display language for the iOS device is set to non-ENU, then the iOS CardDAV Address Country name is sent (during upload synchronization) in its own localized language display.

    Because of the bounded Country picklist restriction, the localized Country name must be converted into a language independent code (LIC) before it is stored and the data saved in Siebel. All en-us Country name-to-LIC conversion codes are defined in the SiebDAVCountryNameConversion.xsl file. However, there are only some examples of non-ENU Country name to LIC conversion codes in the same xsl file. To

support more non-ENU iOS display clients, the SiebDAVCountryNameConversion.xsl must be enhanced (by the customer) to include more languages.

- If the Country name is selected for an address in Siebel, then after the download synchronization, that Country name is displayed as is on the iOS CardDAV client.
- The US State data can be any text that the user enters on their device. If the US State data entered cannot be converted to the Siebel State LIC (language independent code), then it cannot be saved to the state field because the State field picklist is bounded. To prevent data loss, Siebel appends the unrecognizable US State name after the StreetAddress 2 field, and the data is separated with a comma (", ").
- If the Country name data entered (for example, Montenegro) cannot be converted to the Siebel Country LIC (language independent code), then it cannot be saved to the country field because the Country field picklist is bounded. To prevent data loss, Siebel appends the unrecognizable Country name after the StreetAddress 2 field, and the data is separated with a comma (", ").

- The custom label for Address is not supported when uploading data (upload synchronization) to Siebel. Siebel does not have the extra address field to store the custom label. After uploading data, Address shows up as empty/no type in Siebel and later becomes other type in the CardDAV client after downloading data (download synchronization)

Contact Property	Maximum Supported Length	Comments
Address Type	30	None.
Apartment Number	5	None.
Street Address	200	This required field will be set to "---" if it is not specified.
Street Address 2	100	None.
City	50	This required field will be set to "---" if it is not specified.
State	10	Bounded Pick list: PickList State LOV Type: STATE_ABBREV
Zipcode	30	None.
County	50	None.
Province	50	None.
Country	30	Bounded Pick list: PickList Country LOV Type: COUNTRY

Related Topic

Type Conversion Mappings

Google Maps Geocoding API Integration

Note: Customers are responsible for Google Maps API licensing.

Google Maps Geocoding API integration is supported to normalize the address. Note the following about Google Maps Geocoding API integration:

- The address line, containing the "ADR" property, in the vCard is processed.
- The address line, which contains none of the required Siebel fields, is validated:
  - To define the required Siebel fields, use the ValidvCardAddressLine Input Argument of the Workflow Process Step: "Normalize Address".
  - The default setting is ";;x;x;;;x" which indicates that the StreetAddress, City, or Country portion of the address data will be checked to see if it is empty. If any portion of the address is empty, then Google Maps Geocoding API is invoked to normalize the address data.
- The address line is reconstructed based on the Google Maps Geocoding API Response and vCardAddressFormat of the "CalDAV Service" Business Service user property:
  - The default setting for vCardAddressFormat is:

    ```
    ;;street_number route;locality;administrative_area_level_1;postal_code;country:long_name
    ```
  - You can customize different address formats for each country. The following address format for Germany is available by default:

    ```
    vCardAddressFormat-DE

    ;;route street_number;locality;;postal_code;country:long_name
    ```
- Siebel will keep the original address line unchanged if the address line data cannot be processed by Google (for example, if there is an empty response).
- Google Maps Geocoding API does not always handle the following entities as expected: PO Box, Apt#, or Unit#. In some cases, this data is lost after being processed by Google.
- Google Maps Geocoding API might return more than one "address_components". When this happens, all matching addresses that are returned from Google will be added to Siebel, and the address records will be cleansed later. For example, if the input address line contains only "San Jose", then the Google Maps Geocoding API might return, for example, the following matching addresses:

  ```
  "formatted_address" : "San Jose, CA, USA",
  "formatted_address" : "San Jose, NM 87565, USA",
  "formatted_address" : "San Jose, IL 62682, USA",
  ```

For more information about Google Maps Geocoding API and how to obtain the API key, see the following:

- https://developers.google.com/maps/documentation/geocoding/start
- https://developers.google.com/maps/documentation/geocoding/get-api-key
- https://developers.google.com/maps/documentation/geocoding/usage-limits

Related Topic

Type Conversion Mappings

Type Conversion Mappings

The following topics are included in this section:

- *Type Conversion Mappings for Phone*
- *Type Conversion Mappings for Fax*
- *Type Conversion Mappings for Email*
- *Type Conversion Mappings for URL*
- *Type Conversion Mappings for Address*

Note: Description values specified in this section do not contain the double quotes around the value

Type Conversion Mappings for Phone

The following table shows the type conversion mappings for phone.

Siebel Phone Type LOV	CardDAV Client	Display Label	vCard TEL/VOICE Type
Home	iOS	home	TEL;type=HOME;type=VOICE
	Android	Home	TEL;type=HOME;type=VOICE
Business	iOS	work	TEL;type=WORK;type=VOICE
	Android	Work	TEL;type=WORK;type=VOICE
Other	iOS	other	TEL;type=OTHER;type=VOICE
	Android	Other	TEL, or if it is a primary at Siebel then: TEL;type=OTHER;type=VOICE;type=pref
Cell	iOS	mobile	TEL;type=CELL;type=VOICE
	Android	Mobile	TEL;type=CELL;type=VOICE
Cell with Description = "type=IPHONE"	iOS	iPhone	TEL;type=IPHONE;type=CELL;type=VOICE
	Android	Custom label as iPhone	TEL;type=IPHONE;type=CELL;type=VOICE
Main	iOS	main	TEL;type=MAIN

Siebel Phone Type LOV	CardDAV Client	Display Label	vCard TEL/VOICE Type
	Android	Main	TEL;type=MAIN, supported only for download synchronization. There is no upload synchronization support. The vCard line sent becomes Tel;Type=VOICE;TYPE=PREF, and will be converted to Other type on the server.
Pager 1	iOS	pager	TEL;type=PAGER
	Android	Pager	TEL;type=PAGER
Personal	iOS and Android	Custom label as Personal	<group>.TEL <group>.X-ABLabel:Personal
Personal with Description = "MyCustLabel"or the Android's bold predefined labels	iOS and Android	Custom label as specified in Description Example: MyCustLabel	<group>.TEL <group>.X-ABLabel: MyCustLabel
	Android	Predefined labels: 1. Callback 2. Car 3. Company Main 4. ISDN 5. Radio 6. Telex 7. TTY TDD 8. Work Mobile 9. Work Pager 10. Assistant 11. MS	1. <group>.X-ABLabel:callback 2. TEL;TYPE=CAR 3. <group>.TEL;TYPE=VOICE;TYPE=WORK 4. TEL;TYPE=ISDN 5. <group>.X-ABLabel:radio 6. <group>.X-ABLabel:telex 7. <group>.X-ABLabel:TTY/TDD 8. TEL;type=VOICE;type=CELL;type=WORK After download-synchronization from the server to the client, the Android client cannot consume this type definition. So the label becomes Other on the Android CardDav client. 9. TEL;type=PAGER;type=WORK 10. <group>.X-ABLabel:assistant 11. <group>.TEL;TYPE=CELL <group>.X-ABLabel:mms
All other LOV values: • Campus • Dormitory • Fax • Pager 2	iOS and Android	Custom label as LovValue	<group>.TEL <group>.X-ABLabel: <LovValue>

Siebel Phone Type LOV	CardDAV Client	Display Label	vCard TEL/VOICE Type
• Telex • Work The Work custom type has an uppercase W. Do not confuse this with the iOS's default work type (which has a lowercase w)			

Type Conversion Mappings for Fax

The following table shows the type conversion mappings for fax. Note the following:

- The iOS and Android CardDAV clients do not support the custom label for the TEL/FAX type. You must convert Personal, Campus, and Dormitory types to the other fax type when downloading data (download synchronization) to CardDAV clients.
- After the next data upload (client upload synchronization), any Siebel-side Fax entries of type Personal, Campus, or Dormitory will be updated to Other type implicitly.

Siebel Fax Type LOV	CardDAV Client	Display Label	vCard TEL/FAX Type
Home	iOS	home fax	TEL;type=HOME;type=FAX
Home	Android	Home Fax	TEL;type=HOME;type=FAX
Business	iOS	work fax	TEL;type=WORK;type=FAX
Business	Android	Work Fax	TEL;type=WORK;type=FAX
Other	iOS	other fax	TEL;type=OTHER;type=FAX
v	Android	Other Fax	TEL;type=OTHER;type=FAX
All other LOV Values • Personal • Campus • Dormitory	iOS	other fax	TEL;type=OTHER;type=FAX
	Android	Other fax	TEL;type=OTHER;type=FAX

Type Conversion Mappings for Email

The following table shows the type conversion mappings for email.

Siebel Email Type LOV	CardDAV Client	Display Label	vCard EMAIL Type
Home	iOS	home	EMAIL;type=INTERNET;type=HOME
Home	Android	Home	EMAIL;type=INTERNET;type=HOME
Business	iOS	work	EMAIL;type=INTERNET;type=WORK
Business	Android	Work	EMAIL;type=INTERNET;type=WORK
Other	iOS	other	<group>.EMAIL;type=INTERNET <group.X-ABLabel:_$!<Other>!$_
Other	Android	Other	EMAIL;type=INTERNET
Personal	iOS and Android	Custom label as Personal	<group>.EMAIL;type=INTERNET <group>.X-ABLabel:Personal
Personal with Description "MyCustLabel"	iOS and Android	Custom label as specified in Description Example: MyCustLabel	<group>.EMAIL;type=INTERNET <group>.X-ABLabel: MyCustLabel
All other LOV Values • Campus • Dormitory	iOS and Android	Custom label as LovValue	<group>.EMAIL;type=INTERNET <group>.X-ABLabel:<LovValue>

Type Conversion Mappings for URL

The following table shows the type conversion mappings for URL.

Siebel URL Type LOV	CardDAV Client	Display Label	vCard URL Type
Home	iOS	home	URL;type=HOME

Siebel URL Type LOV	CardDAV Client	Display Label	vCard URL Type
Home	Android	Home	URL;type=HOME
Business	iOS	work	URL;type=WORK
Business	Android	Work	URL;type=WORK
Other	iOS	other	<group>.URL <group.X-ABLabel:_$!<Other>!$_
Other	Android	Other	URL;type=OTHER
Personal	iOS and Android	Custom label as Personal	<group>.URL <group>.X-ABLabel:Personal
Personal with Description "MyCustLabel"	iOS and Android	Custom label as specified in Description Example: MyCustLabel	<group>.URL <group>.X-ABLabel: MyCustLabel
All other LOV Values • Campus • Dormitory	iOS and Android	Custom label as LovValue	<group>.URL <group>.X-ABLabel: <LovValue>

Type Conversion Mappings for Address

The following table shows the type conversion mappings for address. Note the following:

- Siebel contact Address types (Mailing Address and Business) not in the CardDAV's default types become the custom label automatically after data download synchronization to the CardDAV client.
- An empty address type in Siebel becomes other type in the CardDAV client after data download.
- The Siebel contact Address does not have an additional field to hold a custom label. As a result, the ADR entry with custom label will become empty (no value) Address type in Siebel. And the custom label defined in the CardDAV client is cleared or lost after data upload synchronization to Siebel Server. Eventually after data download synchronization, all address custom labels become other type in the CardDAV client.

Siebel Address Type LOV	CardDAV Client	Display Label	vCard ADR Type
Mailing Address	iOS	home	<group>.ADR;type=HOME <group>.X-ABADR:<CountryCode>

Siebel Address Type LOV	CardDAV Client	Display Label	vCard ADR Type
Mailing Address	Android	Home	ADR;type=HOME
Business	iOS	work	<group>.ADR;type=WORK <group>.X-ABADR:<CountryCode>
Business	Android	Work	ADR;type=WORK
<empty, no type specified>	iOS	other	<group>.ADR;type=OTHER <group>.X-ABADR:<CountryCode>
<empty, no type specified>	Android	Other	ADR
All other LOV Values • Billing • Service • Shipping • Primary Address • Customer Premise • Rate Center • Wire Center • Central Office • Seasonal • Temporary	iOS and Android	Custom label as LovValue	<group>.ADR <group>.X-ABLabel:LovValue iOS Only: <group>.X-ABADR:<CountryCode>

Known Limitations for Siebel CardDAV Dynamic Mapping

The known limitations for Siebel CardDAV dynamic mapping include the following:

1. The First Name and Last Name fields are required fields for a Contact in Siebel.
   The CardDAV client data upload synchronization fails if one or both of these fields are not specified. The CardDAV client will not notify the user about the error during data upload synchronization. Users must make sure that both First Name and Last Name fields are filled in for new Contacts on the CardDAV client.
   The sample code in the SiebDAV_vCardXMLToXMLDoc.xsl file defaults the First Name and Last Name field to "---" if the field is empty. Customers can enable the section of code as required
   Data download synchronization is blocked until the invalid contact data (that is, the empty Last Name field) is fixed or the invalid contact is deleted.

2. Data upload synchronization failure occurs if an identical StreetAddress and City are entered for different countries.

   The root cause of this is a duplicate key violation for the Address Name field. The Address Name field is constructed from the StreetAddress and City fields based on several calculated fields in the CUT Address business component. Customers must review the CUT Address business component to see if they need to change the construction of the Address Name field or not.
3. (Android only). After a data upload synchronization failure, the subsequent creation of valid contacts will result in duplicate contacts being created on the server through any future data upload synchronization.

   The root cause of this is that the Android CardDAV client resends the PUT request of the same contact with a different UID. The iOS CardDAV client does not have this issue because iOS CardDAV clients resend the same contact with the same UID.
4. When uploading the Contact's Prefix data to Siebel, the data is converted to LIC (language independent code) before saving the data in Siebel. If the data cannot be converted, then the prefix data is discarded. Invalid prefix data cannot be saved (because picklist is bounded) in Siebel.
5. When uploading the Contact's Suffix data to Siebel, the data is converted to LIC (language independent code) before saving the data in Siebel. If the data cannot be converted, then the suffix data is discarded. Invalid suffix data cannot be saved (because picklist is bounded) in Siebel.
6. Uploading a Contacts' Company data is supported only for newly created contacts. Any updates made to the Company of an existing Contact are ignored and are not uploaded (or synchronized) to the server.
7. The iOS and Android CardDAV clients do not support the custom label for the Phone/Fax type. If a user creates a Fax number with a non-default type (for example: Personal, Campus, or Dormitory) in Siebel, it becomes an other fax type on the iOS and Android CardDAV client after synchronization. Eventually on the Siebel side, the type will be updated to Other type implicitly.
8. If PhoneNumber, FaxNumber, EmailAddress, or URL data is not specified, then those entries are ignored and the information is discarded during upload synchronization to Siebel.
9. US State data can be any text that the user enters on their device. If the US State data entered cannot be converted to the Siebel State LIC (language independent code), then it cannot be saved to the state field because the State field picklist is bounded. To prevent data loss, Siebel appends the unrecognizable US State name after the StreetAddress 2 field, and the data is separated with a comma (", ").
10. If the Country Name data entered (for example, Montenegro) cannot be converted to the Siebel Country LIC (language independent code), then it cannot be saved to the country field because the Country field picklist is bounded. To prevent data loss, Siebel appends the unrecognizable Country name after the StreetAddress 2 field, and the data is separated with a comma (", ").
11. For Siebel Address, Country is not a required field. If the Country field is empty after data download synchronization to the iOS client, then it will default to the current Region of the iOS device.

    Using the United States region as an example, if the issue occurs for an address created on the iOS client where the Country (for example: Montenegro) data is not supported by Siebel. After data upload synchronization to Siebel, the Country field data is empty. Then after data download synchronization to the iOS CardDAV client, the Country field data is United States.
12. The Siebel contact Address does not have an additional field to hold a custom label. As a result, the Address entry with custom label will become an empty (no value) Address type in Siebel. And the custom label defined in the CardDAV client is cleared or lost after data upload synchronization to Siebel Server. Eventually after data download synchronization, all address custom labels become Other type in the CardDAV client.
13. (Android only). The Android CardDAV client does not include the display language of the device when sending requests (in the HTTP header's "Accept Language" property) to Siebel. As a result, Siebel sends back only the Address Country name in en-us display to the Android CardDAV client. This is not an issue for the iOS CardDAV client.
14. The Google Maps Geocoding API does not always handle PO Box. Apt#, or Unit# data as expected. In some cases, this data is lost after API processing.

15. The Google Maps API may return more than one address. All matching addresses returned from Google are added to Siebel. Multiple returned addresses are cleansed separately later.

Known Limitations for Outlook CardDAV Clients

Note: Oracle does not support any Outlook CardDAV clients.

Outlook CalDav Synchronizer is a CardDAV client (for more information, see https://sourceforge.net/projects/outlookcaldavsynchronizer/). The recommended synchronization profile option settings for Outlook CalDav Synchronizer are as follows:

- **Outlook settings.** Select the following check box:

  `Synchronize items immediately after change`

- **Sync settings.** Set the following settings:

  `Synchronization Mode: Outlook <— —> Server (Two-Way)`

  `Conflict Resolution: Automatic`

To enable Outlook CalDav Synchronizer, define the following user properties for the CalDAV Service business service:

- `"Supported CardDAV UserAgent Prefix n" = "CalDavSynchronizer"`

  Select an appropriate number for n.

- `"CardDAV Put Use Actual ETag: CalDavSynchronizer" = "y"`

  This optional user property is required for CardDAV clients to make sure that client-side changes will not be overridden by the server data. CalDav Synchronizer must be the same as the supported prefix.

Outlook CalDAV Synchronizer Limitations

Some of the known limitations for Outlook CalDav Synchronizer CardDAV clients are as follows, consult your Outlook CardDAV client vendor for further details:

1. Outlook CardDAV Client uses the native Outlook Contact UI for users to update contact data. However, Outlook allows only a fixed number of Contact Emails (3), Web pages (1), Phone numbers (16 phones and 3 faxes), and Addresses (3).
2. Data loss occurs if more than the supported number of contact child entries are downloaded to the Outlook CardDAV client.
   - Outlook contact supports only 3 Emails:
     - E-mail: maps to vCard's EMAIL WORK type, Siebel's Business type
     - E-mail 2: maps to vCard's EMAIL HOME type, Siebel's Home type
     - E-mail 3: maps to vCard's EMAIL OTHER type (no type), Siebel's Other type

     Where more than one Business, Home, or Other type Email entry is created on the server, only one entry of each type is kept for the Outlook Contact after download synchronization.
   - Outlook contact supports only 1 Web page (URL)

- Web page: maps to vCard's URL WORK type, Siebel's Business type

Where more than one Business or Home type URL entry is created on the server, only one entry of each type is kept for the Outlook Contact after download synchronization. The Other type of URL entry is always discarded after download synchronization.

- Outlook contact supports 19 Phone numbers but only 13 of them (10 phones and 3 faxes) are uploaded to the server, 6 phone number type entries are removed from the Outlook contact.

  - Business: maps to vCard's TEL WORK type, Siebel's Business type
  - Business 2: maps to vCard's TEL WORK type, Siebel's Business type
  - Home: maps to vCard's TEL HOME type, Siebel's Home type
  - Home 2: maps to vCard's TEL HOME type, Siebel's Home type
  - Mobile: maps to vCard's TEL CELL type, Siebel's Cell type
  - Other: maps to vCard's TEL OTHER type, Siebel's Other type
  - Pager: maps to vCard's TEL PAGER type, Siebel's Pager 1 type
  - Car: maps to vCard's TEL CAR type, Siebel's Car custom label
  - ISDN: maps to vCard's TEL ISDN type, Siebel's ISDN custom label
  - Primary: maps to vCard's TEL MAIN type, Siebel's Main type
  - Business Fax: maps to vCard's TEL FAX WORK type, Siebel's Business Fax type
  - Home Fax: maps to vCard's TEL FAX HOME type, Siebel's Home Fax type
  - Other Fax: maps to vCard's TEL FAX OTHER type, Siebel's Other Fax type
  - The following 6 Outlook Contact phone number type entries are never synchronized to the server (that is, never sent out by the CardDAV client) and are lost:

    Assistant, Callback, Company, Radio, Telex, TTY/TDD type

- Outlook contact supports only 3 Addresses:

  - Business: maps to vCard's ADR WORK type, Siebel's Business type
  - Home: maps to vCard's ADR HOME type, Siebel's Home type
  - Other: maps to vCard's ADR OTHER type (no type), Siebel's Other type (empty type)

Where more than one Business, Home, or Other type Address entry is created on the server, only one entry of each type is kept for the Outlook Contact after download synchronization.

3. Outlook Contact cannot display any entries with custom labels sent from the server. Custom label entries are not lost, they are returned for upload synchronization to the server.

OpenProtocols DAVClient Limitations

The OpenProtocols DAVClient (http://www.arpdev.com) has similar limitations to those described in *Outlook CalDAV Synchronizer Limitations*, however, note the following differences:

1. **Data loss might occur.** Unlike the CalDAVSynchronizer CardDAV client, data loss for the OpenProtocols DAVClient occurs for custom label entries after download synchronization.
2. **Duplicate data might occur.** The OpenProtocols DAVClient CardDAV client expects the vCard entries to be in a certain order (for example: Email addresses in home, work, and other order). If data is not in this order, then duplicate email addresses appear for the Outlook contact.
3. **Duplicate contacts might appear after upload synchronization to the server.** In some cases after updates are made to the contact in Outlook, the OpenProtocols DAVClient CardDAV client uploads the changes using

different UIDs (sometimes the original UID.vcf is used, sometimes a totally different UID is used), and this causes the upload synchronization to create a new or duplicate contact on the server.

For example, if you create a new contact on the Outlook CardDAV client, save, and then update the home email, save, and then update the work email, the CardDAV client upload synchronization contains the following UIDs:

- Create a new contact with home and work emails: UID:f311065b-0c76-437e-9bc6-2637449c590a
- Update the home email on the original contact: UID:f311065b-0c76-437e-9bc6-2637449c590a.vcf
- Update the work email on the original contact: UID:f311065b-0c76-437e-9bc6-2637449c590a.vcf.vcf

On the server, there are 3 contacts and each contact has a different email. On the client, there are 3 contacts and two of the contacts are identical.