Siebel

Mobile Guide: Connected

July 2021

Siebel
Mobile Guide: Connected

July 2021

Part Number: F12756-07

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

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For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

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1 What's New in This Release

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

The following information 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

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Setting the Server Uncompression Location *Prerequisites to Viewing Presentation Informationfor a Call*	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 As of Siebel CRM 21.2 Update, the **`applicationcontainer`** directory has been replaced by two directories, as follows: • **`applicationcontainer_external`** (for Siebel Application Interface) • **`applicationcontainer_internal`** (for all other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 **`applicationcontainer_external\siebelwebroot`**. This directory contains subdirectories such as **`files`**, **`fonts`**, **`htmltemplates`**, **`images`**, **`migration`**, **`scripts`**, and **`smc`**. For more information, see *Siebel Installation Guide* .
About the Siebel App, Siebel.maa File, and Mobile Application Framework	Modified topic. Mobile Application Framework (MAF) has been upgraded.

What's New in Siebel Mobile Guide: Connected, Siebel CRM 20.12 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Siebel Mobile Products	Modified topic. You typically access Siebel Mobile applications from a Siebel app downloaded from the Apple App Store or Google Play. In the case of Siebel Mobile connected applications only, you can also access them from the browser on a mobile (iOS or Android) device, where the browser is connected to a Siebel Server. Siebel Mobile disconnected applications are not supported on client browsers.
About Siebel Mobile *Adding Object Managers for Siebel Mobile* *Setting Siebel Application Object Manager Parameters for Siebel Mobile* *Enabling the Component Groups for Siebel Mobile* *Assigning Responsibilities to Siebel Mobile Users*	Modified topics. There is a Siebel Mobile application for Siebel Clinical, eClinicalM, which is supported in online (connected) and offline (disconnected) mode.
Logging In to Siebel Mobile	Modified topic. Describes how to log in to Siebel Mobile connected applications.
Navigating Siebel Mobile in Landscape Mode *Navigating Siebel Mobile in Portrait Mode*	Modified topics. Describes how to navigate Siebel Mobile after you log in to it on your mobile device.
Smartphone UX for Siebel Mobile *Configuring Application Behavior Settings for Siebel Mobile*	Modified topic. *Redwood* is the default Smartphone UX PHONE theme for Siebel mobile applications.
About the Siebel App, Siebel.maa File, and Mobile Application Framework	Modified topic. Upgrade to the latest Mobile Application Framework (MAF) version to use the Siebel app and Siebel.maa file. Xcode 12.x is required to generate the ipa file, Android 10.0 (API 29) is required to generate the apk file, and the development environment requires JDeveloper 12.2.1 or later.

What's New in Siebel Mobile Guide: Connected, Siebel CRM 20.9 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Smartphone UX for Siebel Mobile	New topic. Describes the enhanced Smartphone UX for smartphone devices (iOS and Android) which is available for Siebel Mobile applications as of Siebel CRM 20.9 Update.

What's New in Siebel Mobile Guide: Connected, Siebel CRM 20.4 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes as follows:

- The Oracle Policy Automation (OPA) product has been rebranded to Intelligent Advisor.

  Note: Where *OPA* exists in the technical name of a workflow, parameter, business service, view, or object, the name remains as it is — that is, no rebranding has occurred for OPA in these instances.

- Rulebase has been renamed to Policy Model.

  Note: Where *rulebase/rule base* exists in the technical name of a business component user property, the name remains as it is — that is, no renaming has occurred for Rule Base in these instances.

What's New in Siebel Mobile Guide: Connected, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Overview

Overview of Siebel Mobile

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

- *Siebel Mobile Products*
- *About Siebel Mobile*
- *Requirements for Using Siebel Mobile*
- *System Requirements for Siebel Mobile*
- *MIT License*

Siebel Mobile Products

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

- **Siebel Mobile Connected Applications.** Siebel Business Applications accessed from a Siebel app downloaded from the Apple App Store or Google Play, or from the browser on a mobile (iOS or Android) device where the browser is connected to a Siebel Server. This offering from Oracle provides access to Siebel Business Applications, with its native look-and-feel, from tablets and smartphones.
- **Siebel Mobile Disconnected Applications.** 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.

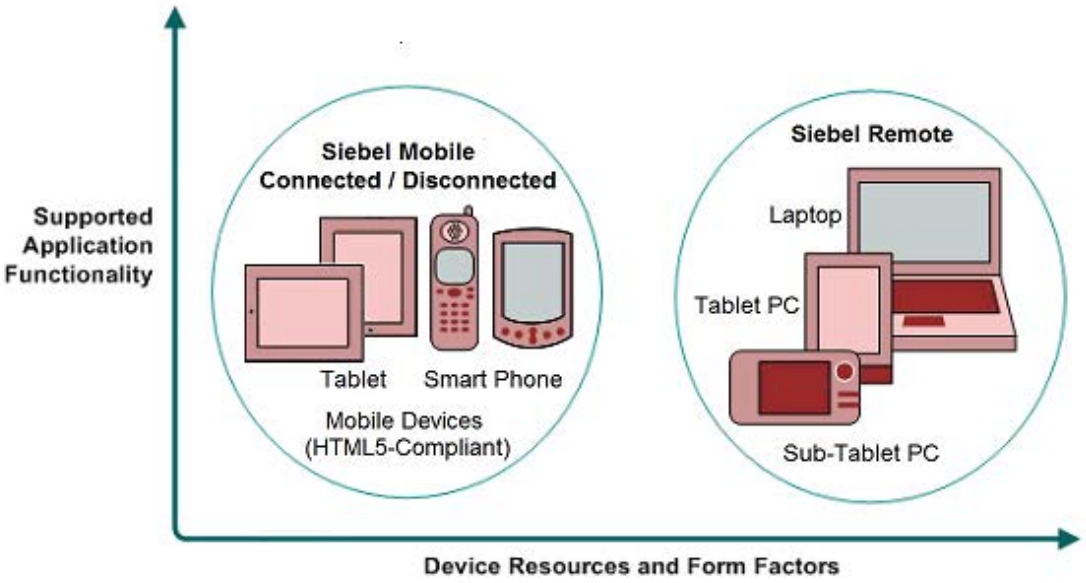
  > **Note:** Siebel Mobile disconnected applications are not supported on client browsers.

- **Siebel Mobile Web Client and Siebel Remote.** A disconnected client and supporting data synchronized to the client without connection to the network. These applications provide intelligent transaction routing and data synchronization. Siebel Remote works only on Microsoft Windows-based desktops, laptops, and tablets.

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

The following image illustrates the hardware platforms on which 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 iPhone) and Android (Samsung Galaxy tablet or smartphone) devices.
- Siebel Remote applications are supported on laptop, tablet PC, and sub-tablet PC.



The following table describes the software components of Siebel Mobile, and the supported hardware devices.

Product Group	Server Components	Client Component	Supported Client Devices
Siebel Mobile Connected	Siebel Mobile application in online mode (connected to Siebel Server).	Siebel app or client browser.	An iOS or Android mobile device. For information about Certifications, see Article ID 1492194.1 on My Oracle Support.
Siebel Mobile Disconnected	Siebel Mobile application in offline mode (disconnected from Siebel Server). Synchronization Object Manager	Siebel app	An iOS or Android mobile device. For information about Certifications, see Article ID 1492194.1 on My Oracle Support.
Siebel Remote	Siebel Remote component group Disconnected Mobile Synchronization component group	Siebel Mobile Web Client Note that Siebel Mobile Connected and Siebel Mobile Disconnected are not related to the Siebel Mobile Web Client in any way.	Desktop PCs Laptops Tablets

The following table describes the supported applications of Siebel Mobile, and where to go for more information about these applications.

Product Group	Supported Applications	Related Documentation
Siebel Mobile Connected	Siebel supports Responsive Web Design, so any Siebel desktop application will work from any device. For example, the following Siebel Mobile connected applications are supported: • Siebel Pharma • Siebel Consumer Goods • Siebel Sales • Siebel Field Service • Siebel Finance • Siebel Clinical	If using Siebel Mobile in online mode only, then see the following: • Siebel Mobile Guide: Connected • *Configuring Siebel Open UI* • *Siebel Installation Guide*
Siebel Mobile Disconnected	The following Siebel Mobile disconnected applications are supported: • Siebel Field Service • Siebel Sales • Siebel Clinical • Siebel Pharma	If using Siebel Mobile in both online and offline mode, then see the following: • *Siebel Mobile Guide: Disconnected* • *Configuring Siebel Open UI* • *Siebel Installation Guide*
Siebel Remote	Almost all Siebel Business Applications and Siebel Industry Applications (Provides the same look-and-feel as those applications.)	*Siebel Remote and Replication Manager Administration Guide*

About Siebel Mobile

Siebel Mobile enables you to access Siebel CRM information with your mobile device in real time by permitting you to access an app-based or browser-based (connected applications only) version of one of the following Siebel Business Applications on your mobile device: Siebel Pharma, Siebel Consumer Goods, Siebel Sales, Siebel Field Service, Siebel Finance, Siebel Clinical.

Siebel Mobile Products lists the applications that are supported in connected (online) mode and disconnected (offline) mode. For more information about Siebel Mobile connected applications, see the remainder of this guide. For more information about Siebel Mobile disconnected applications, see *Siebel Mobile Guide: Disconnected* .

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

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

- **Usability.** Siebel Mobile is designed for field sales and service users and are optimized to support frequent tasks in the sales and service cycle.

- **Productivity.** Siebel Mobile maximizes productivity by enabling you to find the relevant information easily and to complete important activities quickly.
- **Collaboration.** Siebel Mobile enables you to pass contact information to other contacts, employees, or account team members. When travelling, you can schedule meetings and calls with contacts, employees, account team members, and even account customers.

Requirements for Using Siebel Mobile

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

- You must have an iOS or Android mobile device with an internet connection.
- The browser on your mobile device must support the following: HTML5 and CSS 3.0 or higher.
- You have downloaded the Siebel app from the Apple App Store or Google Play, or the archive (Siebel.maa) file from Oracle Support.
- You have reviewed the topics about Siebel and Siebel Mobile in the applicable *Siebel Installation Guide* .

System Requirements for Siebel Mobile

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

- Apple iOS devices: iPad tablet and iPhone smartphone.
- Android devices: Samsung Galaxy tablet and smartphone.

Oracle supports the devices on which Siebel Mobile runs but does not certify any specific device models.

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

MIT License

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

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

- *Printing Invoices Associated with Activities*
- *Printing Invoices Associated with Service Requests*
- *Printing Invoices*

3 Setup

Setting Up Siebel Mobile

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

- *Process of Setting Up Siebel Mobile Connected Applications*
- *Requirements for Setting Up Siebel Mobile*
- *Adding Object Managers for Siebel Mobile*
- *Setting Siebel Application Object Manager Parameters for Siebel Mobile*
- *Enabling the Component Groups for Siebel Mobile*
- *Assigning Responsibilities to Siebel Mobile Users*
- *Customizing Siebel Mobile Applications*
- *Copying and Deleting Siebel Mobile Applications*
- *Troubleshooting Siebel Mobile Applications*

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

Process of Setting Up Siebel Mobile Connected Applications

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

1. Review *Requirements for Setting Up Siebel Mobile*
2. *Adding Object Managers for Siebel Mobile*
3. *Setting Siebel Application Object Manager Parameters for Siebel Mobile*
4. *Enabling the Component Groups for Siebel Mobile*
5. *Assigning Responsibilities to Siebel Mobile Users*
6. *Customizing Siebel Mobile Applications*

Requirements for Setting Up Siebel Mobile

This task is a step in *Process of Setting Up Siebel Mobile Connected Applications*.

Before starting to set up Siebel Mobile, you must meet the following requirements:

1. The installed software for Siebel Mobile is Siebel CRM 17.x 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 *Siebel Installation Guide* .

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

   For more information about using Siebel Incremental Repository Merge, see *Siebel Database Upgrade Guide* .

   For new installations, running Siebel Incremental Repository Merge is not required. Install a new Siebel database for Siebel CRM.
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 are 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 are 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 Technology Network (http://www.oracle.com/technetwork/indexes/documentation/index.html) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Adding Object Managers for Siebel Mobile

This task is a step in *Process of Setting Up Siebel Mobile Connected Applications* and is required under the following conditions:

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

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

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

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

To add object managers for Siebel Mobile

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

   For instructions on how to do this type of backup, see *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 the following table, as required:

Operating System	Command
Microsoft Windows	Run the following command on Windows:

Operating System	Command
	`new_compdef_sia.bat <GATEWAY>:<PORT> <ENTERPRISE> <USERNAME> <PASSWORD> <LANG>`
Linux or UNIX	Run the following command on Linux or UNIX: `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 *Enabling the Component Groups for Siebel Mobile*.

Related Topic

Setting Siebel Application Object Manager Parameters for Siebel Mobile

Setting Siebel Application Object Manager Parameters for Siebel Mobile

This task is a step in *Process of Setting Up Siebel Mobile Connected Applications*.

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

The Siebel Application Object Manager parameters settings shown in the following table are set by default and are required for all Siebel Mobile connected applications.

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

Enabling the Component Groups for Siebel Mobile

This task is a step in *Process of Setting Up Siebel Mobile Connected Applications*.

The component groups for Siebel Mobile must be enabled on the supported Siebel Server. You can enable the component groups for the following Siebel Mobile applications on Microsoft Windows or on UNIX:

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

To enable the component groups for Siebel Mobile applications

1. Log 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.

      The following component groups are returned:

      - HandheldSync
      - HandheldSyncSIS

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

Assigning Responsibilities to Sieble Mobile Users

This task is a step in *Process of Setting Up Siebel Mobile Connected Applications*.

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

To assign responsibilities to Siebel Mobile application users

1. Log in to the Siebel application as a user with administrator privileges.
2. Navigate to the Administration - Application screen, then the Responsibilities view.

3. Query for and select the appropriate responsibility or user role.

   For example, query for the following: PH Pharma Sales Rep - US Sales.
4. Select the Responsibilities tab, and then do the following:

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

The following table lists the application views that are added by default as part of the seed data for Siebel Mobile application for Siebel Pharma, so it is not necessary to manually add the views again.

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

Application	Default Views
	Pharma Contact Attachments View - Mobile

The following table lists the application views that are added by default as part of the seed data for Siebel Mobile application for Siebel Consumer Goods, so it is not necessary to manually add the views again.

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

The following table lists the application views that are added by default as part of the seed data for Siebel Mobile application for Siebel Sales, so it is not necessary to manually add the views again.

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

The following table lists the application views that are added by default as part of the seed data for Siebel Mobile application for Siebel Field Service, so it is not necessary to manually add the views again.

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

Application	Default Views
	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

The following table lists the application views that are added by default as part of the seed data for Siebel Mobile application for Siebel Finance, so it is not necessary to manually add the views again.

Application	Default Views
Siebel Mobile application for Siebel Finance	FINS Account List View - Mobile FINS Account Contacts View - Mobile FINS Account Opportunity View - Mobile FINS Account Address View - Mobile FINS Account Activities View - Mobile FINS Account Team View - Mobile FINS Company Financial Accounts View - Mobile FINS Contact List View - Mobile FINS Contact Opportunities View - Mobile FINS Contact Team View - Mobile FINS Contact Address View - Mobile FINS Contact Financial Accounts View - Mobile FINS Contact Notes View - Mobile FINS Contact Activity View - Mobile FINS My Application View - Mobile FINS Application View - Mobile FINS New Opportunities List View - Mobile SHCE Opportunities List View - Mobile SHCE Sales Opportunities Contacts View - Mobile SHCE Sales Opportunities Products View - Mobile

Application	Default Views
	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 SHCE Service SR Invoices View - Mobile UInbox My Inbox Item List View

The following table lists the application views that are added by default as part of the seed data for Siebel Mobile application for Siebel Clinical, so it is not necessary to manually add the views again.

Application	Default Views
Siebel Mobile application for Siebel Clinical	LS Clinical My Site Visits View - Mobile LS Clinical Protocol Site List View - Mobile

Customizing 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 particulabusiness needs. You can customize the look-and-feel of your mobile application by modifying the JavaScript files. You can also deploy your own presentation models and physical renderers that might or might not use one or more third-party JavaScript plug-ins of your choice.

The following customizations are recommended:

- Set up the jQuery grid (jqGrid) renderer so that the mobile application data displays in grid (tabular) format.
- Set up landscape and portrait layout for mobile applications so that the views are visible on tablets.
- Set up infinite scroll for mobile applications, which is a feature that allows you to scroll through records in a list applet indefinitely.
- Set up Location Services so that when you tap the 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* .

Related Topics

Inline Editing

Check Boxes

Data Display

Displaying Location Details in Siebel Mobile

Configuring Application Settings for Siebel Mobile

Copying and Deleting Siebel Mobile Applications

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

- When you copy a mobile application, the application plus all the associated child business component records are copied.

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

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* .

To copy and delete mobile applications in Siebel CRM

1. Log in to the Siebel Server using a user ID with a Siebel administrator responsibility.
2. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.
3. Create a copy of an existing mobile application as follows:
   a. Select an application from the 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 do not 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.

Troubleshooting Siebel Mobile Applications

This section highlights some important common errors that users might encounter when trying to access and use Siebel Mobile connected applications on their mobile device.

Common Erors

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	The application user interface is not displaying correctly on the mobile device.
Cause	The mobile application is not rendering correctly.
Solution	Check the browser that is being used on your mobile device. For information about browser requirements, see *Deploying Siebel Open UI* .

Error 2

Item	Description
Problem	The Siebel Mobile environment is not loading and a blank screen appears.
Cause	Private browsing is enabled for the browser on your mobile device.
Solution	Make sure that private browsing is not enabled for the browser on your mobile device. For more information, see *Disabling Private Browsing*.

Error 3

Item	Description

Problem	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 *Setting Siebel Application Object Manager Parameters for Siebel Mobile*.

Error 4

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: • Log in to the Siebel Business Application. • Navigate to the Administration - Web Browser screen, then the Browsers view. • Create a new browser by entering the browser name and version. • 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 that although the User-Agent value looks incomplete without a closing parenthesis, this is the correct value. • After applying these Siebel client parameters, restart the Siebel Mobile application. No browser errors will be returned, no matter what parameters are set on the browser side.

Enabling JavaScript for Safari

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

To enable JavaScript for Safari

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

Disabling Private Browsing

If after logging into Siebel Mobile, the application environment will not load and a blank screen appears, then make sure that private browsing is not enabled for the browser on your mobile device. Private browsing mode will block any browser cache from registering, and prevent Siebel Mobile, which depends on caching, from running. The following procedure shows you how to disable private browsing in, for example, Safari on iPad.

To disable private browsing (for example, on iPad)

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

      Private browsing is now disabled for the mobile device, and the background color of the Safari browser changes by getting brighter (daylight mode). To enable private browsing for the mobile device, repeat this step again. When private browsing is enabled, the background color of the Safari browser changes by getting darker (night mode).
   b. If using Apple iOS 7.1 or later, then disable private browsing as follows:
      - Tap the URL field on-screen.
      - When the keyboard opens, tap Private (over the keyboard).
      - If prompted to close or keep all current tabs open, select an option.

      Private browsing is now disabled for the mobile device, and the background color of the Safari browser changes by getting brighter (daylight mode). To enable private browsing for the mobile device, repeat this step again. When private browsing is enabled, the background color of the Safari browser changes by getting darker (night mode).

Clearing the Browser Cache

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

To clear the browser cache

1. On an iOS device (such as iPad):
   a. Tap Settings, Safari, and then tap Clear Cookies and Data.
   b. Tap Clear when prompted for confirmation to clear all cookies and data.

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

c. Refresh the page that you are viewing to obtain the latest files.

4 Getting Started

Getting Started with Siebel Mobile Applications

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 the following topics:

- *Logging In to Siebel Mobile*
- *Logging Out of Siebel Mobile*
- *Navigating the Siebel Mobile User Interface*
- *Managing Records in Siebel Mobile*
- *Reviewing Notification Messages in Siebel Mobile*
- *Configuring Application Settings for Siebel Mobile*
- *Displaying Location Details in Siebel Mobile*
- *Running Predefined Queries in Siebel Mobile*
- *Scanning Barcodes in Siebel Mobile*
- *Using Attachments in Siebel Mobile*
- *Starting an External Application from Siebel Mobile*
- *Printing from Siebel Mobile*

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

- *Siebel Life Sciences Guide*
- *Siebel Consumer Goods Guide*
- *Siebel Applications Administration Guide*
- *Siebel Order Management Guide*
- *Siebel Marketing User Guide*
- *Siebel Finance Guide*
- *Siebel Clinical Trial Management System Guide*

Logging 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. In the case of Siebel Mobile connected applications only, you can also access them from the browser on a mobile (iOS or Android) device.

Logging in to Siebel Mobile Using the Siebel App

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

- You have downloaded and installed the Siebel App
- You have set up the host server for Siebel Mobile
- You have configured the Siebel App on your mobile device

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

To log in to Siebel Mobile using the Siebel app

1. Start your iOS or Android device and then tap Siebel to start the Siebel app.
2. Tap the arrow next to the host server address to go to the Home page (Application List screen) of the Siebel app.

   The Application List screen lists the applications that you can connect to on the host server. You can connect to multiple applications using Siebel app.
3. Connect to an application as follows:
   a. Tap the Edit button next to the application that you want to connect to.
   b. Type in the Username and Password credentials for the application, and then tap Sign In.

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

      - **Refresh button** for refreshing the page in the browser.
      - **Attachment button** for going to the Attachment Manager view. For more information, see *Managing Attachment Downloads*.
      - **Home button** for returning to the Home page (Application List screen) of the Siebel app.

> **Note:** The Identifier does not apply to Siebel Mobile connected applications.

Logging in to Siebel Mobile Using the Browser

You can also access Siebel Mobile connected applications from the browser on a mobile device when the browser is connected to a Siebel Server. The following procedure describes how to log in to Siebel Mobile connected applications on a mobile (iOS or Android) device using the browser.

To log in to Siebel Mobile using the browser

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

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

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

   ```
   http://www.localhost.com/epharmam/enu
   http://www.localhost.com/cgm/enu
   ```

```
http://www.localhost.com/salesm/enu
http://www.localhost.com/servicem/enu
http://www.localhost.com/finsm/enu
http://www.localhost.com/eclinicalm/enu
```

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

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

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

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

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

   When you log in to a connected application, you are connected to a unique mobile-enabled Siebel Application Object Manager for the Siebel application, and you are connected to the Siebel Server by default.
6. If this is your first time logging in to the application, then accept the Siebel Mobile End User License Agreement when prompted; otherwise, you will not be able to continue.

Logging Out of Siebel Mobile

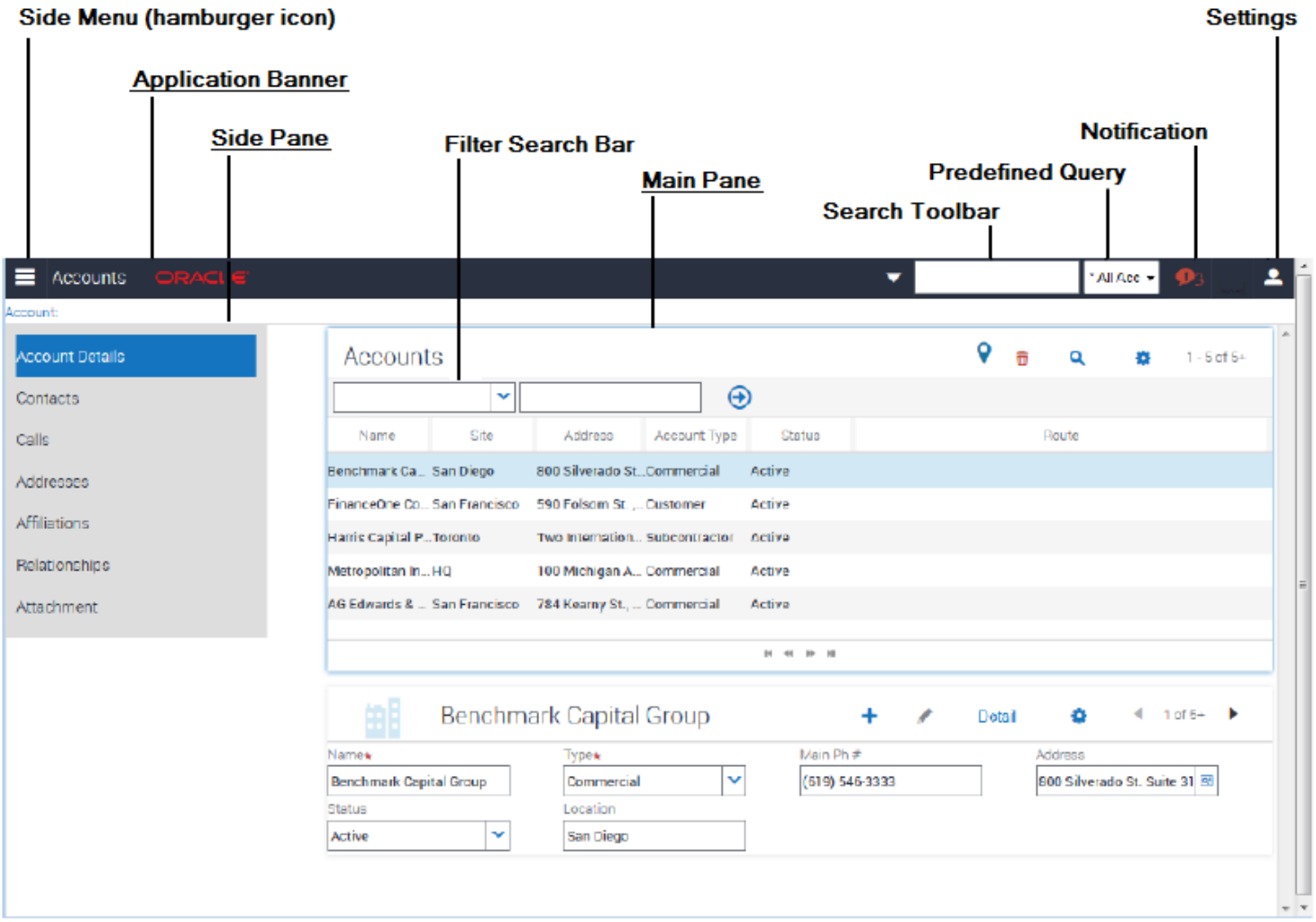
This topic describes how to log out of Siebel Mobile on your mobile device.

To log out of Siebel Mobile

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

Navigating the Siebel Mobile User Interface

The application user interface for Siebel Mobile is divided into three areas: side pane, main pane, and application banner. These areas are shown in the following image.



Side Pane

The side pane appears to the side of the UI and typically displays the related item information according to the object that is 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.

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.

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 *Searching 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 *Running Predefined Queries in Siebel Mobile*.
- **Notification (the exclamation mark icon).** Tap to display notification messages. For more information, see *Reviewing Notification Messages in Siebel Mobile*.
- **Settings (the photo icon).** Tap to configure the behavior of and notification settings for Siebel Mobile applications, or to log out of Siebel Mobile applications. For more information, see *Configuring Application Settings for Siebel Mobile*.

Application	Siebel Objects
Siebel Mobile application for Siebel Pharma	The following Siebel objects are typically available from the Side Menu on the application banner: Calls, Accounts, and Contacts. For more information, see *Using the Siebel Mobile Application for Siebel Pharma*.
Siebel Mobile application for Siebel Consumer Goods	The following Siebel objects are typically available from the Side Menu on the application banner: Calls, Contacts, Accounts, Routes, Orders, and Returns. For more information, see *Using the Siebel Mobile Application for Siebel Consumer Goods*.
Siebel Mobile application for Siebel Sales	The following Siebel objects are typically available from the Side Menu on the application banner: Accounts, Contacts, Leads, Opportunities, Quotes, Orders, and Activities. For more information, see *Using the Siebel Mobile Application for Siebel Sales*.
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. For more information, see *Using the Siebel Mobile Application for Siebel Field Service*.
Siebel Mobile application for Siebel Finance	The following Siebel objects are typically available from the Side Menu on the application banner: Accounts, Contacts, Opportunities, Households, Financial Accounts, Activities, and Service Requests. For more information, see *Using the Siebel Mobile Application for Siebel Finance*.
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 *Configuring the Siebel App on iOS and Android Devices*.

Navigating Siebel Mobile in Landscape Mode

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

To navigate Siebel Mobile in landscape mode

1. Log in to Siebel Mobile on your mobile device - see *Logging In to Siebel Mobile*.

   After you log in to Siebel Mobile, the following interface elements are present 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 is 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 choose another Siebel object.
3. To search for records in Siebel Mobile, see *Searching for Records in Siebel Mobile*.
4. To create, modify, or delete records in Siebel Mobile, see *Managing Records in Siebel Mobile*.
5. To log out of Siebel Mobile, see *Logging Out of Siebel Mobile*.

Navigating Siebel Mobile in Portrait Mode

You navigate Siebel Mobile in portrait mode in much the same way as in landscape mode, except for one difference. The home page displays only the application banner and the work area by default. That is, there is only one pane in portrait mode. The following procedure shows you how to navigate Siebel Mobile in portrait mode. This procedure assumes that your mobile device is in portrait mode.

To navigate Siebel Mobile in portrait mode

1. Log in to Siebel Mobile on your mobile device - see *Logging In to Siebel Mobile*.

   After you log in to Siebel Mobile, the following interface elements are present 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 choose another Siebel object.
3. To search for records in Siebel Mobile, see *Searching for Records in Siebel Mobile*.
4. To create, modify, or delete records in Siebel Mobile, see *Managing Records in Siebel Mobile*.
5. To log out of Siebel Mobile, see *Logging Out of Siebel Mobile*.

About the Siebel Mobile Aurora and Zante UI Themes

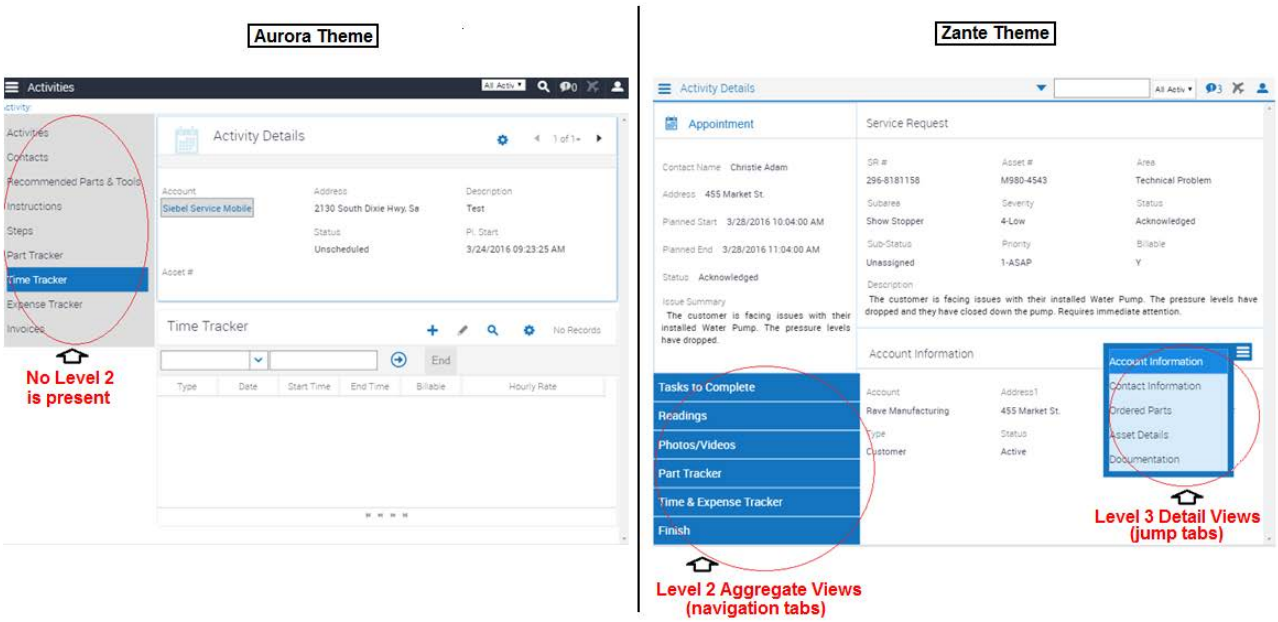
The Siebel Mobile applications for Siebel Field Service and Siebel Consumer Goods use the Zante UI theme by default, which is different from the Aurora UI theme which is the default theme used by other Siebel Mobile applications (such as Siebel Pharma, Siebel Sales, and Siebel Finance).

- For information about navigating Siebel Mobile applications using the Aurora theme, see *Using the Home Page for Siebel Pharma*.
- For information about navigating Siebel Mobile applications using the Zante theme, see *Using the Home Page for Siebel Field Service*.
- For information about how to change the UI theme for your Siebel Mobile application, see *Configuring Application Behavior Settings 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 *Configuring Second Level Navigation Views*.



Configuring Second Level Navigation Views

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

To configure second level navigation views for your application

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.
   - Do not 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.

Selecting Fields, Drop-Down Lists, and Records

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

- Tap an editable field in the application to automatically display one of the following, according to the field type: drop-down list, text box, or date selector.

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

  Tap once to select an option. Tap the same option again to deselect the option.
- Tap a record to open and display the record details.
- Tap a related item belonging to a record to open the related item.
- Close a dialog box by tapping anywhere outside the dialog box.
- Double-tapping is supported in Siebel Mobile.

  For example, you can close a dialog box by double-tapping the selected entry in the dialog box.

Inline Editing

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

- Edit fields directly on Form (detail) and List applets without opening the Edit page for the record.

- Edit fields in tables, windows and dialog boxes, and in many linked records on main record Form (detail) applets.

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

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

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

Check Boxes

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

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

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

Data Display

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

Smartphone UX for Siebel Mobile

As of Siebel CRM 20.9 Update, an enhanced Smartphone UX for smartphone devices (iOS and Android) is available for Siebel Mobile applications.

Siebel Open UI provides a specialized PHONE theme for smartphone devices where list applets are transformed to Tile visualization mode with infinite scrolling navigation and navigation defaults to Side Menu mode. The enhanced UX for smartphone devices also employs some specialized out-of-the-box context renderers to optimize the layout (of mobile applications) on client devices to ensure the optimal usage of available real estate.

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

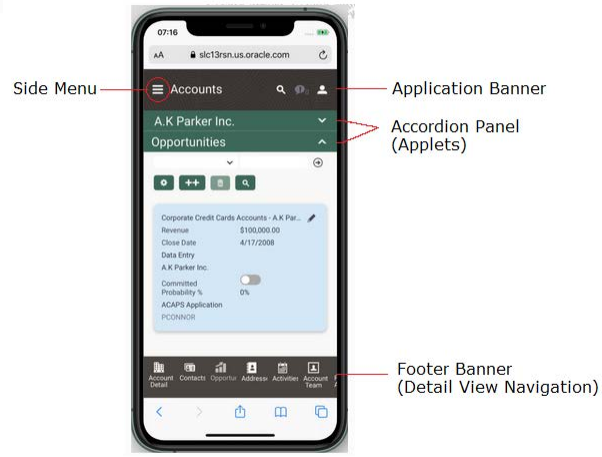
```
// change param AutoTileType=PHONE for comp <application_object_manager>_<language>
change param AutoTileType=PHONE for comp ServiceMObjMgr_Enu
```

You must restart the component after modifying the AutoTileType component parameter for the changes to take effect on smartphone devices. Modifying the AutoTileType component parameter will not change the look and feel of the application on desktop or tablet devices.

The Smartphone UX PHONE theme for Siebel mobile applications contains the following elements, shown in the following image, and these elements persist for all views:

- **Application banner.** This appears across the start of each page in the Smartphone UX PHONE theme and contains the following options: Side Menu, Search, Settings.
- **Accordion panel.** This displays context information according to the selection that you make from the Side Menu and the information is displayed in accordion format. In the example shown in the following image, the accordion panel contains the following applets: Account record (for A.K. Parker Inc.) and Opportunities. You expand (or close) each applet in the accordion panel to view more (or less) information on your smartphone.
- **Footer banner.** This displays the *detail view navigation options* according to the selection that you make from the Side Menu. In the example shown in the following image, Accounts is selected from the Side Menu and the footer banner contains the following detail view navigation options: Account Detail, Contacts, Opportunities, Address, Activities, and Account Team. Click Address, for example, to navigate to the address information for the selected account (A.K. Parker Inc. in this example).

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



The Smartphone UX feature is supported by the following Siebel Mobile applications:

- Siebel Mobile application for Siebel Consumer Goods
- Siebel Mobile application for Siebel Sales
- Siebel Mobile application for Siebel Field Service
- Siebel Mobile application for Siebel Finance
- Siebel Mobile application for Siebel eClinical

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

Managing Records in Siebel Mobile

This topic contains the following information:

- *Creating Records in Siebel Mobile*
- *Linking Records to Your Selected Record*
- *Searching for Records in Siebel Mobile*

- *Modifying Records in Siebel Mobile*
- *Deleting Records in Siebel Mobile*
- *About Menu (the Cogwheel Icon) in Siebel Mobile*
- *Reviewing Record Summary Information*
- *Displaying the Total Number of Records*
- *Creating Bookmarks in Siebel Mobile*
- *Formatting the Columns to Display in the List View*
- *Configuring the Number of Records Displayed on Mobile Devices*

Creating 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 Siebel Mobile.

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

- You can type information directly into some fields, or select values from a drop-down list.
- When you tap some fields, another dialog box appears from which you can select values or type values.
- For some fields that already have a value, you can tap an icon 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 *Displaying Location Details in Siebel Mobile*.
- 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.

Linking Records to Your Selected Record

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

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

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

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

Searching for Records in Siebel Mobile

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

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

You perform searches 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 *Siebel Fundamentals Guide* . For more information about configuring Siebel search controls, see *Siebel Search Administration Guide* .

Modifying Records in Siebel Mobile

Use the following procedure to modify records in Siebel Mobile.

To modify records

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

Deleting Records in Siebel Mobile

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

To delete records

1. Navigate to and select the record that you want to delete.
2. Tap Delete (the trash can icon) and then tap 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 tap Delete.

About Menu (the Cogwheel Icon) 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 Menu as required by using Siebel Tools:

- **About Record.** See *Reviewing Record Summary Information*.
- **Record Count.** See *Displaying the Total Number of Records*.
- **Create Bookmark.** See *Creating Bookmarks in Siebel Mobile*.
- **Columns Displayed.** See *Formatting the Columns to Display in the List View*.

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

Reviewing Record Summary Information

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

To review record summary information in Siebel Mobile

1. Navigate to and select the record whose summary information you want to review.
2. Tap 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. Tap OK to close the record summary information.

Displaying the Total Number of Records

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

To display the total number of records in a parent object

1. Navigate to the parent object view that you want by doing one of the following:

   - Tap Side Menu and then select an object from the drop-down list.
   - Tap Side Menu, select an object from the drop-down list, and then a related item from the side pane.
2. Tap Menu (the cogwheel icon) in the work area and then select Record Count.

   The total number of records in the parent object is returned.

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 check box, if selected, indicates that the organization represents an external enterprise which is a partner of your company. **Note:** Partners are registered and promoted to organizations using the Approved Partners view in the Administration - Partner screen, as described in *Developing and Deploying Siebel Business Applications* .

3. Tap OK to close the record count information.

Creating Bookmarks in Siebel Mobile

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

To create bookmarks in Siebel Mobile

1. From any page or view within Siebel Mobile, tap 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. Tap OK to close the dialog box.

Formatting the Columns to Display in the List View

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

To format the columns to display in the list view

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

Configuring the Number of Records Displayed on Mobile Devices

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

- **HTML Number of Rows (applet parameter).** Specifies the number of rows that Siebel CRM displays in the user interface for a particular list applet. If this parameter is not set (or is empty), then Siebel CRM uses the value specified in the NumberOfListRows parameter in the application configuration file to determine the number of rows to display in the UI. For more information about the HTML Number Of Rows applet parameter, see the topic about Applet in Siebel Object Types Reference.
- **NumberOfListRows (application parameter).** Specifies the default number or records or rows to display per page on mobile devices. This parameter applies or is used only when a given applet's HTML Number of Rows parameter is not set. For more information about 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 does not have to go to the server every time a small scroll occurs. If neither parameter is set, for example, then a mobile device would display 10 records by default in the UI but fetch 30 records (and only 10 records would be visible in the UI at any one time).

To 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 for which you want to configure the number of records displayed on each page, or if there is not entry, create one by selecting New Record from the drop-down list.
3. With the browser selected, click the Capabilities list.
4. If the NumberOfListRows appears in the list, then select it, click Edit, set the Capability Value to <the number of records to display per page >, and then save the record.
5. If the NumberOfListRows does not appear in the list, then click 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 do the following:

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

   b. If the NumberOfListRows does not appear in the list, then do the following:

      - Click New.
      - Set the Capability Name to NumberOfListRows.
      - Set the Capability Value to <the number of records to display per page>.

- Save the record.

Reviewing Notification Messages in Siebel Mobile

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

You review notification messages in Siebel Mobile by tapping Notification (the exclamation mark icon) on the application banner. For more information about the application banner, see *Navigating the Siebel Mobile User Interface*. 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 is 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 does not blink if there are messages waiting to be read with only a Normal, High, or Urgent severity.
- If there is 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 *Siebel Fundamentals* . See also *Configuring Notification Settings for Siebel Mobile*.

Configuring Application Settings for Siebel Mobile

You use Settings (the photo icon) on the application banner to configure the application settings for Siebel Mobile. When you tap Settings on the application banner, the following information appears:

- The logged in user's photo, provided one is uploaded to the user's profile on Siebel Server. Otherwise, a default generic photo appears. For more information, see *Uploading a User Profile Image to Siebel Server*.
- The logged in user's name and email address.
- The following options: Settings and Logout.
  - **Settings.** Has the following suboptions: Behavior and Notifications.

    Behavior. See *Configuring Application Behavior Settings for Siebel Mobile*.

    Notifications. See *Configuring Notification Settings for Siebel Mobile*.
  - **Log Out.** See *Logging Out of Siebel Mobile*.

Uploading a User Profile Image to Siebel Server

You can set a user profile image for your application, which 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 Siebel Mobile applications.

For more information about uploading a user profile image to Siebel Server, see the topic about setting a user profile image in *Siebel Online Help*.

Configuring Application Behavior Settings for Siebel Mobile

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

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

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

To configure the application behavior settings for Siebel Mobile

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

Field	Description
Startup View	The name of the view to display when the application starts. Tap Startup View, and select a view from the drop-down list.
Navigation Control	Specifies the navigation control to use in the mobile application. Tap Navigation Control, and select one of the following options as required: o **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. o **Tab.** Indicates to use the tab navigation control in the application where all Siebel objects appear in tab format in the UI. o **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. Tap Theme, and select a theme from the drop-down list. Available themes include the following: o **Aurora.** This theme is used by default in the Siebel Mobile applications for Siebel Pharma, Siebel Sales, and Siebel Finance. o **Zante.** This theme is used by default in the Siebel Mobile applications for Siebel Field Service and Siebel Consumer Goods.

Field	Description
	○ **Synergy.** This theme is available only in the Siebel Mobile applications for Siebel Pharma, Siebel Sales, and Siebel Finance. ○ **Vanilla.** This theme is available only in the Siebel Mobile applications for Siebel Pharma, Siebel Sales, and Siebel Finance. ○ **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. Tap 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 or not 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. Tap the Confirm Before Deleting Record option so that a check mark icon or On appears. Tap the option again so that X or Off appears.

3. Save the changes when finished.

Configuring Notification Settings for Siebel Mobile

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

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

To configure notification settings for Siebel Mobile

1. Tap Settings (the photo icon) on the application banner, and then select the Settings option.
2. Tap 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 have 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 have difficulty distinguishing the colors of the messages.	H
Prefix of Urgent Priority Message	Type the text to appear before an urgent-priority message. This aids accessibility. For example, a letter is useful if you have difficulty distinguishing the colors of the messages.	U

3. Save the changes when finished.

Displaying Location Details in Siebel Mobile

Global Positioning System (GPS) is integrated with Siebel Mobile so that when you tap the Route button (the pin icon), shown in the following image, a map window opens showing the location details. Mapping is configured by default for some list and form applets in Siebel Mobile, but you can set up mapping for any other Siebel Mobile applet as required by configuring the 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 cannot see Route button or if you can see it but it is disabled, then the map functionality is not enabled for the mobile application.

Information about the following is included in this topic:

- *Enabling the Map Functionality for Siebel Mobile*
- *Displaying Route Details Using the Route Button*

Enabling the Map Functionality for Siebel Mobile

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

To enable the map functionality for Siebel Mobile

1. Enable location services on your mobile device (iPad) as follows:
   a. Start your iPad.
   b. Go to Settings, Privacy, Location Services, and then turn on Location Services.

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

Displaying Route Details Using the Route Button

The following procedure shows you how to 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. This procedure assumes that the map functionality is enabled for Siebel Mobile as shown in *Enabling the Map Functionality for Siebel Mobile* .

To display route details using the Route button

1. Navigate to and open a call or an account in your mobile application.

   All details for the selected call or account appear in the work area.
2. Tap 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 is not found for a given address, then an error message appears in the map window.

Running Predefined Queries in Siebel Mobile

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

To run a predefined query in Siebel Mobile

1. Tap 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 *Navigating the Siebel Mobile User Interface*.

   Scroll up and down the predefined query list that opens to find the query that you want to run.
3. Tap a predefined query in the list.

   This step runs the predefined query, returning the appropriate data in the list view.

4. Tap PDQ on the application banner again to close the predefined query.

Scanning Barcodes in Siebel Mobile

Barcode scanning is supported by default for activity parts in the Siebel Mobile application for Siebel 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 allows you to scan barcodes for parts using a barcode reader. For more information, see *Modifying Part Tracker for an Activity by Scanning Barcode Data*.
- You can also search for records by scanning barcode data in the Siebel Mobile application for Siebel Field Service. For more information, see *Searching for Records by Scanning Barcode Data*.

Searching for Records by Scanning Barcode Data

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 *Scanning Barcodes in Siebel Mobile*.

To search for records by scanning barcode data

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.

Using Attachments in Siebel Mobile

Attachments are supported by default in the Siebel Mobile application for Siebel Pharma version 8.1.1.10 or later. To use attachments in a different mobile application (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 allows you to keep supporting material for account and contact records by permitting you to associate an attachment with individual account and contact records. For more information about using attachments in the Siebel Mobile application for Siebel Pharma, see the following topics:

- *Modifying Attachment Information for an Account*
- *Modifying Attachment Information for a Contact*
- *Managing Attachment Downloads*
- *Managing Attachment Uploads*

Starting an External Application from Siebel Mobile

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

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

To start an external application from within a mobile application

- Tap the External Application URL link (or icon) on the details page in the main pane.

Printing 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.

To print from Siebel Mobile

1. With the page that you want to print displayed, tap the Share button (square with up arrow).

   The typical *Share* 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.

5 Getting Started (Siebel App)

Getting Started with Siebel Mobile Application Container (Siebel App)

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. It includes the following topics:

- *About the Siebel App, Siebel.maa File, and Mobile Application Framework*
- *Overview of Siebel Mobile Integration with Native Device Features*
- *Process of Integrating Siebel Mobile with Native Device Features*
- *Downloading and Installing the Siebel App*
- *Setting Up the Host Server for Siebel Mobile*
- *Configuring the Siebel App on iOS and Android Devices*
- *Resetting the Host Server Using the Siebel App*
- *Managing Attachments Using the Siebel App*
- *Configuring the Privacy Settings for Native Device Feature*
- *Setting Up CalDAV and CardDAV Publishing*

About the Siebel App, Siebel.maa File, and Mobile Application Framework

Before using the Siebel App, Siebel.maa file and Mobile Application Framework (MAF), note the following:

- Earlier versions of Siebel Server, prior to Siebel Innovation Pack 2015 patchset 15 or Siebel Innovation Pack 2016 patchset 5, will not work with version 2.16.10 or later of the Siebel app and Siebel.maa file.
- You cannot use an earlier version of the Siebel.maa file, prior to version 2.16.10, with MAF version 2.3.1 or later.
- You must upgrade to MAF version 2.6.4.x to use the Siebel app and Siebel.maa file version 2.16.10 and later.
- Xcode 12.x is required to generate the `.ipa` file and Android 10.0 (API 29) is required to generate the `.apk` file. In both cases (`.ipa`/`.apk`), the development environment requires JDeveloper 12.2.1 or later.

Overview of Siebel Mobile Integration with Native Device Features

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

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

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

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

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

Process of Integrating Siebel Mobile with Native Device Features

To integrate Siebel Mobile with the native features on your mobile device, perform the following tasks:

- *Downloading and Installing the Siebel App* or *Downloading and Using the Siebel Mobile Archive File (Administrator Task)*
- *Setting Up the Host Server for Siebel Mobile*
- *Configuring Single Sign-On for Siebel Mobile*
- *Configuring the Siebel App on iOS and Android Devices*
- *Resetting the Host Server Using the Siebel App*
- *Managing Attachment Downloads*
- *Managing Attachment Uploads*

- *Configuring the Privacy Settings for Native Device Feature*
- *Setting Up CalDAV and CardDAV Publishing*
- *Setting Up CardDAV Dynamic Mapping for Siebel CRM*

Downloading and Installing the Siebel App

This topic 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 will be able to access and use native device features, such as the local file system and location services, from Siebel Mobile.

Downloading and Installing the Siebel App from the Apple App Store

The following procedure shows you how to download and install the Siebel app (Siebel.ipa file) from the Apple App Store for iOS devices such as iPad. If you want to create and deploy your own customized Siebel app, then ignore this procedure and see *Downloading and Using the Siebel Mobile Archive File (Administrator Task)* for more information.

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

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

   For more information, see *Configuring the Siebel App on iOS and Android Devices*.

Downloading and Installing the Siebel App From Google Play

The following procedure shows you how to download and install the Siebel app (Siebel.apk file) from Google Play for Android devices such as Samsung Galaxy tablet. If you want to create and deploy your own customized Siebel app, then ignore this procedure and see *Downloading and Using the Siebel Mobile Archive File (Administrator Task)* for more information.

To download and install the Siebel app from Google Play

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

   For more information, see *Configuring the Siebel App on iOS and Android Devices*.

Downloading and Using the Siebel Mobile Archive File (Administrator Task)

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

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

http://docs.oracle.com/cd/E53569_01/tutorials/tut_jdev_maf_setup/tut_jdev_maf_setup.html

Related Topic

About the Siebel App, Siebel.maa File, and Mobile Application Framework

Setting Up the Host Server for Siebel Mobile

This task applies only if using Siebel Innovation Pack 2017 or later. If using an earlier innovation pack prior to 2017, then see *Setting Up the Host Server for Siebel Mobile (Innovation Pack 2016)*.

The following procedure shows you how to set up the host server where Siebel Mobile applications are located. You use the Siebel Management Console to configure the host server. 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.

To set up the host server for Siebel Mobile (Innovation Pack 2017 or later)

1. Log in to the Siebel Management Console.
2. Click 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. Click 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.
   b. Select the Mobile option and then configure the parameters for the application as shown in the following table.

c. Repeat these steps for each application you want to configure for Siebel Mobile.

Parameter	Description
Configure Siebel Mobile	Select this check box to configure a Siebel Mobile application (a mobile version of the application).
Application Display Name	Specify the display name of the Siebel Mobile application. For example: epharmam, salesm, or servicem.
Application Display Order	Specify the display order of the Siebel Mobile application. For example: 1, 2, or 3.
Application Icon Name	Specify the icon of the Siebel Mobile application. For example: epharma.png, sales.png, or service.png.

4. Click Submit to save your changes to the application interface profile.

Setting Up the Host Server for Siebel Mobile in Siebel Innovation Pack 2016 or Earlier

This task applies only if using Siebel Mobile version 2.x in Siebel Innovation Pack 2016 or earlier. If using Siebel Innovation Pack 2017 or later, then see *Setting Up the Host Server for Siebel Mobile*.

The following procedure shows you how to set up the host server where Siebel Mobile applications are located.

To set up the host server for Siebel Mobile (Innovation Pack 2016)

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

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

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

Field	Web Server Path
Windows	`C:\inetpub\wwwroot\`
Linux	

Field	Web Server Path
	Build_Install_Directory/web/Oracle_WT1/instances/instance1/config/OHS/ohs1/htdocs>
Solaris	Build_Install_Directory/web/https-localhost/docs
HP-UX	Build_Install_Directory/web/htdocs
AIX	Build_Install_Directory/web/htdocs

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

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

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

3. Edit the mobileapplist.lst file as follows:

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

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

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

   d. Save and close the mobileapplist.lst file.

4. Change the MIME type for mobileapplist.lst as follows:

   a. Open Internet Information Services Manager.
   b. Navigate to the Features view and double-click MIME Types.
   c. Right-click the .lst MIME type and select Edit.
   d. In the MIME Type field, type in `text/plain`, and then click OK.

Customizing the Siebel App Application Icons in Siebel Innovation Pack 2016 or Earlier

This task applies only if using Siebel Mobile version 2.x in Siebel Innovation Pack 2016 or earlier. If using Siebel Innovation Pack 2017 or later, then see *Setting Up the Host Server for Siebel Mobile*.

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

To customize the Siebel App application icons

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

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

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

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

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

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

   ```
   {
   "1":{"id":"1","name":"Siebel ePharma
   Mobile","lang":"LanguageCode","icon":"epharma.png", "url":"http(s)://
   webserver.com/epharmam_LanguageCode/"},
   "2":{"id":"2","name":"Siebel Service for
   Mobile","lang":"LanguageCode","icon":"service.png", "url":"http(s)://
   webserver.com/servicem_LanguageCode/"},
   "3":{"id":"3","name":"Siebel Sales
   Mobile","lang":"LanguageCode","icon":"sales.png", "url":"http(s)://
   webserver.com/salesm_LanguageCode/"}
   }
   ```

3. Save and close the mobileapplist.lst file.

Configuring Single Sign-On for Siebel Mobile

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

The following procedure shows you how to configure SSO for Siebel Mobile if using Siebel Innovation Pack 2017 or later.

To configure SSO for Siebel Mobile (Innovation Pack 2017)

1. Log in to the Siebel Management Console.
2. Click 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 do the following:

   a. Click Applications and then 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.
   b. Select the Enhanced Authentication option and then select the Configure Web Single Sign-On (Web SSO) check box.
   c. For Trust Token, specify the password to be used with SSO authentication.
   d. 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. Click Submit to save your changes to the application interface profile.

The following procedure shows you how to configure SSO for Siebel Mobile if using Siebel Innovation Pack 2016 or earlier.

To configure SSO for Siebel Mobile (Innovation Pack 2016)

1. Open the mobileapplist.lst file in a text editor.
2. Modify the mobileapplist.lst file by adding "authmode":"sso" as follows:

```
{
"1":{"id":"1","name":"Siebel ePharma
Mobile","lang":"LanguageCode","url":"http(s):// webserver_hostname/epharmam_
LanguageCode/","authmode":"sso"},
"2":{"id":"2","name":"Siebel Service for
Mobile","lang":"LanguageCode","url":"http(s):// webserver_hostname/servicem_
LanguageCode/","authmode":"sso"}
"3":{"id":"3","name":"Siebel Sales
Mobile","lang":"LanguageCode","url":"http(s):// webserver_hostname/salesm_
LanguageCode/","authmode":"sso"}
}
```

3. Save and close the mobileapplist.lst file.

Configuring the Siebel App on iOS and Android Devices

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 host server address. You must set up the host server first as shown in *Setting Up the Host Server for Siebel Mobile*. After the host server is set up, you can connect to multiple applications in a single Siebel app.

This procedure assumes that you have already downloaded and installed the Siebel app from either the Apple App Store for iOS devices or from Google Play for Android devices as shown in *Downloading and Installing the Siebel App*.

To configure the Siebel app

1. If not already done so, set up the Host Server where Siebel Mobile applications are located as shown in *Setting Up the Host Server for Siebel Mobile*.
2. Start your iOS or Android device and then tap Siebel to start the Siebel app.
3. In the Host section, type in the host server address where Siebel Mobile applications are located, for example, as follows:
   - For Siebel Innovation Pack 2016 and earlier, the host server address follows: `http://hostserveraddress.com`
   - For Siebel Innovation Pack 2017 and later, the host server address follows: `http://hostserveraddress.com/siebel/v1.0/applicationlist`

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

   > **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 All option to reset the server. For more information, see *Resetting the Host Server Using the Siebel App*.

4. If this is your first time starting the Siebel app on your mobile device, then do the following:
   - Tap Yes when prompted to Install Siebel Certificate, and install the certificate on your mobile device.

     > **Note:** For iOS 10.3 and later, you must trust the certificate by going to iOS Settings, General, About, Certificate Trust Settings, and selecting the certificate (Siebel Mobile Internal CA) you installed. This step does not apply for Android devices.

   - Accept the end-user license agreement.
5. Tap the arrow next to the host server address to go to the Home page (Application List screen) of the Siebel app.

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

   The Application List is populated from the mobileapplist file that you must configure as shown in *Setting Up the Host Server for Siebel Mobile*.

   Each application in the Application List has a unique icon. You can customize the icon associated with each application as shown in *Customizing the Siebel App Application Icons (Siebel Innovation Pack 2016)*.
6. Connect to an application as follows:
   a. Tap the Edit button next to the application that you want to connect to.
   b. Type in the Username and Password credentials for the application, and then tap Sign In.

      After successful login, the application starts and is rendered as normal in the Siebel app. The following buttons appear 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. For more information, see *Managing Attachment Downloads*.
- **Home button** for returning to the Home page (Application List screen) of the Siebel app.

Note: The Identifier does not apply to Siebel Mobile connected applications.

Resetting the Host Server Using the Siebel App

The following procedure shows you how to 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.

To reset the host server using the Siebel app

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

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

   The next time you start the Siebel app, the connection field or host server address field will be empty. For more information about connecting to the host server, see *Configuring the Siebel App on iOS and Android Devices*.

Managing Attachments Using the Siebel App

If you are using the Siebel app with Siebel Mobile version 2.0 or later, then you can manage the download 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:

- **Check box.** If checked, this indicates that the attachment record is selected for download or upload. If unchecked, the attachment record is not selected.
- **List Order.** A number in the List Order field indicates the rank or sequence number for the attachment record. You can 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.

Managing Attachment Downloads

The following procedure shows you how to manage the download of attachments using the Attachment Manager view in the Siebel app. 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 synchronization process.

To manage attachment downloads

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) *Configuring the Siebel App on iOS and Android Devices*.
3. Create attachment records as required.

   For more information, see *Modifying Attachment Information for an Account* and *Modifying Attachment Information 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 check box 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.

Managing Attachment Uploads

The following procedure shows you how to manage the upload of attachments using the Attachment Manager view in the Siebel app. 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 synchronization process.

To manage attachment uploads

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 uploads.

   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, Home.

   For more information about these buttons, see (Step 6 in) *Configuring the Siebel App on iOS and Android Devices*.
3. Create attachment records as required.

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

   - **Upload.** Tap to queue the selected attachment records for upload.
   - **Remove.** Tap 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.

Configuring the Privacy Settings for Native Device Feature

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

- *Configuring the Privacy Settings on i OS Devices*
- *Configuring the Privacy Settings on Android Devices*

Configuring the Privacy Settings on iOS Devices

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

To configure the privacy settings on iOS devices

1. Start your iOS device.
2. Tap Settings, tap Privacy and then tap Location Services to turn on the setting.
3. The map functionality is now enabled for Siebel Mobile. For more information about using the map functionality, see *Displaying Location Details in Siebel Mobile*.

Configuring the Privacy Settings on Android Devices

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

To configure the privacy settings on Android devices

1. Start your mobile device.
2. Tap Google Settings, tap Location and then tap Location Reporting to turn on the setting.
3. The map functionality is now enabled for Siebel Mobile. For more information about using the map functionality, see *Displaying Location Details in Siebel Mobile*.

Setting Up CalDAV and CardDAV Publishing

CalDAV (Calendaring Extensions to WebDAV) is an internet standard allowing clients to access scheduling or meeting information on a remote server. It uses iCalendar format for data. *CardDAV* (vCard Extensions to WebDAV) is an address book client-server protocol allowing users to share contact data on a server.

The key requirement for using CalDAV and CardDAV publishing is email address. All contacts and employees must be associated with a valid email address. For CalDAV, the identification of meeting participants depends entirely on the email address. All users must have the same email address registered in the Siebel application and on their mobile device.

URL Syntax for CalDAV Account Setup

For CalDAV clients to access Siebel DAV, the following URL syntax is required for setting up new CalDAV accounts:

```
http://<server>:<port>/siebel/dav/<lang><user_name>/
```

For example: `http://example:1661/siebel/dav/enu/JDOE/`

If the client does not support service discovery, then use the collection URL instead:

```
http://<server>:<port>/siebel/dav/<lang>/<user_name)/calendar/event
```

For example: `http://example:1661/siebel/dav/enu/JDOE/calendar/event/`

URL Syntax for CardDAV Account Setup

For CardDAV clients to access Siebel DAV, the following URL syntax is required for setting up new CardDAV accounts:

```
http://<server>:<port>/siebel/dav/<lang>/<user_name>
```

For example: `http://example:1661/siebel/dav/enu/JDOE/`

If the client does not support service discovery, then use the collection URL instead:

```
http://<server>:<port>/siebel/dav/<lang>/<user_name>/addressbook/ contact
```

For example: `http://example:1661/siebel/dav/enu/JDOE/addressbook/contact/`

Setting Up CalDAV Publishing on an iOS Device

The following procedure shows you how to set up CalDAV publishing on an iOS mobile device. Before setting up CalDAV publishing on your mobile device, make sure that you can access the Siebel application on your device.

To set up CalDAV publishing on an iOS device (such as iPad)

1. Tap Settings, tap Mail, Contacts, Calender, and then tap Add Account.
2. Select Other, then select Add CalDAV Account and enter the following information:
   - **Server.** The Siebel Application Interface host name (for example, caldav.example.com).
   - **Username.** The user name to access the Siebel application (case sensitive).
   - **Password.** The password to access the Siebel application (case sensitive).
   - **Description.** A description to help identify the calendar in your list of calendars (for example, CalDAV Calendar Work).
3. Tap Next.

   > **Note:** If the following warning message appears, select Details to review the certificate details, and then select Trust if the certificate is correct: `Cannot Verify Server Identify - The identity of <Server> cannot be verified by <Description>. Review the certificate details to continue.`

4. Select Continue when the following message appears:

   ```
   Cannot Connect Using SSL - Do you want to try setting up the account without SSL?
   ```

5. Select OK when the following message appears:

   ```
   Calendar Account - CalDAV account verification failed.
   ```

6. Tap Advanced Settings, and then select Use SSL if required.

   Your decision to Use SSL or not depends on how the Siebel Application Interface is configured to access Siebel CalDAV and CardDAV.

7. Specify the port number and then append `siebel/dav/<language>/<user_name>/` to the Account URL, for example as follows:

   ```
   caldav.example.com:16661/siebel/dav/enu/JDOE
   ```

   > **Note:** You can replace `<user_name>` with the name of whom ever granted you access to their calendar in Siebel.

8. Tap CalDAV, and then tap Next to start the account verification.

   If account verification fails, go back and check that you have entered all the correct information.

9. After account verification is successful, select whether you want to synchronize Calendars, Reminders, or both, and then tap Save.

   Make sure you select Calendars.
10. Tap Calendar on your mobile device, and then select Calendars.

    The list of available calendars appears. The calendar that you just created shows up in this list.

Setting Up CalDAV and CardDAV Publishing on an Android Device

The native Calendar and Contact (address book) applications for Android do not support CalDAV and CardDAV and, as a result, require a third-party client to connect to the CalDAV and CardDAV server. To enable CalDAV and CardDAV on your Android device, you must follow the instructions of the selected third-party application.

Before setting up CalDAV or CardDAV publishing on your Android device, make sure that you can access the Siebel application on your device. Other items to note include the following:

- Enable Use SSL on your Android device if required.

  Your decision to Use SSL or not depends on how the Siebel Application Interface is configured to access Siebel CalDAV and CardDAV.
- Use the following Home URL to connect to the server:

  `http://webserver_hostname:port/siebel/dav/language/user_name`

  For example: **`http://caldav.example.com:1661/siebel/dav/enu/JDOE/`**

  Depending on the client, you might have to use the collection URLs instead:

  - CalDAV: **`http://webserver_hostname:port/siebel/dav/language/user_name/calendar/event/`**

    For example: **`http://caldav.example.com:1661/siebel/dav/enu/JDOE/calendar/event/`**
  - CardDAV: **`http://webserver_hostname:port/siebel/dav/language/user_name/addressbook/contact`**

    For example: **`http://carddav.example.com:16661/siebel/dav/enu/JDOE/addressbook/contact/`**
- The user name and password credentials must be the same credentials used to log in to the Siebel application.
- Accept the server certificate if Use SSL is enabled.
- The CalDAV Provider is Generic.
- The CardDAV Provider is Generic.
- The WebDav Provider is Generic.

6 Siebel Mobile Application for Siebel Pharma

Using the Siebel Mobile Application for Siebel Pharma

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

- *Using the Home Page for Siebel Pharma*
- *Managing Calls for Siebel Pharma*
- *Managing Accounts for Siebel Pharma*
- *Managing Contacts for Siebel Pharma*
- *Managing Messaging Plans*
- *Using the PCD Viewer in Siebel Mobile*
- *Task Flows for Siebel Pharma*

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

Using the Home Page for Siebel Pharma

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

- *Viewing Call Planning Information*
- *Scheduling 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.

Viewing 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* .

To view the call planning 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.

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

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 *Scheduling Calls For Contacts and Accounts*.
   - Tap a call on the calendar to drill down on and display the call details. For more information, see *Displaying Call Details (Siebel Pharma)*.

Scheduling 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* .

To schedule calls for contacts and accounts

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.
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 *Modifying Call Information*.

e. Modify the related items for the call as required. For more information, see *Displaying Call Details (Siebel Pharma)*.

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 *Modifying Call Information*.
   e. Modify the related items for the call as required. For more information, see in *Displaying Call Details (Siebel Pharma)*.

Managing Calls for Siebel Pharma

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

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

- *Displaying Call Details (Siebel Pharma)*
- *Modifying Call Information*
- *Modifying Attendee Information for a Call*
- *Modifying Promotional Items for a Call*
- *Modifying Samples for a Call*
- *Modifying Product Details for a Call*
- *Viewing the Validation Results for a Call*
- *Adding Literature Information to a Call*
- *Viewing Presentation Detail Information for a Call*
- *Capturing Signatures for Calls*
- *Submitting 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.

Displaying Call Details

You can display call details by using the calendar.

To display call details

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:
     - *Viewing Call Planning Information*
     - *Scheduling Calls For Contacts and Accounts*
   - **Attendees.** Shows the attendee information for the call. For more information, see *Modifying Attendee Information for a Call*.
   - **Promotional Items Dropped.** Shows the number of dropped promotional items for the call. For more information, see *Modifying Promotional Items for a Call*.
   - **Samples Dropped.** Shows the number of dropped samples for the call. For more information, see *Modifying Samples for a Call*.
   - **Product Details.** Shows the product details for the call. For more information, see *Modifying Product Details for a Call*.
   - **Validation Results.** Shows the validation results for the call. For more information, see *Viewing the Validation Results for a Call*.
   - **Literature.** Shows the literature information for the call. For more information, see *Adding Literature Information to a Call*.
   - **Presentation Detail.** Shows the presentation detail information for the call. For more information, see *Viewing 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 *Showing Presentations in Siebel Mobile*.

Modifying Call Information

Complete the following procedure to modify call information.

To modify 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.
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 *Scheduling Calls For Contacts and Accounts*.

Modifying Attendee Information for a Call

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

To modify the attendee information for a call

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.
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:

      - *Modifying Promotional Items for a Call*
      - *Modifying Samples for a Call*
   c. Capture a signature for the call as required. For more information, see *Capturing Signatures for Calls*.

Modifying Promotional Items for a Call

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

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

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

To modify the promotional items for a call

1. Tap 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.

Modifying Samples for a Call

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

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

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

To modify the samples for a call

1. Tap 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.
Quantity	Type the quantity of the sample to give to the call customer.

Modifying Product Details for a Call

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

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

To modify the product details for a call

1. Tap 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.
Indication	Displays the purpose or therapeutic area that the product drug addresses. Values for an indication include the following: Allergy, Asthma, Arrhythmia, Heart Failure, Syncope, and Other.

Viewing the Validation Results for a Call

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

To view the validation results for a call

1. Tap 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.

Adding Literature Information to a Call

Complete the following procedure to add literature information to a call. Literature information includes sales and marketing literature, such as product brochures, 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* .

To add literature information to a 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. 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.

Viewing Presentation Detail Information for a Call

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

To view the presentation detail information for a call

1. Tap 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).
Duration	The duration in seconds that the presentation item (messaging plan, messaging plan item, or related messaging plan item) was shown during the call.
Sequence	Tracks the message plan items that are detailed and submitted for the call.

Related Topics

Using the PCD Viewer in Siebel Mobile

Recording Responses to Presentations in Siebel Mobile

Capturing Signatures for Calls

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

To capture the electronic signature for a call

1. Tap 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.

Submitting a Call for Processing

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

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

To submit a call for processing

1. Tap 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.

Managing Accounts for Siebel Pharma

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

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

- *Displaying Account Details (Siebel Pharma)*

- *Modifying Account Information*
- *Modifying Contact Information for an Account*
- *Modifying Call Information for an Account*
- *Modifying Address Information for an Account*
- *Modifying Contact Affiliation Information for an Account*
- *Modifying Account Relationship Information for an Account*
- *Modifying Attachment Information 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.

Displaying Account Details

You can display account details by using the Accounts list.

To display account details

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 *Modifying Contact Information for an Account*.
    - **Calls.** Shows the call information for the account. For more information, see *Modifying Call Information for an Account*.
    - **Addresses.** Shows the address information for the account. For more information, see *Modifying Address Information for an Account*.
    - **Contact Affiliations.** Shows the contact affiliation information for the account. For more information, see *Modifying Contact Affiliation Information for an Account*.
    - **Account Relationships.** Shows the account relationship information for the account. For more information, see *Modifying Account Relationship Information for an Account*.
    - **Attachments.** Shows the attachments for the account. For more information, see *Modifying Attachment Information for an Account*.
4. To show a presentation for the selected account, tap the Detail button in the main pane. For more information, see *Showing Presentations in Siebel Mobile*.

Modifying Account Information

Complete the following procedure to modify account information.

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.

Modifying Contact Information for an Account

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

To modify the contact information for an account

1. Tap 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.

Modifying Call Information for an Account

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

To modify the call information for an account

1. Tap 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.

Modifying Address Information for an Account

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

To modify the address information for an account

1. Tap 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.
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.

Modifying Contact Affiliation Information for an Account

Complete the following procedure to modify the contact affiliation information for an account. You can also affiliate accounts with a contact. For more information, see *Modifying Account Affiliation Information for a Contact*.

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

Modifying Account Relationship Information for an Account

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

To modify the account relationship information for an account

1. Tap 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.
Other Account	Select an account to associate with this account.
Relationship	Select the relationship that the other account has with this account.
Site	Displays the site for the other account that you select.

Modifying Attachment Information for an Account

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

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

To modify the attachment information (file or URL) 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 attachment (file or URL) as follows:
    a. Tap Attachment in the list in the side pane.

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

        You must navigate away from the record to save your changes to it.
4. If using an iOS device (such as iPad), then attach files and open attachment files as follows:
    a. To attach an existing file from the gallery:
        - Tap Attachment in the list in the side pane, and then tap the New File button.
        - Tap Choose Existing, select an existing file to attach to the record, and then tap OK.
    b. To attach a new photo or video:
        - Tap Attachment in the list in the side pane, and then tap the New File button.
        - Tap Take Photo or Video, take an instant photo or record an instant video and then tap OK to attach the photo or video to the record.
    c. To open an attachment file in a new window, tap the attachment name link.
5. If using a non-iOS device (such as Samsung Galaxy tablet), then attach files and open attachment files as follows:
    a. To upload a new attachment file to Siebel Server from a mobile device:
        - Tap Attachment in the list in the side pane, and then tap the New File button.
        - Browse to and select the file that you want to upload, and then tap OK.
    b. To download an attachment file from Siebel Server to a mobile device:
        - Tap Attachment in the list in the side pane, and then tap the down arrow next to the attachment name in the main pane.
        - Tap Download. The attachment is saved to the Downloads folder on the mobile device.
    c. To open an attachment file, tap the down arrow next to the attachment name and then tap Open.

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

Managing Contacts for Siebel Pharma

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

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

- *Displaying Contact Details (Siebel Pharma)*
- *Modifying Contact Information*
- *Modifying Call Information for a Contact*
- *Modifying Address Information for a Contact*
- *Modifying Best Time Information for a Contact*
- *Modifying State License Information for a Contact*
- *Modifying Account Affiliation Information for a Contact*
- *Modifying Contact Relationship Information for a Contact*
- *Modifying Attachment Information 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.

Displaying Contact Details

You can display contact details by using the Contacts list.

To display contact details

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 *Modifying Call Information for a Contact*.
   - **Addresses.** Shows the address information for the contact. For more information, see *Modifying Address Information for a Contact*.
   - **Best Times.** Shows the best-time-to-call information for the contact. For more information, see *Modifying Best Time Information for a Contact*.
   - **State Licenses.** Shows the state license information for the contact. For more information, see *Modifying State License Information for a Contact*.
   - **Account Affiliations.** Shows the account affiliation information for the contact. For more information, see *Modifying Account Affiliation Information for a Contact*.

- **Contact Relationships.** Shows the contact relationship information for the contact. For more information, see *Modifying Contact Relationship Information for a Contact*.
- **Attachments.** Shows the attachments for the account. For more information, see *Modifying Attachment Information for a Contact*.

4. To show a presentation for the selected contact, tap the Detail button in the main pane. For more information, see *Showing Presentations in Siebel Mobile*.

Modifying Contact Information

Complete the following procedure to modify contact information.

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 Call Information for a Contact

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

To modify the call information for a contact

1. Tap 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.

Modifying Address Information for a Contact

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

To modify the address information for a contact

1. Tap 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.

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.

Modifying Best Time Information for a Contact

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

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

To modify the best time 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 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.

Modifying State License Information for a Contact

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

To modify the state license information for a contact

1. Tap 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.

Modifying Account Affiliation Information for a Contact

Complete the following procedure to modify the account affiliation information for a contact. You can set up such an affiliation for call-reporting purposes. You can also affiliate contacts with an account. For more information, see *Modifying Contact Affiliation Information for an Account*.

To modify the account affiliation 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 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.

Modifying Contact Relationship Information for a Contact

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

To modify the contact relationship information for a contact

1. Tap 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.

Modifying Attachment Information for a Contact

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

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

To modify the attachment information (file or URL) 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 attachment (file or URL) as follows:
    a. Tap Attachment in the list in the side pane.

        All attachments associated with the contact appear in the Attachments list in the main pane.
    b. Tap the attachment that you want to update in the main pane.
    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. If using an iOS device (iPad), then attach files and open attachment files as follows:
    a. To attach an existing file from the gallery:
        - Tap Attachment in the list in the side pane, and then tap New File in the main pane.
        - Tap Choose Existing, select an existing file to attach to the record, and then tap OK.
    b. To attach a new photo or video:
        - Tap Attachment in the list in the side pane, and then tap New File in the main pane.
        - Tap Take Photo or Video, take an instant photo or record an instant video and then tap OK to attach the photo or video to the record.
    c. To open an attachment file, tap the attachment name link.

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

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

Managing Messaging Plans

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

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

- *Displaying Messaging Plan Details*
- *Using the PCD Viewer in Siebel Mobile*

Displaying Messaging Plan Details

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

To display messaging details

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 *Showing 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.

Using the PCD Viewer in Siebel Mobile

The Personalized Content Delivery Viewer is available in Siebel Pharma and by default for Calls, Accounts, Contacts, and Messaging Plans in the Siebel Mobile application for Siebel Pharma. In the Siebel Mobile application for Siebel Pharma, you must start the viewer by selecting the Detail button. However, you can use the PCD Viewer on any other applet

in the mobile application provided that you configure the Detail button for the applet. For more information about configuring the Detail button for applets in general in Siebel Mobile, see the topic about configuring interactive detailing in *Configuring Siebel Open UI* .

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

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

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

- Plan for presentation delivery by reviewing the available messaging plans and any existing call presentation information. For more information, see *Managing Messaging Plans* and *Viewing 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 *Setting the Server Uncompression Location*.

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

- *Showing Presentations in Siebel Mobile*
- *Recording Responses to Presentations in Siebel Mobile*

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

Showing Presentations in Siebel Mobile

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

To show presentations in Siebel Mobile

1. Navigate to one of the following views:
    - **Call Details view.** Tap Side Menu, tap Calls, and then drill down on a call in the calendar in the main pane. For more information, see *Displaying Call Details (Siebel Pharma)*.
    - **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 *Displaying Account Details (Siebel Pharma)*.
    - **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 *Displaying Contact Details (Siebel Pharma)*.
    - **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 *Displaying 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 *Setting the Server Uncompression Location*.

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 *Recording 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 *Recording 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.

Recording Responses to Presentations in Siebel Mobile

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

To record responses to presentations during a call

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

   The Feedback page opens showing the list of contacts who attended the presentation session. For each selected contact, a summary of the content that was presented including the time (in seconds) spent on each presentation item appears after the Contact list in thumbnail format. For more information about showing presentations, see *Showing 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 *Viewing 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 *Modifying 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.

Setting the Server Uncompression Location

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

To set the server uncompression location

1. Log in to the Siebel business application
2. Navigate to the Administration - Application screen, then the System Preference view.
3. Query for the Server Uncompression Location system preference.
4. Enter the server location path where you want uncompression to happen.

   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

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

- *Planning and Preparing for Customer Calls*
- *Conducting Customer Calls*

Planning and Preparing 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 *Viewing Call Planning Information* and *Displaying Location Details in Siebel Mobile*.
- Review the notifications list. For more information, see *Reviewing 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:
        - *Displaying Contact Details (Siebel Pharma)*
        - *Modifying Contact Information*
    - Review, modify, and create new contact calls as required. For more information, see *Modifying 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:
        - *Modifying Address Information for a Contact*
        - *Modifying Best Time Information for a Contact*
        - *Modifying State License Information for a Contact*
        - *Modifying Account Affiliation Information for a Contact*
        - *Modifying Contact Relationship Information for a Contact*
        - *Modifying Attachment Information 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:
        - *Displaying Account Details (Siebel Pharma)*
        - *Modifying Account Information*
    - Review, modify, and create new account calls as required. For more information, see *Modifying 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:
        - *Modifying Contact Information for an Account*
        - *Modifying Address Information for an Account*
        - *Modifying Contact Affiliation Information for an Account*
        - *Modifying Account Relationship Information for an Account*

- *Modifying Attachment Information for an Account*

Conducting Customer Calls

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

- Review, modify, and create new calls as required. For more information, see the following:
  - *Modifying Attendee Information for a Call*
  - *Displaying Call Details (Siebel Pharma)*
  - *Modifying 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:
  - *Modifying Attendee Information for a Call*
  - *Modifying Promotional Items for a Call*
  - *Modifying Samples for a Call*
  - *Modifying Product Details for a Call*
  - *Adding Literature Information to a Call*
  - *Viewing Presentation Detail Information for a Call*
- Deliver personalized content and presentations to customers and capture feedback as required. For more information, see *Using the PCD Viewer in Siebel Mobile*.
- Record signatures for calls. For more information, see *Capturing Signatures for Calls*.
- Submit calls for processing. For more information, see *Submitting 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 *Managing Accounts for Siebel Pharma*.

7 Siebel Mobile Application for Siebel Consumer Goods

Using the Siebel Mobile Application for Siebel Consumer Goods

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

- *Using the Home Page for Siebel Consumer Goods*
- *Managing Calls for Siebel Consumer Goods*
- *Managing Contacts for Siebel Consumer Goods*
- *Managing Accounts for Siebel Consumer Goods*
- *Managing Routes for Siebel Consumer Goods*
- *Managing Orders for Siebel Consumer Goods*
- *Managing Return Orders for Siebel Consumer Goods*
- *Managing Inventory for Siebel Consumer Goods*
- *Managing Cycle Counting for Siebel Consumer Goods*
- *Managing Deposits for Siebel Consumer Goods*
- *Managing Invoices for Siebel Consumer Goods*
- *Task Flows for Siebel Consumer Goods*

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

Using the Home Page for Siebel Consumer Goods

The Siebel Mobile application for Siebel Consumer Goods uses the Zante UI theme by default. If using Siebel Innovation Pack 2015 or earlier versions of the Siebel Mobile application for Siebel Consumer Goods, 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.

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

- *Navigating to the Home Page (Siebel Consumer Goods)*
- *Viewing Call Planning Information on the Calendar*
- *Scheduling Calls for Accounts*

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

Navigating to the Home Page

The following procedure shows you how to navigate to the home page of the Siebel Mobile application for Siebel Consumer Goods (if not already displayed).

To navigate to the home page

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

  The home page consists of the calendar and accounts list:

  - The Calendar in the main pane shows call planning and scheduling information.
  - The Accounts list in the side pane shows summary account information.

  For more information about the calendar and accounts list, see *Viewing Call Planning Information on the Calendar* and *Scheduling Calls for Accounts*.

Viewing Call Planning Information on the Calendar

On the home page, you can view the call planning and scheduling information for accounts on 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* .

To view the call planning information

1. Tap Side Menu and then tap Calls to display the home page, which consists of the following:
   - The Calendar showing call planning information in the main pane.
   - The Accounts list showing summary account information in the side pane.
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 the Daily, Weekly, or Monthly calendar buttons to switch between the daily, weekly, or monthly view of calls scheduled.
   - Tap Today to see the calls scheduled for today's date.
3. On the calendar in the 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.

- Tap a call on the calendar to drill down and open the call details. For more information, see *Displaying Call Details (Siebel Consumer Goods)*.

4. On the accounts list in the side pane, you can do the following:
   - Sort the accounts list based on one of the following fields as required: Name, Site, Address, Route.
   - Select the account that you want.
   - Schedule a call for an account, see *Scheduling Calls for Accounts*.

Scheduling Calls for Accounts

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

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* .

To schedule calls for accounts

1. Tap Side Menu and then tap Calls to display the home page, which consists of the following:
   - The Calendar showing call planning information in the main pane.
   - The Accounts list showing summary account information in the side pane.
2. Schedule a new account call as follows:
   a. Select an account from the Accounts list in the side pane and (without releasing the selection) then move the account onto the calendar in the main pane.
   b. Tap the new call on the calendar to open it. For more information, see *Displaying Call Details (Siebel Consumer Goods)*.
   c. Modify the call details as required. For more information, see *Modifying Call Details* and *Modifying Activity Information for a Call*.

Managing Calls for Siebel Consumer Goods

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

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

- *Displaying Call Details (Siebel Consumer Goods)*
- *Modifying Call Details*
- *Preparing for a Call Visit*
- *Starting a Call*
- *Ending a Call*
- *Modifying Activity Information for a Call*
- *Modifying Retail Audit Information for a Call*

- *Modifying Merchandising Audit Information for a Call*
- *Modifying Order Information for a Call*
- *Modifying Note Information for a Call*
- *Modifying Assessment Information for a Call*
- *Viewing Presentation Information for a Call*
- *Prerequisites to Viewing Presentation Informationfor a Call*
- *Showing Presentations for a Call*
- *Recording Responses to Presentations*

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

Displaying Call Details

You can display call details by using the Call Items view or the home page.

To display call details

1. Tap Side Menu and then tap Call Items to display the following:
    - Call details and activities in the main pane.
    - Summary call details and a second level navigation list in the side pane.

    Note: Alternately, tap Side Menu, tap Calls to display the home page, and then tap a call on the calendar in the main pane to open it and display the following:
        - Call details and activities in the main pane.
        - Summary call details and a second level navigation list in the side pane.

    Tasks that you can perform from this view include the following:
    - *Modifying Call Details*
    - *Starting a Call*
    - *Ending a Call*
    - *Preparing for a Call Visit*
2. Navigate to the call that you want using the navigation arrows in the main pane.

    All activities for the call appear after the call details in the main pane.
3. Navigate to the following call related information using the second level navigation list in the side pane:
    - **Retail Audits.** Shows the retail audit information for the call. For more information, see *Modifying Retail Audit Information for a Call*.
    - **Merchandising Audits.** Shows the merchandising audit information for the call. For more information, see *Modifying Merchandising Audit Information for a Call*.
    - **Orders.** Shows the order information for the call. For more information, see *Modifying Order Information for a Call*.

- **Notes.** Shows the note information for to the call. For more information, see *Modifying Note Information for a Call*.
- **Assessments.** Shows the assessment information for the call. For more information, see *Modifying Assessment Information for a Call* .
- **Presentation Details.** Shows the presentation detail information for the call. For more information, see *Viewing Presentation Information for a Call*.

Note: You configure second level navigation views in Siebel Tools. For more information, see *About the Siebel Mobile Aurora and Zante UI Themes*.

Modifying Call Details

Complete the following procedure to modify the call details.

To modify call details

1. Tap Side Menu and then tap Calls Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Tap the record field that you want to update, and update the field value.

Modifying Activity Information for a Call

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

To modify the activity information for a call

1. Tap Side Menu and then tap Calls Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details and a (second level navigation view) list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Update an existing call activity as follows:
   a. 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.
   b. (Optional) Tap the activity that you want to update, and then tap the Start Activity button to record the start date and time for the activity.
   c. (Optional) Tap the activity that you want to update, and then tap the End Activity button to record the end date and time for the activity.

d. (Optional) Tap an activity of type Retail Order that you want to update, and then tap the Prepare Visit button to automatically create an order for the call. For more information, see *Preparing for a Call Visit*.

4. Create a new call activity as follows:

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

Starting a Call

To start a call, complete the following procedure.

To start a call

1. Tap Side Menu and then tap Calls Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Tap the Start button in the main pane to record the start date and time for the call.
4. Review all related information for the call and update the information as required.

   For more information about call related information, see *Displaying Call Details (Siebel Consumer Goods)*.

Ending a Call

To end a call, complete the following procedure.

To end a call

1. Tap Side Menu and then tap Calls Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Tap the End button in the main pane to record the end date and time for the call.

Preparing for a Call Visit

If an activity of type Retail Order is associated with a call, then you can use the Prepare Visit button to automatically create an order for the call.

To prepare for a visit

1. Tap Side Menu and then tap Calls Items to display the following:
    - Call details and activities in the main pane.
    - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Tap the Prepare Visit button in the main pane to automatically create an order for the call, where the order line items are populated with appropriate products.

Modifying Retail Audit Information for a Call

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

To modify the retail audit information for a call

1. Tap Side Menu and then tap Calls Items to display the following:
    - Call details and activities in the main pane.
    - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Update an existing retail audit for the call as follows:
    a. Start the activity (if not already started) as follows:
        - Select an activity of type Retail Audit in the main pane.
        - Tap the Start Activity button to record the start date and time for the activity.
        - Drill down on the Retail Audit link in the Type field.

          All the products for the retail audit associated with the call appear in the main pane. If you can see no products, then tap List Products.
    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. After completing a retail audit for the call, end the activity as follows:
    a. Navigate back to the Call Items view and select the activity, of type Retail Audit, that you want to end.
    b. Tap the End Activity button to record the end date and time for the activity.

Modifying Merchandising Audit Information for a Call

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

To modify the merchandising audit information for a call

1. Tap Side Menu and then tap Call Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.
   All activities for the call appear after the call details in the main pane.
3. Update an existing merchandising audit as follows:
   a. Start the activity (if not already started) as follows:
      - Select an activity of type Merchandising Audit in the main pane.
      - Tap the Start Activity button to record the start date and time for the activity.
      - Drill down on the Merchandising Audit link in the Type field.
        All the products for the merchandising audit appear in the main pane under Merchandising Audit.
   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. Add new products for merchandising audit as follows:
   a. Tap Merchandising Audits in the list in the side pane, and then tap New (the plus (+) icon) next to Merchandising Audit in the main pane.
   b. Enter the information for the product to be audited in the fields that appear, and then save the record.
      After you add one product, the New File button next to Images in the main pane becomes enabled and you can capture images for the product to be audited as described in the next step.
5. Capture images for merchandising audit products as follows:
   a. Tap Merchandising Audits in the list in the side pane.
   b. Select the record that you want to modify, and then tap New File next to Images in the main pane.
   c. Do one of the following as required:
      - Tap Choose Existing, select an existing image file to attach to the record, and then tap OK.
      - Tap Take Photo or Video, take an instant photo or record an instant video, and then tap OK to attach the photo or video to the record.
6. After completing a merchandising audit for the call, end the activity as follows:
   a. Navigate back to the Call Items view and select the activity, of type Merchandising Audit, that you want to end.
   b. Tap the End Activity button to record the end date and time for the activity.

Modifying Order Information for a Call

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

To modify the order information for a call

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

- Call details and activities in the main pane.
- Summary call details and a second level navigation list in the side pane.

2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear in the main pane.
3. Update an order for an ongoing call as follows:

   a. Start the activity (if not already started) as follows:

      - Select an activity of type Retail Order in the main pane.
      - Tap the Prepare Visit button to create the retail order for the call.
      - Tap the Start Activity button to record the start date and time for the activity.
      - Drill down on the Retail Order link in the Type field.

        The Order - Line Items view appears in the main pane, showing all line items associated with the Retail Order.

   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. After completing an order for the call, end the activity as follows:

   a. Navigate back to the Call Items view and select the activity, of type Order, that you want to end.
   b. Tap the End Activity button to record the end date and time for the activity.
5. Review all the orders associated with the account as follows:

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

      All orders associated with the account appear in the main pane.
   b. To modify an order which has not been billed yet, drill down on the order number link in the Order Number field.

For more information about orders, see *Managing Orders for Siebel Consumer Goods*.

Modifying Note Information for a Call

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

To modify the note information for a call

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

   - Call details and activities in the main pane.
   - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Update an existing note for the call as follows:

   a. Locate the activity that you want of type Note 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.
4. Create a new note for the call as follows:
   a. Tap Notes in the list in the side pane, and then tap New (the plus (+) icon) next to Notes in the main pane.
   b. Enter the information for the new note in the fields that appear, and then save the record.

Modifying Assessment Information for a Call

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

To modify the assessment information for a call

1. Tap Side Menu and then tap Call Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Update an existing assessment for the call as follows:
   a. Locate the activity that you want of type Assessment 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.
4. Create a new call assessment as follows:
   a. Tap Assessments in the list in the side pane, and then tap New (the plus (+) icon) next to Assessments in the main pane.
   b. Enter the information for the new record in the fields that appear, and then save the record.

Viewing Presentation Information for a Call

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

To view the presentation detail information for a call

1. Tap Side Menu and then tap Call Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Tap Presentation Details in the list in the side pane.

All the presentation items (promotions and promotional items) associated with the call appear in the main pane.

> **Note:** You must complete ceratin tasks in Siebel CRM for presentation data to appear in this view. For more information, see *Prerequisites to Viewing Presentation Informationfor a Call*.

The following table describes the presentation detail information.

Field Name	Description
Sequence #	Tracks the presentation items and the order in which the presentation items were shown during the call.
Promotion	The name of the presentation item that was shown during the call.
Duration	The duration in seconds that the presentation item was shown during the call.
Response	The response rating recorded for the presentation item.

4. To show presentations and record responses to presentations, see *Showing Presentations for a Call* and *Recording Responses to Presentations*.

Prerequisites to Viewing Presentation Information for a Call

You must complete the following tasks in Siebel CRM to populate the Presentations Details view in the Siebel Mobile application for Siebel Consumer Goods with presentation items, and to subsequently view the presentation information for a call:

- Create appropriate literature records in Siebel CRM.

  The literature records must be of type Message, where Release Date is less than and Expiration Date is greater than today's date. For more information, see the topics about Creating Literature Records in *Siebel Life Sciences Guide* .

- Associate literature with Account Promotions in Siebel CRM.

  For more information, see the topic about Attaching Literature to Promotions in *Siebel Consumer Goods Handheld Guide* . For more information about working with literature in Siebel Business Applications, see *Siebel Applications Administration Guide* .

- Configure the server location path where you want to store file contents (presentation items, ZIP files, and so on).

  You do this by setting the following system preferences in Siebel CRM (in the Administration - Application screen, then the System Preferences view):

System Preference Name	System Preference Value
Decompressed Files Path	`filesystem\assets`
Server Uncompression Location	`AI_INSTALL\applicationcontainer_external\siebelwebroot`

Showing Presentations for a Call

Complete the following procedure to show presentations for a call in the Siebel Mobile application for Siebel Consumer Goods.

To show presentations for a call

1. Tap Side Menu and then tap Call Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details and a second level navigation list in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Create an activity of type eMerchandising, and then tap the Start Activity button to record the start date and time for the activity.
4. Drill down on the eMerchandising link in the Type field.

   All the promotional items associated with the call appear in the main pane.
5. Tap the Generate button to open and uncompress the presentation.

   After you uncompress a presentation, all the presentation items appear in the main pane (in thumbnail format).
6. Tap the Launch button to go to the Player view, where you can start showing the presentation.
7. Use the Next and Previous arrows to scroll through the presentation.

Recording Responses to Presentations

Complete the following procedure to record responses to presentations for calls in the Siebel Mobile application for Siebel Consumer Goods.

To record responses to presentations for calls

1. Tap Done in the Player view when you have finished showing the presentation.

   The Feedback page opens showing the list of contacts who attended the presentation session. By default the account's primary contact appears first. 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.

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.

   b. For contact calls, capture the individual ratings for each attendee on the call as follows:

      - Tap a contact in the Contact list.
      - Tap the appropriate number of stars after each presentation item.

      For account calls, you cannot capture the individual ratings for attendees; you can capture the ratings for the account's primary contact only.
   c. If required, tap Suspend to save all response ratings logged so far and exit the Feedback page.
   d. Tap Submit when you have recorded all feedback.

      The response ratings are logged under Presentation Details for the call. For more information, see *Viewing Presentation Information for a Call*.

Managing Contacts for Siebel Consumer Goods

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

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

- *Displaying Contact Details (Siebel Consumer Goods)*
- *Modifying Contact Information*
- *Modifying Address Information for a Contact*
- *Modifying Best Time Information for a Contact*

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

Displaying Contact Details

You can display contact details by using the Contacts view.

To display contact details

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

- The Contacts list and details in the main pane or work area.
  Contact Address and Best Time information appears after the contact details.
- The calendar in the side pane showing the call scheduling information.

2. Navigate to the contact that you want in the Contacts list.
   All details for the selected contact appear after the list in the main pane.

Modifying Contact Information

Complete the following procedure to modify contact information.

To modify contact information

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details in the main pane.
     Contact Address and Best Time information appears after the contact details.
   - The calendar in the side pane showing the call scheduling information.
2. Update an existing contact as follows:
   a. Navigate to the contact that you want 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 Address Information for a Contact

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

To modify the address information for a contact

1. Tap Side Menu and then tap Contacts to display the following:
   - The Contacts list and details in the main pane.
     Contact Address and Best Time information appears after the contact details.
   - The calendar in the side pane showing the call scheduling information.
2. Navigate to the contact that you want 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 the down arrow next to Address in the main pane.

       All the addresses associated with the contact 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.
4. Add an existing address to the contact as follows:
    a. Tap New (the plus (+) icon) next to Addresses in the main pane.
    b. Choose the address on the list that appears, and then tap OK.
5. Create a new contact address as follows:
    a. Tap New next to Addresses 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.

Modifying Best Time Information for a Contact

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

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

To modify the best time information for the contact

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

      Contact Address and Best Time information appears after the contact details.
    - The calendar in the side pane showing the call scheduling information.
2. Navigate to the contact that you want 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 the down arrow next to Best Times in the main pane.

       All the best times associated with the contact 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.
4. Create a new contact best time as follows:
    a. Tap New (the plus (+) icon) next to Best Times in the main pane.

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

Managing Accounts for Siebel Consumer Goods

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

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

- *Displaying Account Details (Siebel Consumer Goods)*
- *Modifying Asset Information for an Account*
- *Viewing Agreement Information for an Account*
- *Modifying Address Information for an Account*
- *Viewing Credit Memo Information for an Account*
- *Modifying Note Information for an Account*
- *Modifying Merchandising Location Information for an Account*
- *Modifying Contact Information for an Account*
- *Modifying Product Distribution Information foran Account*
- *Modifying Order Information for an Account*
- *Viewing Invoice Information for an Account*
- *Modifying Return Information for an Account*
- *Modifying Activity Information for an Account*
- *Associating Products to the Merchandising Locations of an Account*

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

Displaying Account Details

You can display account details by using the Accounts view.

To display account details

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane or work area.
   - The calendar in the side pane showing the call scheduling information.
2. In the Accounts list, drill down on a link in the Account field to open that account record.

   All details for the selected account appear in the main pane, including:
   - The following information (if any) associated with the contact:

- **Assets.** Tap to show the asset information for the account. For more information, see *Modifying Asset Information for an Account*.
- **Agreements.** Tap to show the agreement information for the account. For more information, see *Viewing Agreement Information for an Account*.
- **Addresses.** Tap to show the address information for the account. For more information, see *Modifying Address Information for an Account*.
- **Credit Memos.** Shows credit memo information for the account. For more information, see *Viewing Credit Memo Information for an Account*.
- **Notes.** Tap to show the note information for the account. For more information, see *Modifying Note Information for an Account*.
- **Merchandising Locations.** Tap to show the merchandising location information for the account. For more information, see *Modifying Merchandising Location Information for an Account*.

- A Side Menu containing the following options:

  - **Contacts.** Shows the contact information for the account. For more information, see *Modifying Contact Information for an Account*.
  - **Product Distribution.** Shows the product distribution information for the account. For more information, see *Modifying Product Distribution Information foran Account*.
  - **Orders.** Shows the order information for the account. For more information, see *Modifying Order Information for an Account*.
  - **Invoices.** Shows the invoice information for the account. For more information, see *Viewing Invoice Information for an Account*.
  - **Returns.** Shows the return order information for the account. For more information, see *Modifying Return Information for an Account*.
  - **Activities.** Shows the call activity for the account. For more information, see *Modifying Activity Information for an Account*.
  - **Products.** Shows the product-to-merchandising location associations for the account. For more information, see *Associating Products to the Merchandising Locations of an Account*.

3. To go to a different account, use the navigation arrows in the main pane.

Modifying Asset Information for an Account

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

To modify the asset information for an account

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

   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.

2. Drill down on a link in the Account field to open that account record.

   All details for the selected account appear in the main pane.

3. Update an existing account asset as follows:

   a. Tap the down arrow next to Assets in the main pane.

All assets associated with the account 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.

4. Create a new account asset as follows:
   a. Tap New (the plus (+) icon) next to Assets in the main pane.
   b. Enter the information for the new asset in the fields that appear, and then save the record.

Viewing Agreement Information for an Account

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

To view the agreement information for an account

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.
   All details for the selected account appear in the main pane.
3. Tap the down arrow next to Agreements in the main pane.
   All the agreements associated with the account appear in the main pane.

Modifying Address Information for an Account

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

To modify the address information for an account

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.
   All details for the selected account appear in the main pane.
3. Tap an account in the Accounts list.
   All details for the selected account appear in the main pane.
4. Update an existing account address as follows:
   a. Tap the down arrow next to Addresses in the main pane.
   All the addresses associated with the account 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.

5. Add an existing address to the account as follows:
   a. Tap New (the plus (+) icon) next to Addresses in the main pane.
   b. Choose the address on the list that appears, and then tap OK.
6. Create a new account address as follows:
   a. Tap New next to Addresses 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.

Viewing Credit Memo Information for an Account

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

To view the credit memo information for an account

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.
   All details for the selected account appear in the main pane.
3. Tap the down arrow next to Credit Memos in the main pane.
   All the credit memos associated with the account appear in the main pane.

Modifying Note Information for an Account

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

To modify the note information for an account

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.
   All details for the selected account appear in the main pane.
3. Update an existing account note as follows:
   a. Tap the down arrow next to notes in the main pane.
      All the notes associated with the account 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.

4. Create a new account note as follows:
   a. Tap New (the plus (+) icon) next to Notes in the main pane.
   b. Enter the information for the new note in the fields that appear, and then save the record.

Modifying Merchandising Location Information for an Account

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

To modify the merchandising location information for an account

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.
   All details for the selected account appear in the main pane.
3. Update an existing account merchandising location as follows:
   a. Tap the down arrow next to Merchandising Locations in the main pane.
      All the merchandising locations associated with the account 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.
4. Create a new account merchandising location as follows:
   a. Tap New (the plus (+) icon) next to Merchandising Locations in the main pane.
   b. Enter the information for the new merchandising location in the fields that appear, and then save the record.

Modifying Contact Information for an Account

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

To modify the contact information for an account

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.
   All details for the selected account appear in the main pane.

3. Update an existing account contact as follows:
    a. Select Contacts from the Side Menu in the main pane.

       All the contacts associated with the account 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.
4. Add an existing contact to the account as follows:
    a. Select Contacts from the Side Menu in the main pane, and then tap New (the plus (+) icon) next to Contacts in the main pane.
    b. Choose the contact on the list that appears, and then tap OK.
5. Create a new contact for the account as follows:
    a. Select Contacts from the Side Menu in the main pane, tap New next to Contacts, 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 navigate away from the record to save it.
    c. Drill down on the link in the Last Name field to see more information about the contact.

Modifying Product Distribution Information for an Account

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

To modify the product distribution information for an account

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.

   All details for the selected account appear in the main pane.
3. Update the product distribution information as follows:
    a. Select Product Distribution from the Side Menu in the main pane.

       All the product distributions associated with the account 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.
4. To add a new product for distribution:
    a. Select Product Distribution from the Side Menu in the main pane, and then tap New (the plus (+) icon) next to Product in the main pane.

       All the product distributions associated with the account appear in the main pane.
    b. Enter the information for the new product for distribution in the fields that appear, and then save the record.

Modifying Order Information for an Account

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

To modify the order information for an account

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.

    All details for the selected account appear in the main pane.
3. Update an existing order for the account as follows:
    a. Select Orders from the Side Menu in the main pane.

    All orders associated with the account 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.
4. Create a new order for the account as follows:
    a. Select Orders from the Side Menu in the main pane, and then tap New (the plus (+) icon) next to Order in the main pane.
    b. Enter the information for the new order in the fields that appear, and then save the record.
    c. Tap the link in the Order # field to go to:
        - The Orders view for orders of type Sales Order. For more information see, *Managing Orders for Siebel Consumer Goods*.
        - The Return Order view for orders of type Service Order. For more information, see *Managing Return Orders for Siebel Consumer Goods*.

Viewing Invoice Information for an Account

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

To view the invoice information for an account

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.

    All details for the selected account appear in the main pane.
3. Select Invoices from the Side Menu in the main pane.

All the invoices associated with the account appear in the main pane.

4. Tap the link in the Invoice # field to open and review the invoice details.

Modifying Return Information for an Account

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

To modify the return information for an account

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.
   All details for the selected account appear in the main pane.
3. Update an existing return order for the account as follows:
   a. Select Returns from the Side Menu in the main pane.
      All the returns associated with the selected account 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.
4. Create a new return order for the account as follows:
   a. Select Returns from the Side Menu in the main pane, and then tap New (the plus (+) icon) next to Returns in the main pane.
   b. Enter the information for the new return order in the fields that appear, and then save the record.
   c. Drill down on the link in the RMA # field.
      The return order detail view opens. For more information, see *Managing Return Orders for Siebel Consumer Goods*.

Modifying Activity Information for an Account

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

To modify the activity information for an account

1. Tap Side Menu and then tap Accounts to display the following:
   - The Accounts list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.
   All details for the selected account appear in the main pane.

3. Update an existing activity for the account as follows:
    a. Select Activities from the Side Menu in the main pane.

       All the activities associated with the account 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.
4. Create a new activity for the account as follows:
    a. Select Activities from the Side Menu in the main pane, and then tap New (the plus (+) icon) next to Activity in the main pane.
    b. Enter the information for the new activity in the fields that appear, and then save the record.

Associating Products to the Merchandising Locations of an Account

Complete the following procedure to associate products to the merchandising locations of an account.

To associate products to the merchandising locations of an account

1. Tap Side Menu and then tap Accounts to display the following:
    - The Accounts list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Account field to open that account record.

   All details for the selected account appear in the main pane.
3. Update an existing product-to-merchandising location association as follows:
    a. Tap the down arrow next to Merchandising Locations in the main pane, and then select the merchandising location record that you want.
    b. Select Products from the Side Menu in the main pane.

       All the products associated with the selected merchandising location appear in the main pane.
    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 product-to-merchandising location association for the account as follows:
    a. Tap the down arrow next to Merchandising Locations in the main pane, and then select the merchandising location record that you want.
    b. Select Products from the Side Menu in the main pane, and then tap New (the plus (+) icon) on the screen that appears.
    c. Enter the information for the new product in the fields that appear, and then save the record.

Managing Routes for Siebel Consumer Goods

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

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

- *Displaying Route Details*

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

Displaying Route Details

You can display route details by using the Routes view.

To display route details

1. Tap Side Menu and then tap Routes to display the following:
   - The Routes list and details in the main pane or work area.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Route Name field to open that route record.

   All accounts associated with the route appear in the main pane after the route details.

Managing Orders for Siebel Consumer Goods

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

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

- *Creating Sales Orders*
- *Displaying Order Details (Siebel Consumer Goods)*
- *Modifying Order Details*
- *Modifying Line Item Information for Orders*
- *Creating Invoices for Orders*
- *Booking Orders*
- *Printing Orders*

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

Creating Sales Orders

Complete the following procedure to create a sales order.

To create a sales order

1. Navigate to the Call Items view.

   Tap Side Menu and then tap Calls Items to display the following:

   - Call details and activities in the main pane.
   - Summary call details in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.

   All activities for the call appear after the call details in the main pane.
3. Create a new record activity, of type Retail Order, as follows:

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

      - In the Type field, select Retail Order from the drop-down menu.
      - In the Description field, type in a description for the retail order.

   c. Tap Start Activity.

      A new retail order is created.
   d. Drill down on the Retail Order link in the Type field to open the retail order in the Orders view.
4. In the Orders view, enter the order details by creating line items as follows:

   a. Tap New (the plus (+) icon next) to Line Items in the main pane.
   b. Enter the information for the order line item in the fields that appear, and then save the record.

      The products available in the Products drop-down menu are taken from the distribution list for the particular account.
5. When the order is complete, tap Invoice to create an invoice for the order.

   For more information, see *Creating Invoices for Orders* and *Booking Orders*.
6. End the (Retail Order) activity as follows:

   - Go back to the Call Items view.
   - Navigate to the call, and then and select the activity that you want to end.
   - Tap End Activity in the main pane.

   When finished with a particular activity, you typically end the activity. For example, after you create an invoice for the activity, obtain a printout of the activity, and capture a signature for the activity, then you can end the activity.

Displaying Order Details

You can display order details by using the Orders view.

To display order details

1. Tap Side Menu and then tap Orders to display the following:
   - The Orders list and details in the main pane or work area.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Order Number field to open that order record.

   All line items associated with the order appear in the main pane.
3. You can perform the following tasks from this view:
   - *Modifying Line Item Information for Orders*
   - *Creating Invoices for Orders*
   - *Booking Orders*
   - *Printing Orders*

Modifying Order Details

You can modify order details by using the Orders view.

To display order details

1. Tap Side Menu and then tap Orders to display the following:
   - The Orders list and details in the main pane or work area.
   - The calendar in the side pane showing the call scheduling information.
2. To update an existing order, tap the record field that you want to update in the main pane, 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.

      The following table describes some of the order fields.

Field Name	Description
Order Date	Displays the date the order was created.

Field Name	Description
Order Number	Displays the order number.
Type	Displays the order type, such as, RMA Return and RMA Exchange.
Status	Displays the status of the order. For example: Pending, New, Open, Booked, In-Transit, Shipped, Billed, Active, Paid, Closed, and so on.
Account	Select an account to associate the order to.
Location	Displays the account's site location. This field fills in after you choose an account.
Price List	Select a price list to associate with the order.
Tax List	Select a tax list to associate with the order.
Priority	Select a priority (High, Medium, Low, Urgent) for he order.
Discount Percent	Select a discount to associate with the order if applicable.

Modifying Line Item Information for Orders

Complete the following procedure to modify the order detail (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 in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Order Number field to open that order record.
   All line items associated with the order appear in the main pane.
3. To update an existing order line item, tap the record field that you want to update, and then update the field value.
4. Create a new order line item as follows:
   a. Tap New (the plus (+) icon) next to Line Items in the main pane.
   b. Enter the information for the new order line item in the fields that appear, and then save the record.

Creating Invoices for Orders

Complete the following procedure to create an invoice for an order in the Siebel Mobile application for Siebel Consumer Goods.

To create an invoice for an order

1. Tap Side Menu and then tap Orders to display the following:
    - The Orders list and details in the main pane.
    - The calendar in the side pane showing call scheduling information.
2. Drill down on a link in the Order Number field to open that order record.

    All line items associated with the order appear in the main pane.
3. Tap Invoice in the main pane to create an invoice for the order.

    When you tap Invoice, each order line item is checked to see whether there is sufficient stock available to fulfill the order. If insufficient stock is available to fulfill the order, then an error message similar to the following appears:

    ```
    The quantity of Product <name> you ordered exceeds the number in stock. The maximum quantity you can order is <n>.
    ```

    If sufficient stock is available to fulfill the order, then the following happens:

    - Each order line is checked to verify that the total does not exceed the available credit. If the order total is greater than the available credit, then a warning message appears stating same.
    - The value in the Status field for the order changes to Billed.
    - All line items of zero-quantity are removed.
    - An invoice is created for the order.

Booking Orders

Complete the following procedure to book an order, which means that the order is booked but not billed. Invoices for the order will be processed at a later date.

To book an order

1. Tap Side Menu and then tap Orders to display the following:
    - The Orders list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Order Number field to open that order record.

    All line items associated with the order appear in the main pane.
3. Tap Book in the main pane to book the order.

The value in the Status field for the order changes to Booked.

4. (Optional) Tap Open to open and review the details of the booked order.

   A booked order has not been billed yet (that is, no invoice has been created for it).

Printing Orders

Complete the following procedure to print an order in the Siebel Mobile application for Siebel Consumer Goods.

> **Note:** The print capability in the Siebel Mobile application for Siebel Consumer Goods is built using third-party open source embedded javascript (http://embeddedjs.com) and uses MIT licensing. For more information, see *MIT License*.

To print an order

1. Tap Side Menu and then tap Orders to display the following:
   - The Orders list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Order Number field to open that order record.

   All line items associated with the order appear in the main pane.
3. Tap Print Preview to preview the order details.
4. Tap Print to print the return order.

Managing Return Orders for Siebel Consumer Goods

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

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

- *Collecting Returns (Creating Return Orders)*
- *Displaying Return Order Details*
- *Modifying Return Order Information*
- *Modifying Line Item Information for Return Orders*
- *Capturing Signatures for Return Orders*
- *Printing Return Orders*

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

Collecting Returns (Creating Return Orders)

Van sales representatives typically check to see if customers have returned items. If so, a Return Merchandising Authorization (RMA) order must be generated. Complete the following procedure to collect returns (create return orders).

To collect returns

1. Navigate to the Call Items view.
   Tap Side Menu and then tap Calls Items to display the following:
   - Call details and activities in the main pane.
   - Summary call details in the side pane.
2. Navigate to the call that you want using the navigation arrows in the main pane.
   All activities for the call appear after the call details in the main pane.
3. Create a new record activity, of type Return Order or RMA Return, as follows:
   a. Tap New (the plus (+) icon) next to Activity in the main pane.
   b. Enter the information for the activity in the fields that appear, and then save the record.
      - In the Type field, select Return Order or RMA Return for example from the drop-down menu.
      - In the Description field, type in a description for the return order.
   c. Tap Start Activity.
      A new return order is created.
   d. Drill down on the Return Order link in the Type field to open the return order in the Returns view.
4. In the Returns view, enter the return order details by creating line items as follows:
   a. Tap New (the plus (+) icon) next to Return Order Line Items in the main pane.
   b. Enter the information for the new return order line item in the fields that appear, and then save the record.
      Line items are not limited to the authorized product distribution list. You can add any product that is available on your mobile device as a listed product, including discontinued products.
5. In the Returns view, tap Credit when you have finished adding return order line items.
   When you tap Credit, the following happens:
   - The value in the return order's Status field changes to Billed.
   - A Credit Note is created for the return order account.
   - An invoice is created for the return order.
   - The Invoices view opens showing the invoice for the return order.
6. In the Invoices view, tap Deliver.
   When you tap Deliver, the following happens:
   - The value in the invoice's Status field changes to Closed.
   - A Credit Memo is created for the return order account.

- The inventory is updated.

7. End the (Return Order) activity as follows:
   - Go back to the Call Items view.
   - Navigate to the call, and then select the activity that you want to end.
   - Tap End Activity in the main pane.

     After you have collected all the returned products from a particular activity, then you can end the activity.

Displaying Return Order Details

You can display return order details by using the Returns view.

To display return order details

1. Tap Side Menu and then tap Returns to display the following:
   - The Returns list and details in the main pane or work area.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Order Number field to open that return order record.

   All line items associated with the return order appear in the main pane.

   You can perform the following tasks from this view:
   - *Modifying Return Order Information*
   - *Modifying Line Item Information for Return Orders*
   - *Capturing Signatures for Return Orders*
   - *Printing Return Orders*

Modifying Return Order Information

Complete the following procedure to modify return order information.

To modify return order information

1. Tap Side Menu and then tap Returns to display the following:
   - The Returns list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. To update an existing return order, tap the record field that you want to update in the main pane, and update the field value.

   You must navigate away from the record to save your changes to it.
3. Create a new return order as follows:

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

The following table describes some of the return order fields.

Field Name	Description
Order Date	Displays the date the order was created.
Order Number	Displays the order number.
Type	Displays the order type, such as, RMA Return and RMA Exchange.
Status	Displays the status of the order. For example: Pending, New, Open, Booked, In-Transit, Shipped, Billed, Active, Paid, Closed, and so on.
Account	Select an account to associate the order to.
Location	Displays the account's site location. This field fills in after you choose an account.
Price List	Select a price list to associate with the order.
Tax List	Select a tax list to associate with the order.
Priority	Select a priority (High, Medium, Low, Urgent) for he order.
Discount Percent	Select a discount to associate with the order if applicable.

Modifying Line Item Information for Return Orders

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

To modify the line item information for a return order

1. Tap Side Menu and then tap Returns to display the following:
   - The Returns list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.

2. Update an existing return order line item as follows:
    a. Drill down on a link in the Order Number field to open that return order record.

       All return order line items associated with the record 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.
3. Create a new return order line item as follows:
    a. Tap New (the plus (+) icon) in the main pane.
    b. Enter the information for the new return order line item in the fields that appear, and then save the record.

Capturing Signatures for Return Orders

Complete the following procedure to capture the electronic signature for a return order in the Siebel Mobile application for Siebel Consumer Goods. You capture the signature to verify that the contact reviewed the return order.

Note: Signature display is supported only in online mode.

To capture the electronic signature for a return order

1. Tap Side Menu and then tap Returns to display the following:
    - The Returns list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Order Number field to open that return order record.

   All return order line items associated with the record appear in the main pane. Review the return order line items.
3. Tap Sign.

   Information about the return order and about the contact for the return order appears in the main pane.
4. Capture the signature of the contact in the signature input box.
5. If you make a mistake when capturing the signature, tap Clear to clear the signature and start again.
6. Save the record when finished.

Printing Return Orders

Complete the following procedure to print a return order in the Siebel Mobile application for Siebel Consumer Goods.

Note: The print capability in the Siebel Mobile application for Siebel Consumer Goods is built using third-party open source embedded javascript (http://embeddedjs.com) and uses MIT licensing. For more information, see *MIT License*.

To print a return order

1. Tap Side Menu and then tap Returns to display the following:
    - The Returns list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Order Number field to open that return order record.

   All return order line items associated with the record appear in the main pane.
3. Tap Print Preview to preview the return order details.
4. Tap Print to print the return order.

Managing Inventory for Siebel Consumer Goods

Sales representatives, presales representatives, and delivery representatives often capture orders, invoice, collect payments, and perform retail audits. All these activities are part of the inventory and order management process.

The following procedures related to inventory management are included in this topic:

- *Displaying Inventory Details*
- *Recording Van Information*
- *Viewing Reconciliation Information for the Inventory*

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

Displaying Inventory Details

You can display inventory details by using the Inventory view.

To display inventory details

1. Tap Side Menu and then tap Inventory to display the following:
    - The Inventory details in the main pane or work area.

      A list of all products in the van appears after the inventory details.
    - The calendar showing call scheduling information and a second level navigation list in the side pane.
2. Navigate to the inventory record that you want using the navigation arrows in the main pane.

   All details for the selected inventory appear in the main pane.
3. Navigate to the following inventory related information using the second level navigation list in the side pane:
    - **Vehicle Details.** Tap to show the details of the van associated with the selected inventory. For more information, see *Recording Van Information*.
    - **Reconciliation.** Tap to show the reconciliation information for each product in the van. For more information, see *Viewing Reconciliation Information for the Inventory*.

> **Note:** You configure second level navigation views in Siebel Tools. For more information, see *About the Siebel Mobile Aurora and Zante UI Themes*.

Recording Van Information

Before leaving the depot, a van sales representative verifies the van identification information and records the van's mileage.

To record van information

1. Tap Side Menu and then tap Inventory to display the following:
   - The Inventory details in the main pane.

     A list of all products in the van appears after the inventory details.
   - The calendar showing call scheduling information and a second level navigation list in the side pane.
2. Navigate to the inventory record that you want using the navigation arrows in the main pane.

   All details for the selected inventory appear in the main pane.
3. Verify that the values in the following fields of the inventory record are correct:
   - Van Plate Number
   - Serial Number
4. Add a new mileage reading for the van as follows:
   a. Tap Vehicle Details in the list in the side pane, and then tap New (the plus (+) icon) in the main pane.
   b. Enter the van's current mileage in the Reading field, and then save the record.

      The following table describes the other fields, which are mostly read-only.

Field Name	Description
Reading	Enter the van's current mileage.
U/M	The unit of measure specified when the asset is set up.
Time Taken	The time that you not the mileage. This time might be before or at the time that you create the record.
Reading #	A unique ID number for each reading.
Created	The time that you create the record.
Created By	The name of the person who creates the record.

Field Name	Description
Complete	Check box indicating whether the reading has been committed (checked) or not (unchecked).

c. Tap the Complete check box to commit the reading when you complete it.

Viewing Reconciliation Information for the Inventory

Delivering products, taking returns, and exchanging products with other representatives all impact the inventory. Periodically during the day, sales representatives can check to be sure that the inventory properly reflects all these changes.

To view the reconciliation information for the inventory

1. Tap Side Menu and then tap Inventory to display the following:
   - The Inventory details in the main pane.

     A list of all products in the van appears after the inventory details.
   - The calendar showing call scheduling information and a second level navigation list in the side pane.
2. Navigate to the inventory record that you want using the navigation arrows in the main pane.

   All details for the selected inventory appear in the main pane.
3. Tap Reconciliation in the list in the side pane.

   Review the reconciliation information for each product in the van. This information is read-only.

Managing Cycle Counting for Siebel Consumer Goods

Before visiting outlets, van sales representatives must verify that the inventory on their mobile device matches the actual inventory in their van. Inventory is verified by performing a cycle count.

The following procedures related to cycle counting are included in this topic:

- *Displaying Cycle Counts*
- *Performing a Cycle Count*
- *Adding Products to the Cycle Count*

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

Displaying Cycle Counts

You can display cycle counts by using the Cycle Count view.

To display cycle counts

- Tap Side Menu and then tap Cycle Counting to display the following:
  - The Cycle Count list and details in the main pane or work area.
  - The calendar in the side pane showing the call scheduling information.

  The following table describes the fields in the Cycle Count list.

Field Name	Description
Status	The cycle count status, which can be one of the following: Assigned, Closed, Done, In Progress, Open, or Scheduled. Drill down on the link in the Status field to see the product information for the cycle count and to perform a cycle count. For more information, see *Performing a Cycle Count* and *Adding Products to the Cycle Count*.
Inv Location	The location of the inventory associated with the cycle count. Drill down on the link in the Inv Location field to see the details of the inventory location for the cycle count.
Due Date	The date that the cycle count is due.
Start Date #	The cycle count start time.
End Date	The cycle count end time.
Comments	The cycle count description.

Performing a Cycle Count

Van sales representatives verify their inventory by performing a cycle count.

To perform a cycle count

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

- The Cycle Count list and details in the main pane.
- The calendar in the side pane showing the call scheduling information.

2. Select a cycle count record for the current date and time in the Cycle Count list.

   Alternatively, tap New (the plus (+) icon) in the main pane to create a new cycle count.
3. To perform the cycle count:
   a. Tap the Start button in the main pane.

      Tapping Start records the start time for the cycle count, changes the value in the Status field to In Progress, and displays the Product information for the cycle count.

      For an existing cycle count that has not been started, drill down on the Open link in the Status field.
   b. Tap the List Products button in the main pane.

      This populates the list of products for the cycle count by returning all products in the current van inventory belonging to the sales representative. This includes various product buckets such as Good, Defective, and so on.
   c. Verify the count of stock in your van and then enter the amounts of each item in the Count column.

      > **Note:** You can also use the Count UOM1 and Count UOM2 fields to capture the count of the physical inventory. These fields represent two units of measure that are related by Case Pack, which is a value that the administrator sets up. Updates to the Count UOM1 and Count UOM2 fields also update the Count when it is committed based on the Case Pack.

   d. Tap Count Complete when you are finished entering the inventory amounts.

      The records are locked, preventing any further changes.
   e. If there are products with variances greater or less than zero, then select those products and tap the Adjust button to update the inventory with the current count.

      The Adjust button processes the selected records only. Uses CTRL+Tap to select multiple records.
4. Finish the cycle count as follows:
   - Tap Side Menu, and then tap Cycle Counting to return to the Cycle Count list.
   - Tap the End button in the main pane.

   The value in the Status field changes from In Progress to Done.

Adding Products to the Cycle Count

Complete the following procedure to add products to a cycle count.

To add products to a cycle count

1. Tap Side Menu and then tap Cycle Counting to display the following:
   - The Cycle Count list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.

2. Drill down on the link in the Status field for the cycle count record that you want to modify.
3. Add new products to the cycle count as follows:
    - Tap the List Products button in the main pane.

      This populates the list of products for the cycle count by returning all products in the current van inventory belonging to the sales representative. This includes various product buckets such as Good, Defective, and so on.
    - Tap New (the plus (+) icon) in the main pane.
    - Enter the information for the new product in the fields that appear, and then save the record.

      Only products that are in the current van inventory belonging to the sales representative can be added.

Managing Deposits for Siebel Consumer Goods

As a Van Sales representative, you might want to deposit payments you have collected during the day or view a history of all the deposits that you made. When you do so, you can record or review the information on your mobile device.

The following procedures related to deposits and deposit management are included in this topic:

- *Displaying Undeposited Payments*
- *Depositing Payments*
- *Viewing Deposit History*

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

Displaying Undeposited Payments

From the Deposits view, sales representatives see a list of undeposited payments collected during the business day and a deposit history list of deposits made.

To display undeposited payments

1. Tap Side Menu and then tap Deposits to display the following:
    - The Deposits view showing the deposit account details, the Undeposited Payments list, and the Deposited History list in the main pane or work area.
    - The calendar in the side pane showing the call scheduling information.
2. Navigate to the deposit account that you want using the Next and Previous buttons in the main pane.

   All details for the selected deposit account appear in the main pane.

Depositing Payments

You deposit a payment by using the Deposits view. From the Deposits view, sales representatives select undeposited payment records and generate an actual deposit, creating a link between payment and deposit.

To deposit payments

1. Tap Side Menu and then tap Deposits to display the following:
    - The Deposits view showing the deposit account details, the Undeposited Payments list, and the Deposited History list in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. To deposit a payment:
    a. Navigate to the deposit account that you want using the Next and Previous buttons in the main pane.

    All details for the selected deposit account appear in the main pane.
    b. Tap the down arrow next to Undeposited Payments in the main pane, and then select a record from the Undeposited Payments list.

    Select one or more records as required. Select a record by selecting the check box in the Select field. Use Select All to select all records. Use Deselect All to deselect all records.
    c. Tap New (the plus (+) icon) in the main pane and then enter the following information about where you want to deposit the payment as required:

    Bank Account Number, Bank Check Number, Bank Name (this is a required field), Bank Routing, Comments, and Deposit Date.

    Alternatively, tap Previous and Next in the main pane to navigate to the account where you want to deposit the payment.
    d. Tap Deposit to record the deposit payment.

Viewing Deposit History

The following procedure shows you how to view the deposit history of deposits made. Shows the deposit history information of deposits made. For more information, see the following.

To view the deposit history

1. Tap Side Menu and then tap Deposits to display the following:
    - The Deposits view showing the deposit account details, the Undeposited Payments list, and the Deposited History list in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Navigate to the deposit account that you want using the Next and Previous buttons in the main pane.

    All details for the selected deposit account appear in the main pane.
3. Tap the down arrow next to Deposit History in the main pane.

4. The Deposit History list appears. The Deposit History list is read-only.

Managing Invoices for Siebel Consumer Goods

An *invoice* is a bill to the customer for parts, labor, and other expenses that you incur. Sales representatives review all outstanding invoices, deliver invoices, collect payments, and capture signatures.

The following procedures related to invoice management are included in this topic:

- *Displaying Invoice Details (Siebel Consumer Goods)*
- *Viewing Line Item Information for an Invoice*
- *Viewing Payment Information for an Invoice*
- *Viewing Value Reconciliation Information for an Account*
- *Collecting Invoice Payments*
- *Recording Invoice Delivery*
- *Capturing Signatures for Invoices*
- *Printing Invoices*

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

Displaying Invoice Details

You can display invoice details by using the Invoice view.

To display invoice details

1. Tap Side Menu and then tap Invoices to display the following:
   - The Invoice list and details in the main pane or work area.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Invoice Number field.
   All details for the selected invoice appear in the main pane, which includes line item, payment, and value reconciliation information. For more information, see the following:
   - *Viewing Line Item Information for an Invoice*
   - *Viewing Payment Information for an Invoice*
   - *Viewing Value Reconciliation Information for an Account*

   From the Invoices view, you can do the following to complete a sales order:
   - Tap Deliver to update the inventory details on the order and change the status of the invoice to Delivered. For more information, see *Recording Invoice Delivery*.
   - Tap Pay to initiate payment collection for the invoice. For more information, see *Collecting Invoice Payments*.

- Tap Sign to capture a signature for the invoice. For more information, see *Capturing Signatures for Invoices*.
- Tap Cancel to cancel the invoice. When you cancel an invoice, the value in the Status field changes to Cancelled.
- Tap Print Preview to preview and print the invoice. For more information, see *Printing Invoices*.

Viewing Line Item Information for an Invoice

Complete the following procedure to view the line item information for an invoice.

To view the line item information for an invoice

1. Tap Side Menu and then tap Invoices to display the following:
   - The Invoice list and details in main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Invoice Number field to open that invoice.

   All details for the selected invoice appear in the main pane.
3. Tap the down arrow next to Line Item in the main pane.

   All the line items associated with the invoice appear in the main pane.

Viewing Payment Information for an Invoice

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

To view the payment information for an invoice

1. Tap Side Menu and then tap Invoices to display the following:
   - The Invoice list and details in main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Invoice Number field to open that invoice.

   All details for the selected invoice appear in the main pane.
3. Tap the down arrow next to Payment in the main pane.

   All payments associated with the invoice appear in the main pane.

Viewing Value Reconciliation Information for an Account

Complete the following procedure to view the value reconciliation information for an account.

To view the value reconciliation information for an account

1. Tap Side Menu and then tap Invoices to display the following:
    - The Invoice list and details in main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Invoice Number field to open that invoice.

   All details for the selected invoice appear in the main pane.
3. Tap the down arrow next to Value Reconciliation in the main pane.

   Review the figures on the Value Reconciliation report that appears.

Recording Invoice Delivery

Complete the following procedure to record the delivery of an invoice. Delivering an invoice prompts an inventory reconciliation to be carried out.

To deliver an invoice

1. Tap Side Menu and then tap Invoices to display the following:
    - The Invoice list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Invoice Number field to open that invoice.

   All details for the selected invoice appear in the main pane.
3. Tap Deliver to record delivery of the invoice.

   The status on the invoice changes to Delivered, and the inventory details on the order are updated as required (according to the invoice line items).

Collecting Invoice Payments

Complete the following procedure to collect the payment for an invoice.

To collect invoice payments

1. Tap Side Menu and then tap Invoices to display the following:
    - The Invoice list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Invoice Number field to open that invoice.

   All details for the selected invoice appear in the main pane.
3. Tap Pay in the main pane.

The Payments view opens showing the invoice details (with Pay, Print Preview, Cancel, Deliver, and Visit Home buttons) followed by the payments associated with the invoice.

4. Tap Pay to initiate payment collection for the invoice.

   A Payment form for the payment record appears in the main pane.

   To pay an invoice, you can either collect a new payment from the customer or use an existing credit source to pay the invoice.

   a. To collect a new payment from the customer, do the following:
      - Tap New (the plus (+) icon) on the payment form to create a new payment record.
      - In the Method field, choose a payment type (for example: Automatic Debit, Check, Check, Wire Transfer, Cash, and so on).
      - In the Apply to Invoice field, type in the payment amount.

        The Payment Total field defaults to the amount outstanding for the invoice. The Apply to Invoice field determines what is applied to the invoice. The amount applied to the invoice cannot be greater than the amount outstanding on the invoice.
      - Tap Commit.

        A new payment record is created and the record automatically appears in the Payment list on the Invoices page. The value in the invoice Status field changes to either Paid or Partially Paid.

   b. If an existing credit source exists (such as an open credit memo or residual payment credited to the customer), then the Payment form is prepopulated with the information and you do the following:
      - In the New Amount field, type in the amount to apply to the invoice.
      - Tap OK.
      - Tap Commit.

Capturing Signatures for Invoices

Complete the following procedure to capture the electronic signature for an invoice in the Siebel Mobile application for Siebel Consumer Goods. You capture the signature to verify that the contact reviewed the invoice.

Note: Signature display is supported only in online mode.

To capture the electronic signature for an invoice

1. Tap Side Menu and then tap Invoices to display the following:
   - The Invoice list and details in the main pane.
   - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Invoice Number field to open that invoice.

   All details for the selected invoice appear in the main pane.
3. Tap the down arrow next to Line Item, Payment, and Value Reconciliation to review all the line item, payment and value reconciliation information associated with the invoice.
4. Tap Sign.

Information about the invoice and about the contact for the invoice appears.

5. Capture the signature of the contact in the signature input box.
6. If you make a mistake when capturing the signature, tap Clear to clear the signature and start again.
7. Save the record when finished.

Printing Invoices

Complete the following procedure to print an invoice in the Siebel Mobile application for Siebel Consumer Goods.

Note: The print capability in the Siebel Mobile application for Siebel Consumer Goods is built using third-party open source embedded javascript (http://embeddedjs.com) and uses MIT licensing. For more information, see *MIT License*.

To print an invoice

1. Tap Side Menu and then tap Invoices to display the following:
    - The Invoices list and details in the main pane.
    - The calendar in the side pane showing the call scheduling information.
2. Drill down on a link in the Invoice Number field to open that invoice.

   All details for the selected invoice appear in the main pane.
3. Tap Print Preview to preview the invoice details.
4. Tap Print to print the invoice.

Task Flows for Siebel Consumer Goods

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

- *Performing Daily Tasks for Siebel Consumer Goods*
- *Performing Supplemental Tasks for Siebel Consumer Goods*

Performing Daily Tasks for Siebel Consumer Goods

Field representatives typically perform the following tasks in the following approximate order:

1. Before you start your calls for the day, review and check the calls that are scheduled. For more information, see the following:
    - *Viewing Call Planning Information on the Calendar*
    - *Scheduling Calls for Accounts*
2. When you arrive at a call destination, review the call information, required activities, optional activities, and all other call related information. For more information, see the following:
    - *Displaying Call Details (Siebel Consumer Goods)*

- *Starting a Call*
- *Modifying Activity Information for a Call*

3. One of your assigned activities might be to conduct a retail audit or a merchandising audit. For more information, see the following:
   - *Modifying Retail Audit Information for a Call*
   - *Modifying Merchandising Audit Information for a Call*
4. After you have completed a retail audit, you can generate an order to restock the inventory. When complete, the order is transmitted to the distributor for fulfillment. For more information, see the following:
   - *Modifying Order Information for a Call*
   - *Managing Orders for Siebel Consumer Goods*
5. When done with the call, you can enter notes about the visit, and optionally defer any activity that could not be completed during this visit or enter assessment information for the call. For more information, see the following:
   - *Ending a Call*
   - *Modifying Note Information for a Call*
   - *Modifying Assessment Information for a Call*

Performing Supplemental Tasks for Siebel Consumer Goods

Additional tasks that a field representative might perform throughout the day include the following:

- *Managing Calls for Siebel Consumer Goods*
- *Managing Contacts for Siebel Consumer Goods*
- *Managing Accounts for Siebel Consumer Goods*
- *Managing Routes for Siebel Consumer Goods*
- *Managing Orders for Siebel Consumer Goods*
- *Managing Return Orders for Siebel Consumer Goods*
- *Managing Inventory for Siebel Consumer Goods*
- *Managing Cycle Counting for Siebel Consumer Goods*
- *Managing Deposits for Siebel Consumer Goods*
- *Managing Invoices for Siebel Consumer Goods*

8 Siebel Mobile Application for Siebel Sales

Using the Siebel Mobile Application for Siebel Sales

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

- *Managing Accounts for Siebel Sales*
- *Managing Contacts for Siebel Sales*
- *Managing Leads for Siebel Sales*
- *Managing Opportunities for Siebel Sales*
- *Managing Quotes for Siebel Sales*
- *Managing Orders for Siebel Sales*
- *Managing Activities for Siebel Sales*

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

Managing Accounts for Siebel Sales

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

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

- *Displaying Account Details (Siebel Sales)*
- *Modifying Account Information*
- *Modifying Contact Information for an Account*
- *Modifying Opportunity Information for an Account*
- *Modifying Address Information for an Account*
- *Modifying Activity Information for an Account*
- *Modifying Account Team Information for an Account*

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

Displaying Account Details

You can display account details by using the Accounts list.

To display account details

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 *Modifying Contact Information for an Account*.
    - **Opportunities.** Shows the opportunity information for the account. For more information, see *Modifying Opportunity Information for an Account*.
    - **Addresses.** Shows the address information for the account. For more information, see *Modifying Address Information for an Account*.
    - **Activities.** Shows the activity information for the account. For more information, see *Modifying Activity Information for an Account*.
    - **Account Team.** Shows the account team information for the account. For more information, see *Modifying Account Team Information for an Account*.

Modifying Account Information

Complete the following procedure to modify account information.

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.

Modifying Contact Information for an Account

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

To modify the contact information for an account

1. Tap 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 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.

Modifying Opportunity Information for an Account

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

To modify the opportunity information for an account

1. Tap 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.

Modifying Address Information for an Account

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

To modify the address information for an account

1. Tap 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.
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.

Modifying Activity Information for an Account

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

To modify the activity information for an account

1. Tap 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.

Modifying Account Team Information for an Account

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

To modify the account team information for an account

1. Tap 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.
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.

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

- *Displaying Contact Details (Siebel Sales)*
- *Modifying Contact Information*
- *Modifying Opportunity Information for a Contact*
- *Modifying Contact Team Information for a Contact*
- *Modifying Address Information for a Contact*

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

Displaying Contact Details

You can display contact details by using the Contacts list.

To display contact details

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 *Modifying Opportunity Information for a Contact*.
    - **Contact Team.** Shows the contact team information for the contact. For more information, see *Modifying Contact Team Information for a Contact*.
    - **Addresses.** Shows the address information for the contact. For more information, see *Modifying Address Information for a Contact*.

Modifying Contact Information

Complete the following procedure to modify contact information.

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

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

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.
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.

Modifying Contact Team Information for a Contact

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

To modify the contact team information for a contact

1. Tap 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.
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

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

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.

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.

Managing Leads for Siebel Sales

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

The following procedures related to leads and lead management are included in this topic:

- *Displaying Lead Details (Siebel Sales)*
- *Modifying Lead Information*
- *Modifying Opportunity Information for a Lead*
- *Converting a Lead to an Opportunity*

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

Displaying Lead Details

You can display lead details by using the Leads list.

To display lead details

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 *Modifying Opportunity Information for a Lead*.

Modifying Lead Information

Complete the following procedure to modify lead information.

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

Complete the following procedure to modify the opportunity information for a lead.

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.
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.

Converting a Lead to an Opportunity

When you convert a lead to an opportunity, an opportunity record is automatically created for the lead using data from the lead. For more information about converting leads to opportunities, see *Siebel Marketing User Guide* .

To convert a lead to an opportunity

1. Tap 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.

Managing Opportunities for Siebel Sales

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

The following procedures related to opportunities and opportunity management are included in this topic:

- *Displaying Opportunity Details (Siebel Sales)*
- *Modifying Opportunity Information*
- *Modifying Contact Information for an Opportunity*
- *Modifying Product Information for an Opportunity*
- *Modifying Quote Information for an Opportunity*
- *Converting an Opportunity to a Quote*
- *Modifying Activity Information for an Opportunity*
- *Modifying Opportunity Team Information for an Opportunity*

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

Displaying Opportunity Details

You can display opportunity details by using the Opportunities list.

To display opportunity details

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 *Modifying Contact Information for an Opportunity*.
    - **Products.** Shows the product information for the opportunity. For more information, see *Modifying Product Information for an Opportunity*.
    - **Quotes.** Shows the quote information for the opportunity. For more information, see *Modifying Quote Information for an Opportunity* and *Converting an Opportunity to a Quote*.
    - **Activities.** Shows the activity information for the opportunity. For more information, see *Modifying Activity Information for an Opportunity*.
    - **Opportunity Team.** Shows the opportunity team information for the opportunity. For more information, see *Modifying Opportunity Team Information for an Opportunity*.

Modifying Opportunity Information

Complete the following procedure to modify opportunity information.

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

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

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.
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.

Modifying Product Information for an Opportunity

Complete the following procedure to modify the product information for an opportunity.

To modify the product information for an opportunity

1. Tap 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

Complete the following procedure to modify the quote information for an opportunity.

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.

To convert an opportunity to a quote

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.

Modifying Activity Information for an Opportunity

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

To modify the activity information for an opportunity

1. Tap 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

Complete the following procedure to modify the opportunity team information for an opportunity.

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.
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.

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

- *Displaying Quote Details*
- *Modifying Quote Information*
- *Modifying Line Item Information for a Quote*
- *Modifying Order Information for a Quote*
- *Converting a Quote to an Order*
- *Modifying Quote Team Information for a Quote*

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

Displaying Quote Details

You can display quote details by using the Quotes list.

To display quote details

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 *Modifying Line Item Information for a Quote*.
    - **Orders.** Shows the order information for the quote. For more information, see *Modifying Order Information for a Quote* and *Converting a Quote to an Order*.
    - **Quote Team.** Shows the quote team information for the quote. For more information, see *Modifying Quote Team Information for a Quote*.

Modifying Quote Information

Complete the following procedure to modify quote information.

To modify 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

Complete the following procedure to modify the line item information for a quote.

To modify 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

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

To modify 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* .

To convert a quote to an order

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.

Modifying Quote Team Information for a Quote

Complete the following procedure to modify the quote team information for a quote.

To modify the quote team information for a quote

1. Tap 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 check box. You must navigate away from the record to save your changes to it.
4. Add an existing person to the quote team as follows:
   a. Tap Quote Team in the list in the 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 topic:

- *Displaying Order Details (Siebel Sales)*
- *Modifying Order Information*
- *Modifying Line Item Information for an Order*

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

Displaying Order Details

You can display order details by using the Orders list.

To display order details

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.

The following procedures related to activities and activity management are included in this topic:

- *Displaying Activity Details (Siebel Sales)*
- *Modifying Activity Information*
- *Modifying Contact Information for an Activity*
- *Modifying Employee Information for an Activity*

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

Displaying Activity Details

You can display activity details by using the Activities list.

To display activity details

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 *Modifying Contact Information for an Activity*.
   - **Employees.** Shows the employee information for the activity. For more information, see *Modifying Employee Information for an Activity*.

Modifying Activity Information

Complete the following procedure to modify activity information.

To modify 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

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

To modify 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.
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.

Modifying Employee Information for an Activity

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

To modify the employee information for an activity

1. Tap 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.

9 Siebel Mobile Application for Siebel Field Service

Using the Application for Siebel Field Service

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

- *Using the Home Page for Siebel Field Service*
- *Managing Activities for Siebel Field Service*
- *Managing Service Requests for Siebel Field Service*
- *Managing Accounts for Siebel Field Service*
- *Managing Parts for Siebel Field Service*
- *Managing Orders for Siebel Field Service*
- *Managing Invoices for Siebel Field Service*
- *Managing Assets for Siebel Field Service*
- *Managing Shifts for Siebel Field Service*
- *Tasks Flows for Siebel Field Service*

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

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.

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

- *Navigating to the Home Page (Siebel Field Service)*
- *Reviewing Activity Information*
- *Scheduling Personal Appointments*

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

Navigating to the Home Page

The following procedure shows you how to navigate to the home page of the Siebel Mobile application for Siebel Field Service (if not already displayed).

To navigate to the home page

- 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 *Reviewing 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.

To 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 *Displaying Activity Details (Siebel Field Service)*. For more information about activity icons, see *Navigating to the Home Page (Siebel Field Service)*.

  > **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 *Displaying the Task-Based Screen Flow for an Activity*.
- Schedule a personal appointment. For more information, see *Scheduling Personal Appointments*.

Scheduling Personal Appointments

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

To schedule personal appointments

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

   For more information about the home page, see *Using the Home Page for 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.

The following procedures related to activities and activity management are included in this topic:

- *Displaying Activity Details (Siebel Field Service)*
- *Verifying and Ordering Parts and Tools for an Activity*
- *Viewing Substitute Information for a Part*
- *Accepting an Activity*
- *Displaying the Task-Based Screen Flow for an Activity*
- *Recording Task Completion for an Activity*
- *Capturing Asset Readings for an Activity*

- *Attaching Media to an Activity*
- *Modifying Part Tracker Information for an Activity*
- *Removing a Serialized Part*
- *Installing a Replacement Serialized Part*
- *Modifying Part Tracker for an Activity by Scanning Barcode Data*
- *Modifying Time Tracker Information for an Activity*
- *Modifying Expense Tracker Information for an Activity*
- *Generating Service Reports*
- *Creating Invoices from Activities in Siebel Field Service*
- *Printing Invoices Associated with Activities*
- *Capturing Signatures for Invoices in Siebel Field Service*

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

Displaying Activity Details

You can display activity details by using the calendar on the home page.

To display activity details

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:

   - *Verifying and Ordering Parts and Tools for an Activity*
   - *Viewing Substitute Information for a Part*
   - *Accepting an Activity*

   For more information about the home page, see *Using the Home Page for 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

Complete the following procedure to check part availability in the trunk, and to verify and order 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.

To verify and order parts and tools for an activity

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 *Using the Home Page for 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 does not 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

Complete the following procedure to view the substitute information for a part.

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 *Using the Home Page for 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

Complete the following procedure to accept (or decline) an activity to work upon.

To accept an activity

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 *Using the Home Page for 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 cannot 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

You can display the task-based screen flow for an activity by using the Calendar on the home page. For more information about the home page, see *Using the Home Page for Siebel Field Service*.

To display the task-based screen flow 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.

   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 *Recording Task Completion for an Activity*.
   - **Readings.** See *Capturing Asset Readings for an Activity*.
   - **Photos/Videos.** See *Attaching Media to an Activity*.
   - **Part Tracker.** See *Modifying Part Tracker Information for an Activity*.
   - **Time & Expense.** See *Modifying Time Tracker Information for an Activity* and *Modifying Expense Tracker Information for an Activity*.
   - **Finish.** See *Generating Service Reports*, *Creating Invoices from Activities in Siebel Field Service*, *Printing Invoices Associated with Activities*, and *Capturing Signatures for Invoices in Siebel Field Service*.

   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 *Configuring 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

Complete the following procedure to view and record task completion for an activity. You record task completion to keep track of your work progress on the activity.

To record task completion 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 *Using the Home Page for 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. Complete the following procedure to view, and capture asset readings.

To capture an asset reading 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 *Using the Home Page for 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

Complete the following procedure to attach media (photos or videos) to an activity.

To attach media to 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 *Using the Home Page for 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

Complete the following procedure to modify the part tracker information for an activity and to track and create new activity part movements. You use part tracker to track part movements between locations.

To modify the part 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 *Using the Home Page for 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 is 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 check box to indicate if the part movement is billable. Otherwise deselect this check box.

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.

Removing a Serialized Part

Complete the following procedure to remove a defective serialized part from service. After you complete this procedure, you install a replacement serialized part. For more information, see *Installing a Replacement Serialized Part*.

To 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 *Using the Home Page for 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 is 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 check box to indicate if the part movement is billable. Otherwise deselect this check box.

c. Navigate away from the record to save the record.

4. Tap Menu (the cogwheel icon) in the main pane, and then tap Commit.
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

Complete the following procedure to install a replacement serialized part. Before you complete this procedure, you remove the defective serialized part from service. For more information, see *Removing a Serialized Part*.

To 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 *Using the Home Page for 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 is associated with the part.
Status	Select a value of Good.
Quantity	Type the quantity of the part.
Asset #	Select an asset number to associate with the part.
From	Select a value of Service Order or Trunk.
To	Select a value of Customer.
Billable	Select this check box to indicate if the part movement is billable. Otherwise deselect this check box.

c. Navigate away from the record to save the record.

4. Tap Menu (the cogwheel icon) in the main pane, and then tap Commit.

Modifying Part Tracker for an Activity by Scanning Barcode Data

You can use a barcode reader to update the existing part tracker information for an activity by scanning the part's barcode data or add new part tracker records by scanning the part's barcode data. For more information about barcodes in general and about how to set up the barcode interface for specific views and applets in Siebel CRM, see the chapter about barcodes in *Siebel Field Service Guide* .

To modify part tracker information for an activity by scanning barcode data

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 *Using the Home Page for 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 part tracker record by scanning the barcode data as follows:
   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 as follows:

   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 update assets belonging to the same product only.

   d. Enter other appropriate field values in the new record.

Modifying Time Tracker Information for an Activity

Complete the following procedure to modify the time tracker information for an activity. Time tracker includes information about the time spent working on an activity (for example, travel and labor time). You can include this time in a customer invoice.

Note:

To modify 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 *Using the Home Page for Siebel Field Service*.
2. Tap Time & Expense Tracker in the side pane.

   The Time & Expense Tracker view appears in the main pane showing the time spent working on the activity under Time Tracker, the expenses incurred while working on the activity under Expense Tracker, and the photos associated with the activity under 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.
Billable	Select this check box 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

Complete the following procedure to modify the expense tracker information for an activity. Expense tracker includes information about the expenses that are incurred for the activity. You can include these expenses in a customer invoice.

To modify the expense tracker information for an activity

1. 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 *Using the Home Page for Siebel Field Service*.
2. Tap Time & Expense Tracker in the side pane.

   The Time & Expense Tracker view appears in the main pane showing the time spent working on the activity under Time Tracker, the expenses incurred while working on the activity under Expense Tracker, and the photos associated with the activity under 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 check box 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

Complete the following procedure to generate a service report for an activity.

To generate a service report 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 *Using the Home Page for Siebel Field Service*.
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.

To create an invoice from 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 *Using the Home Page for Siebel Field Service*.
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 check box must be selected on the activity.
4. Tap to preview the invoice details.

   For more information, see *Printing Invoices Associated with Activities*.
5. Tap Sign to obtain a signature for the invoice.

   For more information, see *Capturing Signatures for Invoices in Siebel Field Service*.

Printing Invoices Associated with Activities

Complete the following procedure to print an invoice associated with an activity.

> **Note:** The print invoice capability in the Siebel Mobile application for Siebel Field Service is built using third-party open source embedded JavaScript (http://embeddedjs.com) and uses MIT licensing. For more information, see *MIT License*.

To print an invoice associated with 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 *Using the Home Page for Siebel Field Service*.
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.

To capture the electronic signature for an invoice

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 *Using the Home Page for Siebel Field Service*.
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.

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.

The following procedures related to service requests and service request management are included in this topic:

- *Displaying Service Request Information*
- *Modifying Activity Information for a Service Request*
- *Modifying Order Information for a Service Request*
- *Viewing Invoice Information for Service Requests*
- *Printing Invoices Associated with Service Requests*

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

Displaying Service Request Information

Complete the following procedure to display service request information.

To display service request information

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. Update an existing service request as follows:
    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 cannot modify 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:
    - *Modifying Activity Information for a Service Request*
    - *Modifying Order Information for a Service Request*
    - *Viewing Invoice Information for Service Requests*
    - *Printing Invoices Associated with Service Requests*

Modifying Activity Information for a Service Request

Complete the following procedure to modify the activity information for a service request. You can add a specific activity to a service request that is associated with an account. You can also add a miscellaneous activity, such as depositing funds at a bank or obtaining service work on a truck, to a service request that is not associated with an account.

To modify the activity information for a service request

1. Tap 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 activity as follows:

    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 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.

    You must navigate away from the record to save the record.

Modifying Order Information for a Service Request

Complete the following procedure to modify the order information for a service request.

To modify the order information for a service request

1. Tap 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

Complete the following procedure to view the invoice information for a service request.

To view the invoice 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. 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

Complete the following procedure to print an invoice associated with a service request.

> **Note:** The print invoice capability in the Siebel Mobile application for Siebel Field Service is built using third-party open source embedded JavaScript (http://embeddedjs.com) and uses MIT licensing. For more information, see *MIT License*.

To print an invoice associated with 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. 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.

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

- *Displaying Account Details (Siebel Field Service)*
- *Viewing Contact Information for an Account*

- *Modifying Service Request Information for an Account*
- *Viewing Asset Information for an Account*
- *Viewing Entitlement Information for an Account*

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

Displaying Account Details

You can display account details by using the Accounts list.

To display account details

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:
   - *Viewing Contact Information for an Account*
   - *Modifying Service Request Information for an Account*
   - *Viewing Asset Information for an Account*
   - *Viewing Entitlement Information for an Account*

Viewing Contact Information for an Account

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

To view the contact information for an account

1. Tap 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. Under Contacts, scroll through the Contacts associated with the account.

Modifying Service Request Information for an Account

Complete the following procedure to modify the service request information for an account.

To modify the service request information for an account

1. Tap 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. 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

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

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

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

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.

The following procedures related to parts and part management are included in this topic:

- *Displaying Part Details*
- *Viewing the Good and Defective Availability Information for a Part*

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

Displaying Part Details

You can display part details by using the Inventory Level list.

To display part details

- 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

Complete the following procedure to view the availability information for a part.

To view the availability information for a part

1. 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.
2. To view the inventory level availability for good parts, select Good from the drop-down menu under Inventory Level.

3. To view the inventory level availability for defective parts, select Defective from the drop-down menu under 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.

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

- *Displaying Order Details (Siebel Field Service)*
- *Modifying Order Information*
- *Modifying Line Item Information for an Order*

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

Displaying Order Details

You can display order details by using the Orders list.

To display order details

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:
    - *Modifying Order Information*
    - *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 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 *Modifying Line Item Information for an Order*.

You cannot create a new order from the Orders view. You can create a new order by navigating to one of the following views:

- Activities, then Recommended Parts and Tools. For more information, see *Verifying and Ordering Parts and Tools for an Activity*.
- Activities, then Part Tracker (and using the RMA link). For more information, see *Removing a Serialized Part*.

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 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.

The following procedures related to invoices and invoice management are included in this topic:

- *Displaying Invoice Details (Siebel Field Service)*
- *Viewing Line Item Information for an Invoice*
- *Printing Invoices*

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

Displaying Invoice Details

You can display invoice details by using the Invoices list.

To display invoice details

1. Tap Side Menu and then tap Invoices to display the following:
    - 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:
    - *Viewing Line Item Information for an Invoice*
    - *Printing Invoices*

Viewing Line Item Information for an Invoice

Complete the following procedure to view the line item information for an invoice.

To view the line item information for an invoice

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

Complete the following procedure to print an invoice.

Note: The print invoice capability in the Siebel Mobile application for Siebel Field Service is built using third-party open source embedded JavaScript (http://embeddedjs.com) and uses MIT licensing. For more information, see *MIT License*.

To print an invoice

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

The following procedures related to assets and asset management are included in this topic:

- *Displaying Asset Details*
- *Viewing Measurement Information for an Asset*
- *Capturing a Reading for an Asset*
- *Viewing Warranty Information for an Asset*
- *Viewing Service Request Information for an Asset*

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

Displaying Asset Details

You can display asset details by using the Assets list.

To display asset details

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

- *Viewing Measurement Information for an Asset*
- *Capturing a Reading for an Asset*
- *Viewing Warranty Information for an Asset*
- *Viewing Service Request Information for an Asset*

Viewing Measurement Information for an Asset

Complete the following procedure to view the measurement information for an asset. You might view measurement information to record readings for utility meters or to measure hydraulic pressure.

To view the measurement information for an asset

1. Tap Side Menu and then tap Assets to display the following:
   - 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. Under 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 such as taking a utility meter reading or measuring hydraulic pressure, you must record an asset reading.

To capture a reading for an asset

1. Tap Side Menu and then tap Assets to display the following:
   - 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. 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, and then save the record.

Viewing Warranty Information for an Asset

Complete the following procedure to view the warranty information for an asset.

To view the warranty information for an asset

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

Complete the following procedure to view the service request information for an asset.

To view the service request information for an asset

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

The following procedures related to shifts and shift management are included in this topic:

- *Displaying Shift Details*
- *Starting and Ending a Shift*
- *Starting and Ending a Break*
- *Starting or Ending a Period of Unavailability*

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

Displaying Shift Details

You can display shift details by using the Shifts list. You can update shift information, including breaks and periods of unavailability (POUs), only if you use Siebel Real-time Scheduler Version 2.1 or later as your scheduling engine and Siebel Field Service Integration to Oracle Real-time Scheduler Version 2.1 or later integration pack for the integration.

To display shift details

1. Tap Side Menu and then tap Shifts to display the following:
    - The Shift list in the main pane from where you can do the following:
        - View and update the shift information, see *Starting and Ending a Shift*.
        - View and update the break information for the shift, see *Starting and Ending a Break*.
        - View and update the period of unavailability (POU) information for the shift, see *Starting or Ending a Period of Unavailability*.
    - The Calendar showing the activity planning information in the side pane.

Starting and Ending a Shift

Complete the following procedure to start and end a shift.

To start and end 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 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

Complete the following procedure to start and end a break.

To start and end a break

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 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

Complete the following procedure to start or end a period of unavailability (POU) for a shift.

To start or end a period of unavailability

1. Tap 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:

- *Starting the Day*.
- *Preparing for Customer Visits*
- *Working on a Job*
- *Finishing a Job*

Starting the Day

Siebel Field Service representatives typically perform the following tasks at the start of each day to plan their daily activities:

- Review the daily activities and schedule. For more information, see *Reviewing Activity Information*.
- View the route for the day (that is, view the locations for the activities on the map). For more information, see *Reviewing Activity Information*.
- View the notifications list. For more information, see *Reviewing Notification Messages in Siebel Mobile* and *Displaying 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 to perform for each activity include the following:

- Review the activity information. For more information, see *Reviewing 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 *Displaying Activity Details (Siebel Field Service)*.
- Review the inventory in the trunk. If parts are not available in the trunk, then order them. For more information, see *Verifying and Ordering Parts and Tools for an Activity*.
- Confirm the availability of substitute parts. For more information, see *Viewing Substitute Information for a Part*.
- If you have the skills to complete an activity, then accept the activity to work on it otherwise decline the activity. For more information, see *Accepting an Activity*.
- Review the tasks needed to complete the activity. For more information, see *Recording 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 to perform include the following:

- Complete each activity task as required and record completion of each task. For more information, see *Recording Task Completion for an Activity*.
- Record and update readings as required. For more information, see *Capturing 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 *Attaching Media to an Activity*.
- Track the movement of parts and nonserialized parts. For more information, see *Modifying Part Tracker Information for an Activity*.
- Remove serialized parts. For more information, see *Removing a Serialized Part*.
- Install replacement serialized parts. For more information, see *Installing a Replacement Serialized Part*.
- Record the time that you spent working to complete the activity. For more information, see *Modifying Time Tracker Information for an Activity*.
- Record any expenses that you incurred while working to complete the activity. For more information, see *Modifying Expense Tracker Information for an Activity*.

Finishing a Job

Siebel Field Service representatives finish work on a job by completing the following tasks:

- Verify that all tasks for the activity are complete. For more information, see *Recording Task Completion for an Activity*.

- Generate a service report for the activity and show it to the customer. For more information, see *Generating Service Reports*.
- Create an invoice for the activity. For more information, see *Creating Invoices from Activities in Siebel Field Service*.
- Capture the (contact) signature for the invoice. For more information, see *Capturing Signatures for Invoices in Siebel Field Service*.
- Record customer feedback to the service provided. For more information, see *Capturing Signatures for Invoices in Siebel Field Service*.
- Record the end time for the activity after you finish work on the job. For more information, see *Modifying Time Tracker Information for an Activity*.

10 Siebel Mobile Application for Siebel Finance

Using the Siebel Mobile Application for Siebel Finance

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

- *Using the Home Page for Siebel Finance*
- *Managing Accounts for Siebel Finance*
- *Managing Contacts for Siebel Finance*
- *Managing Financial Applications for Siebel Finance*
- *Managing Opportunities for Siebel Finance*
- *Managing Households for Siebel Finance*
- *Managing Financial Accounts for Siebel Finance*
- *Managing Activities for Siebel Finance*
- *Managing Leads for Siebel Finance*

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

Using the Home Page for Siebel Finance

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

- *Scheduling and Viewing Activities on the Home Page*
- *Accessing New Records From the Home Page*
- *Reviewing Charts on the Home Page*
- *Reviewing Opportunities From the Home Page*

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

Scheduling and Viewing Activities on the Home Page

On the home page, you can schedule and view activities in the calendar. For more information about using the calendar to schedule and view activities, see *Siebel Fundamentals Guide* .

Accessing New Records From the Home Page

From the home page, you can quickly access the following types of recently created records: applications, leads, items needing approval, and opportunities. After you access the new records for one type, you can navigate back to the home page to access the new records for a different type.

To access new records from the home page

1. Tap 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 *Siebel Applications Administration Guide* .
   - If you tap the New Opportunities link, a list of new opportunities appears.

Reviewing Charts on the Home Page

On the home page, you can review the following charts:

- **Sales Pipeline Phases.** For each sales phase associated with opportunities, this chart shows its percent of the total revenue associated with all opportunities for which the date in the Close Date field is 90 days after the current date.

  The sales phases that appear in this chart are equivalent to the sales stages for opportunities. The sales methods for opportunities determine the sales stages for those opportunities.
- **Number of Opportunities by Product.** For each product, this chart shows the number of opportunities with an Open value in the Sales Stage field.

To review charts on the home page

- Tap 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.

To review opportunities from the home page

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 Finance

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

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

- *Displaying Account Details (Siebel Finance)*
- *Performing Needs Analysis for Accounts*
- *Modifying Account Information*
- *Modifying Contact Information for an Account*
- *Modifying Opportunity Information for an Account*
- *Modifying Address Information for an Account*
- *Modifying Activity Information for an Account*
- *Modifying Account Team Information for an Account*
- *Viewing Financial Account Information for an Account*
- *Viewing Recommendation Information for an Account*
- *Managing Application Information for an Account*

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

Displaying Account Details

You can display account details by using the Accounts list.

To display account details

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 *Modifying Contact Information for an Account*.
- **Opportunities.** Shows the opportunity information for the account. For more information, see *Modifying Opportunity Information for an Account*.
- **Addresses.** Shows the address information for the account. For more information, see *Modifying Address Information for an Account*.
- **Activities.** Shows the activity information for the account. For more information, see *Modifying Activity Information for an Account*.
- **Account Team.** Shows the account team information for the account. For more information, see *Modifying Account Team Information for an Account*.
- **Financial Accounts.** Shows the financial account information for the account. For more information, see *Viewing Financial Account Information for 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:
  - *Performing Needs Analysis for Accounts*
  - *Viewing Recommendation Information for an Account*
- **Applications.** Shows the application information for products for the account. For more information, see *Managing Application Information for an Account*.

4. In the Accounts Lis, tap the name of an account in the Account field.
5. In the Account 360 View that appears, complete the following steps:

   a. In the account form applet, review additional details about the account.

      Some of the information in this form comes from fields in the non-mobile application for Siebel Finance.

   b. In the Timeline applet, review a timeline of the activities that are associated with the account.

      In the timeline, the icons denote the activity types, and the dates and times denote the ending dates and times of the activities.

      You can tap Activities in the 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 *Performing Needs Analysis for Accounts*.
      - Review product recommendations for the account as shown in *Viewing Recommendation Information for an Account*.
      - Start the application capture process for a product and then save or submit the application as shown in *Applying for Products for an Account*.

- Track applications for products, resume existing applications, and sign completed applications as shown in *Managing 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 do not automatically create a financial application when you perform a needs analysis.

To perform a needs analysis 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 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 Finance, see *Intelligent Advisor Workflows for Siebel Finance*. 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 *Viewing Recommendation Information for an Account* and *Applying for Products for an Account*.

Modifying Account Information

Complete the following procedure to modify account information.

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.
   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

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

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.
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 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

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

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.
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

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

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.
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.
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

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

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.
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

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

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.
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. Choose the person on the list that appears, and then tap OK.

Viewing Financial Account Information for an Account

Complete the following procedure to view the financial account information for an account. You cannot modify financial account information for an account.

To view the financial account information for an account

1. Tap 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

Complete the following procedure to view the product recommendation information for an account where a needs analysis has been completed.

Product recommendations are regarded as a suitable fit for an account and an application capture process can be initiated for recommended products as shown in *Applying for Products for an Account*.

To view the recommendation 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.

   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 *Performing Needs Analysis for Accounts*.

Applying for Products for an Account

Applying for a product for an account involves initiating an application capture process for the product and then submitting the completed application for the product from the Recommendations view. Product recommendations are regarded as a suitable fit for an account.

To apply for a product for an account

1. Tap 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 *Performing Needs Analysis for Accounts*.
4. If required, tap Detail to start a Viewer to present additional information about the product and obtain feedback from customers about the presented content.

    The Viewer that you start is similar to the PCD Viewer that is used to deliver personalized content to customers in the Siebel Pharma application. For information about how to use the Viewer, see the following topics:
    - *Using the PCD Viewer in Siebel Mobile*
    - *Showing Presentations in Siebel Mobile*
    - *Recording Responses to Presentations in Siebel Mobile*
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 Finance, see *Intelligent Advisor Workflows for Siebel Finance*. 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 *Managing 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 *Managing 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 have not been submitted, and signing any submitted applications.

To manage the application 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.
   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 Finance

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

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

- *Displaying Contact Details (Siebel Finance)*
- *Performing Needs Analysis for Contacts*
- *Modifying Contact Information*
- *Modifying Opportunity Information for a Contact*
- *Modifying Contact Team Information for a Contact*
- *Modifying Address Information for a Contact*
- *Viewing Financial Account Information for a Contact*
- *Modifying Note Information for a Contact*
- *Modifying Activity Information for a Contact*
- *Viewing Recommendation Information for a Contact*
- *Applying for Products for a Contact*
- *Managing Application Information for a Contact*

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

Displaying Contact Details

You can display contact details by using the Contacts list.

To display contact details

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 *Modifying Opportunity Information for a Contact*.
    - **Contact Team.** Shows the contact team information for the contact. For more information, see *Modifying Contact Team Information for a Contact*.
    - **Addresses.** Shows the address information for the contact. For more information, see *Modifying Address Information for a Contact*.

- **Financial Accounts.** Shows the financial account information for the contact. For more information, see *Viewing Financial Account Information for a Contact*.
- **Notes.** Shows the note information for the contact. For more information, see *Modifying Note Information for a Contact*.
- **Activities.** Shows the activity information for the contact. For more information, see *Modifying Activity Information for a Contact*.
- **Recommendations.** Shows the product recommendations for the contact as recorded by the Intelligent Advisor needs analysis. For more information, see the following:
  - *Performing Needs Analysis for Contacts*
  - *Viewing Recommendation Information for a Contact*
- **Applications.** Shows the application information for products for the contact. For more information, see *Managing 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 Finance.

   b. In the Timeline applet, review a timeline of the activities that are associated with the contact.

      In the timeline, the icons denote the activity types, and the dates and times denote the ending dates and times of the activities.

      You can tap Activities in the 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 *Performing Needs Analysis for Contacts*.
      - Review product recommendations for the account as shown in *Viewing Recommendation Information for a Contact*.
      - Start the application capture process for a product and then save or submit the application as shown in *Applying for Products for a Contact*.
      - Track applications for products, resume existing applications, and sign completed applications as shown in *Managing 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 do not automatically create a financial application when you perform a needs analysis.

To perform a needs analysis 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 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 Finance, see *Intelligent Advisor Workflows for Siebel Finance*. 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 *Viewing Recommendation Information for a Contact* and *Applying for Products for a Contact*.

Modifying Contact Information

Complete the following procedure to modify contact information.

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.
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

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

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.
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

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

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.
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. Choose the person on the list that appears, and then tap OK.

Modifying Address Information for a Contact

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

To modify the address information for a contact

1. Tap 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. Choose the address on the list that appears, then tap OK.
5. Create a new contact address as follows:
   a. Tap Addresses in the list in the 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

Complete the following procedure to view the financial account information for a contact. You cannot modify financial account information for a contact.

To view the financial account information for a contact

1. Tap 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

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

To modify 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

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

To modify 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

Complete the following procedure to view the product recommendation information for a contact where a needs analysis has been completed.

Product recommendations are regarded as a suitable fit for a contact and an application process can be initiated for recommended products as shown *Applying for Products for a Contact*.

To view the recommendation 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.

    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 *Performing Needs Analysis for Contacts*.

Applying for Products for a Contact

Applying for products for a contact involves initiating an application capture process for the product and then submitting the completed application for the product from the Recommendations view. Product recommendations are regarded as a suitable fit for a contact.

To apply for a product for a contact

1. Tap 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. For more information about how to use the Viewer, see the following topics:
   - *Using the PCD Viewer in Siebel Mobile*
   - *Showing Presentations in Siebel Mobile*
   - *Recording Responses to Presentations in Siebel Mobile*
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 Finance, see *Intelligent Advisor Workflows for Siebel Finance*. 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 *Managing 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 *Managing 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 have not been submitted, and signing any submitted applications.

To manage the application 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.

   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 Finance

An *financial application* is a form that an individual or company submits to set up a financial account.

The following procedure related to financial applications and financial application management is included in this topic:

- *Displaying Financial Application Details*

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

Displaying Financial Application Details

You can display financial application details by using the Applications list. You cannot modify financial application information. This information originates in the non-mobile application for Siebel Finance.

To display financial application details

1. Tap 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 Finance

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

The following procedures related to opportunities and opportunity management are included in this topic:

- *Displaying Opportunity Details (Siebel Finance)*
- *Modifying Opportunity Information*
- *Modifying Contact Information for an Opportunity*
- *Modifying Product Information for an Opportunity*
- *Modifying Quote Information for an Opportunity*
- *Modifying Activity Information for an Opportunity*
- *Modifying Opportunity Team Information for an Opportunity*

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

Displaying Opportunity Details

You can display opportunity details by using the Opportunities list.

To display opportunity details

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 *Modifying Contact Information for an Opportunity*.
   - **Products.** Shows the product information for the opportunity. For more information, see *Modifying Product Information for an Opportunity*.
   - **Quotes.** Shows the quote information for the opportunity. For more information, see *Modifying Quote Information for an Opportunity*.
   - **Activities.** Shows the activity information for the opportunity. For more information, see *Modifying Activity Information for an Opportunity*.
   - **Opportunity Team.** Shows the opportunity team information for the opportunity. For more information, see *Modifying Opportunity Team Information for an Opportunity*.

Modifying Opportunity Information

Complete the following procedure to modify opportunity information.

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 on the form that appears, and then save the record.

Modifying Contact Information for an Opportunity

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

To modify the contact information for an opportunity

1. Tap 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

Complete the following procedure to modify the product information for an opportunity.

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 on the form that appears, and then save the record.

Modifying Quote Information for an Opportunity

Complete the following procedure to modify the quote information for an opportunity.

To modify the quote information for an opportunity

1. Tap 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

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

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 on the form that appears, and then save the record.

Modifying Opportunity Team Information for an Opportunity

Complete the following procedure to modify the opportunity team information for an opportunity.

To modify the opportunity team information for an opportunity

1. Tap 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 Finance

A *household* is a group of people who live together in the same dwelling.

The following procedures related to households and household management are included in this topic:

- *Displaying Household Details*
- *Modifying Household Information*
- *Modifying Contact Information for a Household*
- *Viewing Note Information for a Household*
- *Viewing Activity Information for a Household*

- *Viewing Opportunity Information for a Household*
- *Viewing Financial Account Information for a Household*
- *Modifying Address Information for a Household*

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

Displaying Household Details

You can display household details by using the Households list.

To display household details

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 *Modifying Contact Information for a Household*.
   - **Notes.** Shows the note information for the household. For more information, see *Viewing Note Information for a Household*.
   - **Activities.** Shows the activity information for the household. For more information, see *Viewing Activity Information for a Household*.
   - **Opportunities.** Shows the opportunity information for the household. For more information, see *Viewing 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 *Modifying Address Information for a Household*.

Modifying Household Information

Complete the following procedure to modify household information.

To modify 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

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

If you associate multiple contacts with a household, you can designate one of the contacts as the primary contact. The name of this primary contact appears in the Head of Household field for the household record.

To modify the contact information for a household

1. Tap 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

Complete the following procedure to view the note information for a household.

You can view the note information that is associated with all contacts of the household. For information about modifying the note information for each contact of the household, *Modifying Note Information for a Contact*.

To view the note 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. 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

Complete the following procedure to view the activity information for a household.

You can view the activity information that is associated with all contacts of the household. For information about modifying the activity information for each contact of the household, *Modifying Activity Information for a Contact*.

To view the activity 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. 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

Complete the following procedure to view the opportunity information for a household.

You can view the opportunity information that is associated with all contacts of the household. For information about modifying the opportunity information for each contact of the household, *Modifying Opportunity Information for a Contact*.

To view the opportunity 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. 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

Complete the following procedure to view the financial account information for a household. You cannot modify financial account information for a household.

You can view the financial account information that is associated with all contacts of the household. For information about viewing the financial account information for each contact of the household, *Viewing Financial Account Information for a Contact*.

To view the financial account 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. 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

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

To modify 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 Finance

A *financial account* is a record of the monetary transactions for an individual or company.

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

- *Displaying Financial Account Details*
- *Modifying Service Request Information for a Financial Account*
- *Viewing Balance History Information for a Financial Account*
- *Viewing Transaction Detail Information for a Financial Account*

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

Displaying Financial Account Details

You can display financial account details by using the Financial Accounts list. You cannot modify financial account information. This information originates in the non-mobile application for Siebel Finance.

To display financial account details

1. Tap 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 *Modifying Service Request Information for a Financial Account*.
    - **Balance History.** Shows the balance history information for the financial account. For more information, see *Viewing Balance History Information for a Financial Account*.
    - **Transaction Detail.** Shows the transaction detail information for the financial account. For more information, see *Viewing Transaction Detail Information for a Financial Account*.

Modifying Service Request Information for a Financial Account

Complete the following procedure to modify the service request information for a financial account.

To modify the service request information for a financial account

1. Tap 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

Complete the following procedure to view the balance history information for a financial account.

To view the balance history information for a financial account

1. Tap 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

Complete the following procedure to view the transaction detail information for a financial account.

To view the transaction detail information for a financial account

1. Tap 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 Finance

An *activity* is a task that you perform for a contact, account, or opportunity.

The following procedures related to activities and activity management are included in this topic:

- *Displaying Activity Details (Siebel Finance)*
- *Modifying Activity Information*
- *Modifying Contact Information for an Activity*
- *Modifying Employee Information for an Activity*

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

Displaying Activity Details

You can display activity details by using the Activities list.

To display activity details

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 *Modifying Contact Information for an Activity*.
    - **Employees.** Shows the employee information for the activity. For more information, see *Modifying Employee Information for an Activity*.

Modifying Activity Information

Complete the following procedure to modify activity information.

To modify 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

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

To modify 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

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

To modify 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 Finance

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

The following procedures related to leads and lead management are included in this topic:

- *Displaying Lead Details (Siebel Finance)*
- *Modifying Lead Information*
- *Modifying Opportunity Information for a Lead*
- *Converting a Lead to an Opportunity*

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

Displaying Lead Details

You can display lead details by using the Leads list.

To display lead details

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:
     - *Modifying Opportunity Information for a Lead*
     - *Converting a Lead to an Opportunity*

Modifying Lead Information

Complete the following procedure to modify lead information.

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 on the form that appears, and then save the record.

Modifying Opportunity Information for a Lead

Complete the following procedure to modify the opportunity information for a lead.

To modify the opportunity information for a lead

1. Tap 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* .

To convert a lead to an opportunity

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.

11 Intelligent Advisor Workflows

Intelligent Advisor Workflows for Siebel Finance

This chapter includes information about the Intelligent Advisor workflows for Siebel Finance.

- *Intelligent Advisor Integration Workflows for Interview Sessions*
- *Intelligent Advisor Integration Workflows for Siebel Finance*

Note: If you cannot see all of the detail in some of the larger workflow diagrams in this appendix, then you can view these workflows in Siebel Tools to see a clearer image.

Intelligent Advisor Integration Workflows for Interview Sessions

The following Intelligent Advisor workflows control processing for interview sessions on a Web site:

- **OPA Interview Service Main Workflow.** This workflow manages an interview session when customers apply for benefits and screen for services. It drives an interview session by calling other workflows.
- **OPA Get PreSeed Data Workflow.** This workflow gets the pre-seed data for an interview session.
- **OPA Interview Service Sub Workflow.** This workflow manages the communication between an interview session for a customer and Intelligent Advisor by sending requests to and receiving and processing responses from Intelligent Advisor. Intelligent Advisor responses are converted to the Siebel data structure and appear in the user interface for the interface session. The OPA Interview Service Main Workflow calls this workflow as a subprocess.
- **OPA Process Submit Data Workflow.** This workflow converts the integration object for submitting data in Intelligent Advisor format to an integration object in Siebel format. The OPA Interview Service Main Workflow calls this workflow as a subprocess.
- **OPA End Interview Workflow.** This workflow ends an interview session. The OPA Interview Service Main Workflow calls this workflow as a subprocess when the user closes an interview session.
- **OPA Get Meta Data Service for PUB Sample Intake Contact Workflow.** This workfow prepares a response to a Simple Object Access Protocol (SOAP) GetMetadata request from the Intelligent Advisor Hub, and sends the PUB Sample Intake Contact integration object to Intelligent Advisor.
- **OPA Metadata Service - CheckAlive Workflow.** This workflow sends a response to SOAP CheckAlive request from the Intelligent Advisor Hub to Intelligent Advisor.

For more information about each of these workflows and about integrating Intelligent Advisor for Siebel Business applications, see *Siebel Self Service Administration Guide* .

Intelligent Advisor Integration Workflows for Siebel Finance

The following group of Intelligent Advisor workflows control processing for Siebel Finance-related interview sessions, which can be conducted from your Siebel Mobile or Siebel desktop application. It includes the following workflows:

- *FINS Needs Analysis Account Main Workflow*
- *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 following business component: FINS Needs Analysis Account.
- Contains the following business component user properties:
    - Name: BCPreseedField1

      Value: Rulebase:FINS Needs Analysis.Rule Base
    - Name: BCPreseedField2

      Value: SeedAccountId:FINS Account - Mobile.Id
    - Name: WFInputArgs1

      Value: Business Service:OPA Interview Framework Service
    - Name: WFInputArgs2

      Value: Method:InvokeWorkflow
    - Name: WFInputArgs3

      Value: GotoViewName:FINS Account Recommendation View - Mobile
    - Name: WFInputArgs4

      Value: WorkflowName:FINS Needs Analysis Account Main Workflow
    - Name: WFInputArgs5

      Value:MappingName:FINSCheckingAccountMappings
- Uses the following business component class: CSSBCFINSIntw.

  Note that this is a specialized class for business components, which supports the following business component user properties:

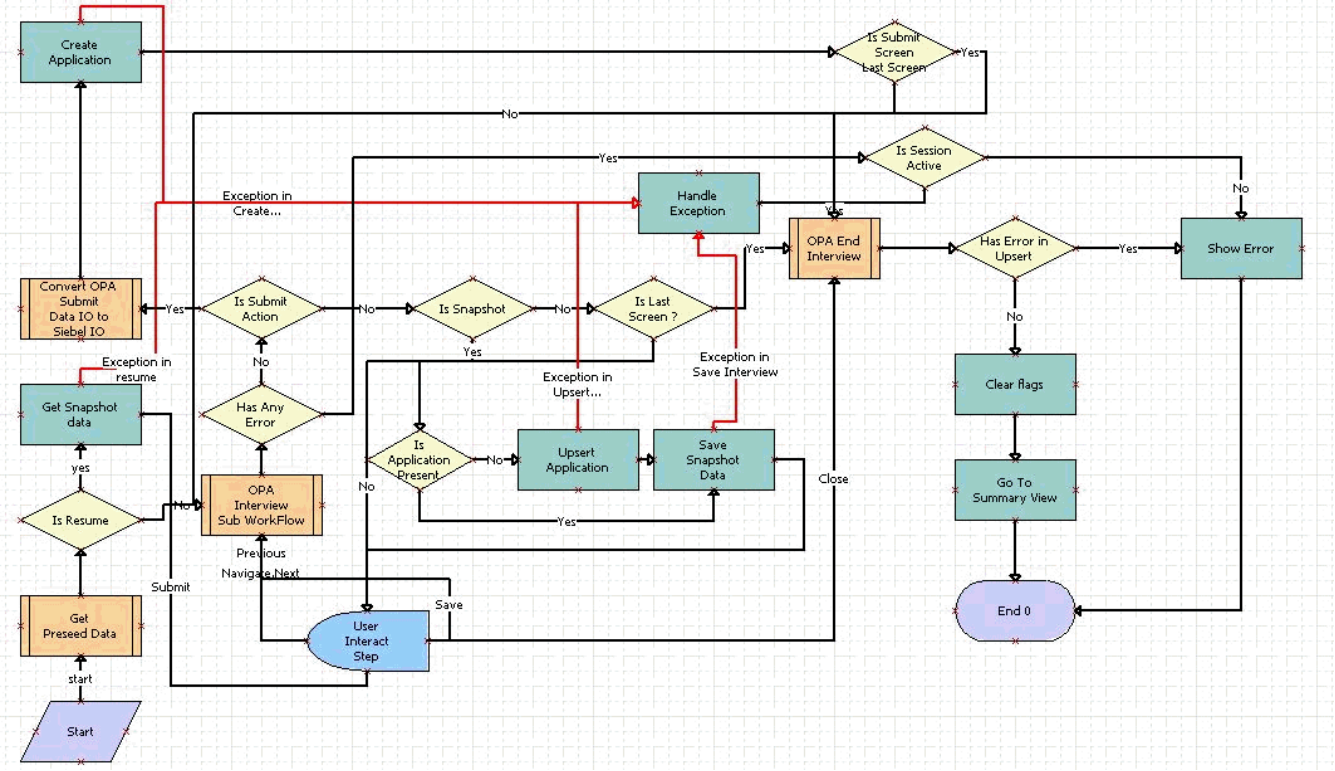
    - **`BCPreseedField<x>`** where x is any positive number, and prepares the property set in format **`[Rulebase]=<Value of BC field FINS Needs Analysis.Rule Base>`**.

- **`WFInputArgs<x>`** where x is any positive number, and prepares the property set in format **`[Business Service] = "OPA Interview Framework Service".`**

- Uses the following Apply Button method: StartFINSInterview.

The FINS Needs Analysis Account Main Workflow is the driver workflow to start a needs analysis for an account. 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 Finance.



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 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 following business component: FINS Needs Analysis Contact.
- Contains the following business component user properties:
  - Name: BCPreseedField1

    Value: Rulebase:FINS Needs Analysis.Rule Base
  - Name: BCPreseedField2

    Value: SeedContactId:FINS Contact - Mobile.Id
  - Name: WFInputArgs1

Value: Business Service:OPA Interview Framework Service

- Name: WFInputArgs2

  Value: Method:InvokeWorkflow

- Name: WFInputArgs3

  Value: GotoViewName:FINS Contact Recommendation View - Mobile

- Name: WFInputArgs4

  Value: WorkflowName:FINS Needs Analysis Contact Main Workflow

- Name: WFInputArgs5

  Value:MappingName:FINSCheckingContactMappings

- Uses the following business component class: CSSBCFINSIntw.

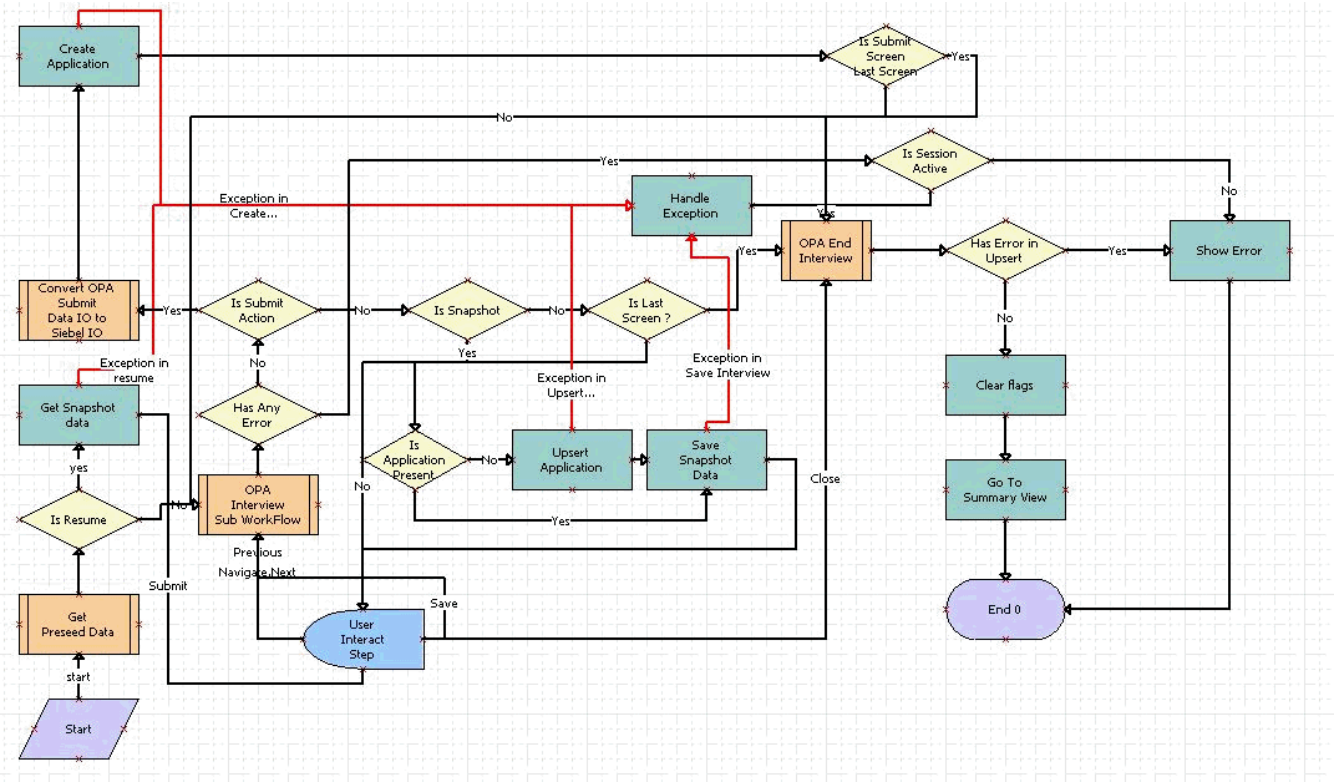
  This is a specialized class for business components, which supports the following business component user properties:

  - **`BCPreseedField<x>`** where x is any positive number, and prepares the property set in format **`[Rulebase]=<Value of BC field FINS Needs Analysis.Rule Base>.`**
  - **`WFInputArgs<x>`** where x is any positive number, and prepares the property set in format **`[Business Service] = "OPA Interview Framework Service".`**

- Uses the following Apply Button method: StartFINSInterview.

The FINS Needs Analysis Contact Main Workflow is the driver workflow to start a needs analysis for a contact. 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 Finance.



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:

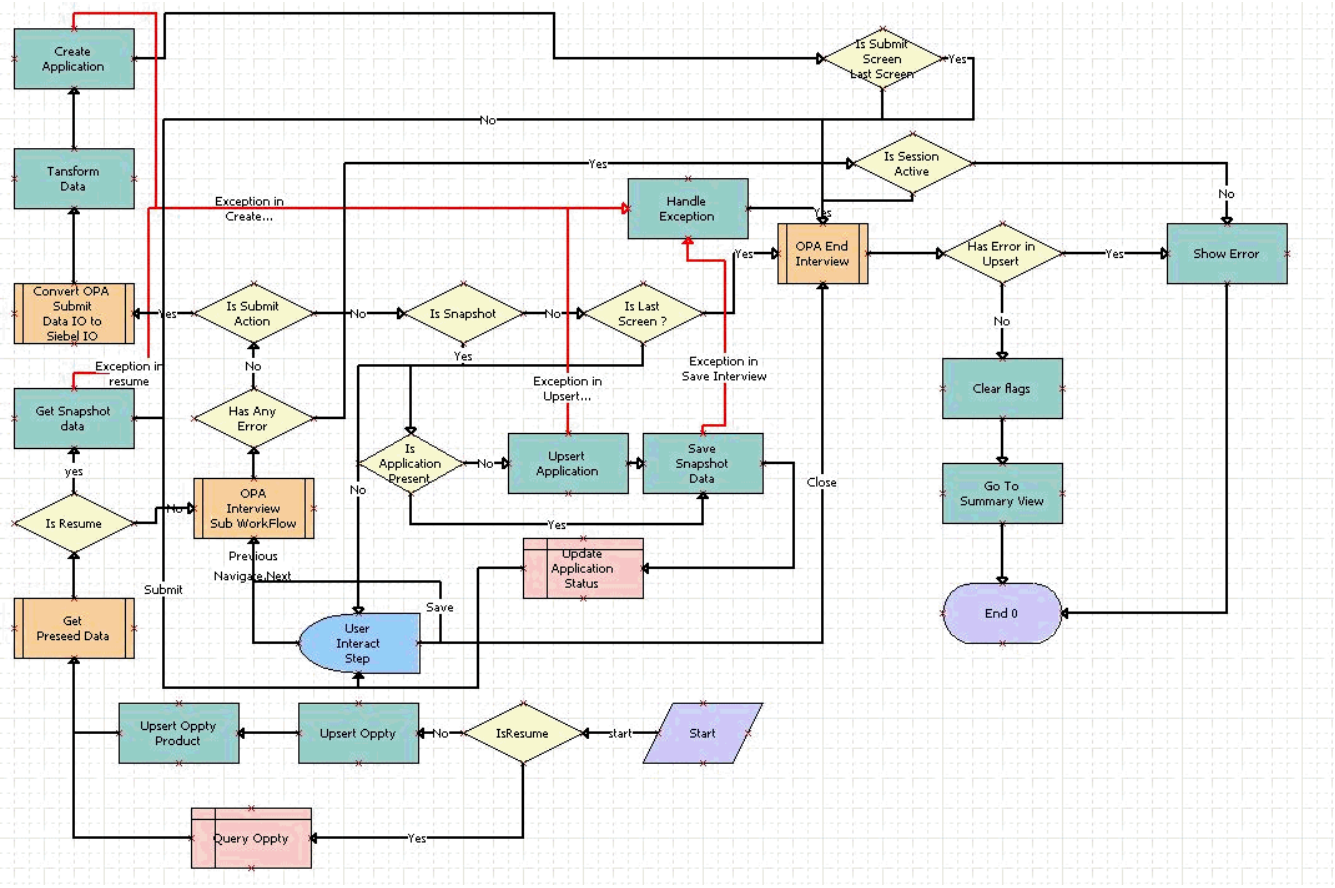
- Is called from the following business component: FINS Product.
- Contains the following business component user property:

  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.



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.

12 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*
- *Setting Up CardDAV Dynamic Mapping for Siebel CRM*
- *Enabling 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 designed to allow users to access and share address book or 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 are able to view and update Siebel Business Application contact/address book 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 book 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 *Setting Up CalDAV and CardDAV Publishing* and *Siebel Applications Administration Guide* .
- Users of mobile devices must set up CardDAV and CalDAV publishing on their devices in order to be able to access contact or calendar data. For more information, see *Setting Up CalDAV and CardDAV Publishing*.
- Enable CardDAV dynamic mapping between Siebel objects and CardDAV properties. For more information, see *Enabling 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.