Oracle Sales For Handhelds

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E-BUSINESS SUITE

Oracle® Sales for Handhelds is the application that keeps sales reps easily informed and effective on the road. The application is a key component of the Oracle Customer Relationship Management solution, the integrated suite that drives profitable customer interactions.

KEY FEATURES

- Native PIM Tool integration
- Real-time access to sales and customer information
- Real-time data access from calendar and contacts
- SMS/Email alerts
- Synchronization preferences
- Email interaction
- Built on industry standard open architecture
- Multiple device support

Overview

Salespeople on the road need the latest information about customers and deals, even when they are away from laptops and WiFi connections. Oracle Sales for Handhelds turns any supported handheld device into a powerful access point for enterprise information. Sales reps can quickly view and update contacts, appointments and tasks through the familiar interface of their handheld's Personal Information Manager, or use the application in real-time through the handheld's Web browser. On the way to a customer meeting, sales reps can check the latest information about the customer and opportunity. On site, the rep can check the status of a customer order, take meeting notes, and set follow-up items—all right in the meeting. After the rep updates deal status, changes flow into the related sales forecast, ensuring that the sales team and sales management have a unified view of customers, pipeline and orders. With Oracle Sales for Handhelds, your mobile sales force is always informed and in touch.

Figure 1: Wireless handheld access to enterprise information makes mobile users more effective

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With Oracle Sales for Handhelds you can:

- Update customer and deal information anywhere

- Improve sales call preparation and follow-up

- Manage deals consistently

Update Customer and Deal Information Anywhere

Oracle Sales for Handhelds keep customer information up to date on the road and in your enterprise system. Vital customer information never falls through the cracks, because salespeople can access and update enterprise data wirelessly. Sales for Handhelds uniquely let users access enterprise Sales Force Automation (SFA) information from either a handheld Web browser or a handheld's Personal Information Manager (PIM), such as Microsoft® Outlook.
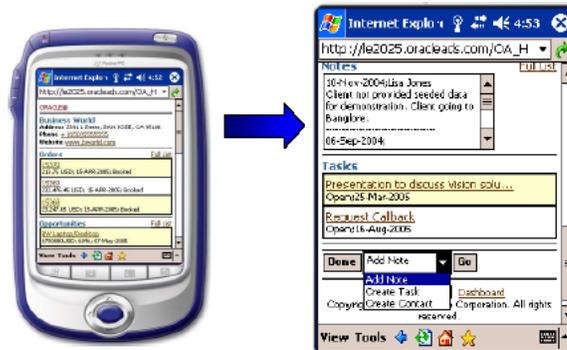

Figure 2: Sales for Handhelds accesses and updates enterprise SFA data via PIM or Web browser

Many mobile salespeople use a handheld device's PIM as their home base. That's why Oracle Sales for Handhelds lets users access and update enterprise contacts, calendar and tasks right within Microsoft® Outlook. Oracle's bi-directional synchronization refreshes the data to and from the enterprise SFA application to maintain a single source of truth for all users. Synchronized appointments, contacts and tasks are categorized within Outlook, allowing users to keep personal information separate. Personal appointments are marked in the enterprise calendar as time bookings to reflect true availability. Users can also add notes or create appointment for a contact, which update to the enterprise sales application.

But Oracle Sales for Handheld's goes beyond simple synchronization. While Sales for Handhelds users can always access real time data through a Web browser, the software also provides a unique wireless launch pad within Outlook to make it even easier to drill-down to information specific to a particular appointment. Sales for Handhelds do this by placing hyperlinks to relevant information in the PIM in an appointment's notes section. Users click on these links to drill to real-time enterprise data, including meeting attendees and opportunity details.

Improve Sales Call Preparation and Follow-up

It seems there is never enough time to prepare for an important sales meeting, or to deal with the inevitable follow-up tasks. Oracle Sales for Handhelds makes it easy for mobile sales reps to prepare for their sales call, answer questions during the meeting, and capture and track follow-up items.

Figure 3: Real-time opportunity information help reps prepare, conduct, and follow up on sales calls

With Sales for Handhelds, reps can prepare anywhere anytime—right up to the moment the meeting begins. Using a handheld Web browser, salespeople can quickly view real-time updates to the opportunity. When the meeting begins, online information even lets reps answer customer – such as whether an outstanding order has been shipped – right in the meeting.

Most sales meetings generate follow-up items. Oracle Sales for Handhelds allows reps to create follow-up items such as tasks, appointments or notes. Reps can easily associate each follow-up item with an opportunity, customer or contact. Unlike disconnected PIMs, Sales for Handhelds provides complete visibility of follow up items to other participants in the sales process. So reps can be sure the ball isn't dropped.

In addition, Sales representatives working in a collaborative environment need to be aware of various activities that occur with leads, opportunities, quotes, etc. A large amount of these interactions with contacts happens over email. Oracle Sales for Handhelds provides an automated system for tracking email interactions with contacts. Keeping the sales force informed increases the effectiveness of sales collaboration and leads to efficient handling and closure of sales opportunities.

Since sales reps and managers are often on the road to visit customers, it is very difficult to keep track of activities. In a collaborative selling environment, it becomes even more difficult to keep them updated on customer and deal activities. With alerts, sales reps can receive automatic information of any type of business events (e.g. service request escalations, delinquent invoices, service contract termination, sales agreement termination, etc) anytime, anywhere via SMS or email on any mobile device.

Establishing alerts provides the following advantages to the sales force:

• Proactively informs users on the progress of their sales deals

• Increases the responsiveness to customer needs

- Ensures critical issue is noticed

- Eliminates information lag
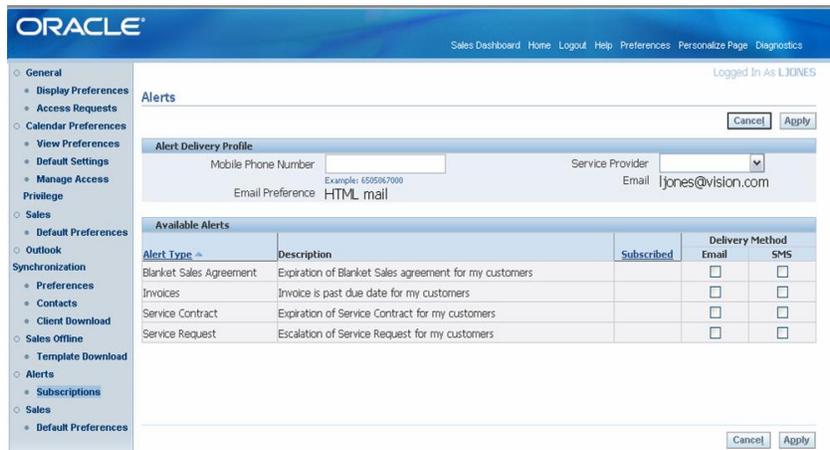
Figure 4: Subscribing to mobile alerts allow sales users to be notified when critical events occur

Manage Deals Effectively

Sharing information across the enterprise is a key benefit of sales force automation. Oracle Sales for Handhelds extends that sharing to handheld users. Oracle Sales for Handhelds ensures coordination between all participants, making mobile reps full participants in your collaborative, multi-channel sales process.
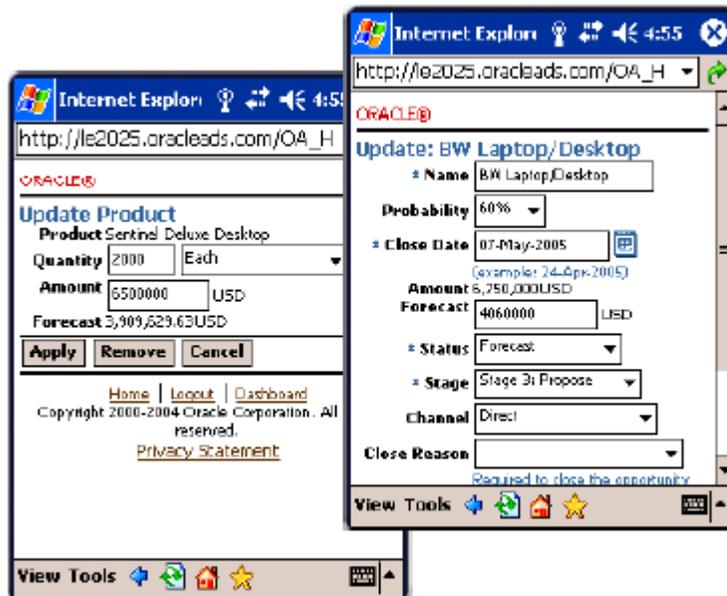
Figure 5: Real-time updates to enterprise information improve collaboration and forecast accuracy

- Oracle Telesales
- Oracle Proposals
- Oracle Sales Offline
- Oracle Marketing
- Oracle Incentive Management

Manage Mobile Data Consistently

In a collaborative sales environment, out-of-date information causes wasted effort or even channel conflict. Reps can easily waste time on futile or duplicate efforts—perhaps even attempting to sell customers products they have recently ordered through another channel. Oracle Sales for Handhelds cuts duplication by making sure that all participants have a single, up to date view of deal progress.

Old information from the field also handicaps management by making forecasts obsolete before sales managers even see them. With Oracle Sales for Handhelds, the latest updates from the road immediately flow to the SFA system's forecast. Salespeople can update opportunity details such as forecast amount and win probability immediately after sales meetings. Oracle Sales for Handhelds keeps both detailed opportunity information and summary data such as forecasts up to date.

Robust Synchronization

Oracle Sales for Handhelds lets users access and update enterprise contacts, calendar and tasks right within Microsoft® Outlook. Oracle's bi-directional synchronization refreshes the data to and from the enterprise SFA application to maintain a single source of truth for all users. Synchronized appointments, contacts and tasks are categorized within Outlook, allowing users to keep personal information separate. Personal appointments are marked in the enterprise calendar as time bookings to reflect true availability. Users can also add notes or create appointment for a contact, which update to the enterprise sales application. Users have the ability to configure options pertaining to the synchronization of contacts, appointments, and tasks for Oracle Sales Synchronization. Contact, appointment, and task synchronization can be enabled or disabled individually per synchronizing device.

Conflict Resolution During Synchronization

Users have the ability to handle conflicts from every device that allows synchronization. Conflict resolution for contacts, appointments, and tasks can configured as server always wins and replace client data, server always wins and duplicate client data, or client always wins for appointments, tasks, and contacts individually. Conflict resolution allows the user to choose to merge data as well.
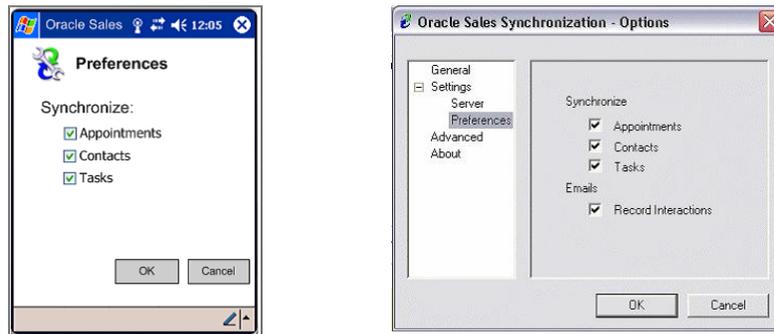

Figure 6: Users have the ability to handle conflicts from every device that allows synchronization

Oracle E-Business Suite -- The Complete Solution

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees, products—all aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

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