

*Siebel 8.0 Essentials*

# Module 1: Introducing Siebel Applications

# 1

# Module Objectives

- After completing this module you should be able to:
  - Describe Siebel Customer Relationship Management (CRM) applications and how they are classified
  - Identify the common business entities found in Siebel CRM applications
  
- Why you need to know:
  - You need to be familiar with Siebel applications to understand the context of this course

# Siebel Customer Relationship Management (CRM)

- Enables you to manage interactions with customers, partners, and employees
  - Typically deployed as a single application with broad functionality
  - Supports multiple communication channels
    - Web and email
    - Call center
    - Field service
- Uses a single database to:
  - Allow all users access to the same set of data
    - Example: The correct customer order status is seen by all relevant users
  - Ensure changes to data are made once and only once
    - Example: An address needs to be updated in only one place
- Is a packaged application with built-in best practices

# Siebel CRM Applications

- Are available tailored for:
  - Different types of customer, partner, or employee interactions and channels (horizontal applications)
  - Different industries (industry applications)
- Examples:
  - Horizontal applications
    - Siebel Sales
    - Siebel Call Center
    - Siebel Partner Portal
    - Siebel Remote
  - Industry applications
    - Siebel Finance
    - Siebel Consumer Goods

# Types of Siebel Enterprise Applications

- Employee applications
  - Are used by internal employees
  - Examples include:
    - Siebel Call Center
    - Siebel Sales
- Customer and partner applications
  - Are used by customers and partners
  - Examples include:
    - Siebel eSales
    - Siebel Partner Portal

# Employee Application: Siebel Sales

- Siebel Sales may be used by a company's sales representatives and managers to manage accounts, sales opportunities, and contacts

**Siebel Sales Opportunities screen**

File Edit View Navigate Query Tools Help

ORACLE

Saved Queries:

Opportunity:

Home Opportunities Accounts Contacts Calendar Forecasts Revenues Quotes

Opportunities Home | Opportunities List | Charts | Opportunity Explorer | Manager's Explorer | Opportunities Administration | Lead Sources Administration

PCS Puma Laptop PS Deployment - Erickson Retirement

69 of 72+

Menu New Delete Query

Opportunity Name: PCS Puma Laptop PS Revenue: \$220,000.00 Currency: USD Sales Objective: PCS Puma Laptop PS Deployment - Erickson Retirement

Account: Erickson Retirement Close Date: 4/1/2002 Committed:

Sales Team: TSMYTHE Sales Stage: 09 - Closed/Lost Lead Quality: 3-High

Territories: Probability %: 0% Organization: PCS Americas

More Info Activities Assessments Attachments Contacts Quotes Revenues Target Account Selling Products Proposals Transfer Notes Tasks

Menu Add New Delete Query 1 - 4 of 4

Last Name	First Name	Mr/Ms	Work Phone #	Job Title	Email	Account	Site	Role
Agostini	Rakesh	Mr.	(847) 555-4628	Sr. Business Consult	Rakesh_Agostini@m	Erickson Retirement	Atlanta, GA	Approver
Conway	Brad	Mr.	(707) 678-9023	Practice Manager	bconway@deloitte.c	Erickson Retirement	Atlanta, GA	
Dannemann	Atul		(312) 555-7894	Database Analyst	Atul_Dannemann@c	Erickson Retirement	Atlanta, GA	Evaluator
Doeden	Mike		(408) 555-7829	Manager Sales Admi	Mike_Doeden@sil.c	Erickson Retirement	Atlanta, GA	Evaluator

# Employee Application: Siebel Call Center

- Siebel Call Center may be used by a company's telesales and service representatives

Siebel Call Center  
service screen

The screenshot displays the Siebel Call Center interface. At the top, there is a menu bar with options like File, Edit, View, Navigate, Query, Tools, and Help. Below the menu bar is a toolbar with various icons. The main navigation area includes tabs for Home, Accounts, Contacts, Households, Sales Orders, Service (highlighted with a red box), Assets, Service Orders, Opportunities, and Quotes. The Service Requests List is visible, showing a table of requests. Below the table, the details for a specific request (SR # 1-1826242) are shown, including fields for SR #, Last Name, Account, Work Phone #, First Name, Site, Summary, and Description.

New	SR #	Status	Substatus	Summary	Account	Last Name	Owner	Priority
>	1-1826242	Open	Resolved	How do I setup a networked printer on m	Marriott Internatio	Manning	CCHENG	2-High
	1-1856014	Open	Unassigned	Problem with resolution after self-installin	Marriott Internatio	Carlson	CCHENG	3-Medium
*	1-1862924	Open	Resolved	Anti-virus software failing to update .DA	Marriott Internatio	Carlson	CCHENG	3-Medium
	1-2170401	Open	Unassigned	Problem with upgrade of CPU	AEP Communication		CCHENG	3-Medium
	1-2222321	Open	Unassigned	How do I install graphics card?	Marriott Internatio	Manning	CCHENG	3-Medium
*	1-3598124	Open	Unassigned	Problem with my hard drive	Cymer Inc.	Ellis	CCHENG	2-High
	1-5071509	Open	Unassigned	Question on disk problem	Marriott Internatio	Manning	CCHENG	3-Medium
	1-5071517	Open	Unassigned	Server Failure: PCS 5005 needs replacem	Marriott Internatio	Carlson	CCHENG	3-Medium
	1-5411401	Open	Unassigned	I need help.	3Com	Pennington	CCHENG	3-Medium
	1-692304	Open	In Process	Customer has a problem with the HP Prin	Marriott Internatio	Manning	CCHENG	2-High

1-1826242

Menu | New | Delete | Query | Smart Answer | Verify | Verify Best Time

SR #: 1-1826242 | Work Phone #: (408) 477-2006 | Summary: How do I setup a networked printer on my PCS series computer?

Last Name: Manning | First Name: James | Description: Please provide documentation for this process. Thanks.

Account: Marriott Internation | Site: HQ

# Customer Application: Siebel eSales

- May be used by customers to purchase products over the Web
- Includes an interactive product catalog, search and product comparison mechanisms, and online ordering capabilities

**ORACLE** Siebel Customer Relationship Management

Home **Catalog** Product catalog Shopping cart

Search:  Go Advanced Search

Siebel eSales Home:

**Welcome Guest Customer** Tuesday, January 09, 2007

PCS provides the industry's most comprehensive family of computers and computer related accessories. We are committed to doing whatever it takes to ensure our customers are 100 percent satisfied.

**Browse**

**Links**

- Search With Characteristics
- Browse Literature

**Recommended Items** 1 - 5 of 5+

**11 Mbps Wireless LAN PC Card with XJACK® Antenna**  
Tricot - 11 Mbps Wireless LAN PC Card with XJACK® Antenna

**24x/10x/24x CD-RW w/8x DVD Combo Drive**  
CompMaster - 24x/10x/24x CD-RW w/8x DVD Combo Drive

**7200RPM 80GB Retail Kit**  
Primex - 7200RPM 80GB Retail Kit

**Last Item Added:**

**Line Items:** **Total Price:**

[View Details](#)

**Need Advice?**  
eAdvisor can make recommendations that best fit your needs

**Quick Add**

Complete one of the two fields below and click Add Item

**Item Name:**

**Item Code:**

[Add Item](#)



# Partner Application: Siebel Partner Portal

- May be used by a company's partners to communicate, collaborate, and conduct business with a Web-based interface

The screenshot displays the Oracle Siebel Customer Relationship Management Partner Portal. The top navigation bar includes 'Opportunities' (highlighted in red), 'Analytics', and other menu items. Below the navigation bar, there is a table of opportunities. The table has columns for Name, Account, Revenue, Sales Stage, Close Date, Lead Quality, and Probability %. The first row is highlighted in yellow and shows '1000 x TPS Reports' with a revenue of \$0.00 and a close date of 1/8/2007.

Name	Account	Revenue	Sales Stage	Close Date	Lead Quality	Probability %
1000 x TPS Reports		\$0.00		1/8/2007		0%

Below the table, the detailed view for '1000 x TPS Reports' is shown. It includes a form with the following fields:

- Name: 1000 x TPS Reports
- Account: [Dropdown]
- Site: [Dropdown]
- Description: [Text Area]
- Probability %: 0%
- Close Date: 1/8/2007
- Sales Stage: [Dropdown]
- Organization: Default Organization
- Revenue: \$0.00
- Expected Value: \$0.00
- Committed:
- Sales Team: ADMIN

A yellow callout box on the right side of the screen contains the text: "Partner Portal opportunities screen".

# Comparison of Siebel CRM Applications

- Siebel functionality is delivered as separate horizontal or vertical applications that:
  - Have the same user interface and navigation
  - Are based on the same underlying application architecture
  - Use the same underlying technologies for automation, integration, and so on
  - Share many of the same application screens
- Applications use the same executable, but use different configuration and input files
  - Configuration files are used to specify application parameters
  - Use Siebel Tools to generate input files that control behavior
- This course will teach you how to modify these files to meet the specific requirements of your business

# Siebel User Interface (UI) Modes

- The Siebel UI is rendered in one of two modes:

High Interactivity Mode

Standard Interactivity Mode

## High Interactivity Mode

- Is available for employee applications, supporting highly interactive users
- Uses additional code, such as Active X controls, to provide extra functionality
  - Drag-and-drop for setting column widths
  - Explorer-like hierarchy views
  - Menu bar and tool bars
  - Saving records by moving off the current line
- Requires Internet Explorer (check documentation for versions)

## Standard Interactivity Mode

- Is available for customer and employee applications
- Designed to be less browser-dependent
  - Behaves like a typical HTML-based Web application
- Available on a wide variety of browsers (check documentation for supported browsers)

# Common Siebel Application Business Entities

- Siebel applications use common business entities
  - A business entity is something of business interest in the real world
- Siebel applications refer to these entities as business components
- Examples:
  - Accounts
  - Contacts
  - Opportunities
  - Service requests
  - Assets

# Common Siebel Business Components

Accounts

Contacts

Opportunities

Service Requests

Assets

# Accounts

- Are businesses external to your company
- Represent a current or potential client, a business partner, or a competitor
- Are associated with a team

Account:

Home Accounts Contacts Households Sales Orders Service Assets

Accounts Home | Accounts List

My Accounts Menu New Delete Query Collaborate Create Team Space

Account Name	Site	Main Phone #	Status	URL
> Akamai Technologies, Inc.	Cambridge, MA	(508) 460-8900	Gold	www.akamai.com
British American Tobacco	Hamburg, Germany	+490242117465	Silver	www.bat.com/
Cap Gemini Ernst & Young	Atlanta, GA	(404) 249-2000	Gold	www.bellsouth.com
Chase Manhattan Bank	Manhattan, Ny	(212) 622-0726	Platinum	www.chase.com
Country Companies Services Inc.	Bloomington, IL	(309) 821-3000	Platinum	www.countrylife.com
Danney K. Foundation	Pittsburgh, PA	(800) 578-9515	Gold	www.dkf.com
FleetBoston Financial	Framingham, MA	(617) 883-9300	Active	www.fleet.com
Harris Corporation	Florida (HQ)	(414) 239-5000	Active	www.harris.com
Holiday Inn	HQ-Corporate	(707) 234-5506	Active	www.holidayinn.com
IBM Corporation	Poughkeepsie, NY	(914) 433-9187	Platinum	www.ibm.com



# Contacts

- Are people with whom you do business
- Can be public or marked as personal
- Are associated with a team (public contacts) or a user (personal contacts)

Contact:

Home Accounts **Contacts** Households Sales Orders Service Assets Service Orders 0

Contacts Home | **Contacts List**

My Contacts ▾ Menu ▾ New Delete Query

Last Name ▾	First Name	Mr/Ms	Work Phone #	Job Title	Email
> Allen	Ross	Ms.	(312) 555-7448	Training Specialist	Ross_Allen@kemper.com
Allen	Ross	Mr.	(312) 555-7448		
Allen	Ross	Mr.	(312) 555-7448		
Brown	Joshua	Mr.	(818) 731-1237 x18	Student	josh@comappeal.com
Carlson	Mike	Mr.	(301) 380-5001	Director, IT Procurement	mcarlson@demohost.siebel.com
Carlson	Troy	Mr.	(301) 380-4532	Customer Service Administrator	tcarlson@marriott.com
Cutting	JoAnn	Ms.	(467) 995-6990	Lawyer	joann876@aol.com
Damone	Victor	Mr.	(408) 373-4332	IT Director	vic.damone@princesscruises.com
Fosters	Julie	Ms.	(415) 345-8832	Senior Director, Communications	jfosters@akamai.com
Gaddam	Mike	Ms.	(416) 555-2703	Associate Director, eBusiness Application	Mike_Gaddam@bell.ca

# Opportunities

- Are potential revenue-generating events
- Have the following characteristics:
  - A possible association with an account
  - A probability of completion
  - A close date
- Are associated with a team

Opportunity:

Home Opportunities Accounts Contacts Calendar Quotes

Opportunities Home | Opportunities List | Charts | Opportunity Explorer

My Opportunities Menu New Delete Query

Opportunity Name	Account	Revenue	Committed	Team Space	Sales Stage
> Laptops for Kaboom		\$25,000.00			
350 V16 Monitor Units	Genesys Communica	\$340,000.00			02 - Qualification
Performance Servers	State of Florida	\$250,000.00			02 - Qualification
150 PCS Puma Laptop EB units	3Com	\$250,000.00			03 - Closing
Fast Ethernet NIC PCI 10/100 - 2500 unil	Marriott Internation	\$687,500.00	✓		04 - Opportunity
75x PCS Torro Server Pro FL, all options	PlusOne Financial	\$300,000.00	✓		03 - Qualification
500x PCS Chev Desktop Q Options	Altera	\$275,000.00	✓		03 - Qualification
40x ePharma Open	Assurances General	\$200,000.00	✓		04 - Opportunity
505x PCS Puma Laptop CC	CJ Tenney	\$1,500,000.00	✓		06 - Short List
PCS Puma Laptop P5 Deployment - Ericks	Erickson Retirement	\$220,000.00	✓		09 - Closed/Lost

# Service Requests

- Are requests from customers or prospects for information or assistance with your products or services
- Have the following characteristics:
  - A status
  - A severity level
  - A priority level
- Are associated with a single owner

SR #:

Home Accounts Contacts Opportunities Quotes Sales Orders **Service**

Service Requests Home | **Service Requests List** | Service Request Charts | Service Requests - I

My Service Requests Menu New Delete Query

New	SR #	Status	Summary	Account	Owner	Priority
> *	1-625719	Open	Splitting territory in Siebel Sales	Art.net	SADMIN	3-Medium
*	1-2929237	Open	Siebel eAdvisor Issue of Bidabike	Bidabike	SADMIN	4-Low
*	1-2929265	Closed	Siebel Logistics Manager Issue of BT Whc	BT Wholesale Services and Solution	SADMIN	2-High
*	1-2929575	Closed	Siebel Web Objects Issue of Applicast	Applicast	SADMIN	2-High
*	1-2929813	Open	Siebel Field Service Issue of GEHE Group	GEHE Group	SADMIN	3-Medium
	1-1692980	Open	Migration Server Outlook Exchange	Marriott International France	SADMIN	3-Medium
	1-1104406	Open	Workflow Manager terminerar med error	Marriott International - Sverige	SADMIN	3-Medium
*	1-625717	Open	Customer promotion for email response	Marriott International HQ	SADMIN	3-Medium
	1-5180109	Open	Laptop is running slowly		SADMIN	3-Medium

# Assets

- Are instances of purchased products
- Have the following characteristics:
  - An asset number
  - A product and part number
  - A status level

Asset:

Home Sales Orders Service **Assets** Service Orders Opportunities Qu

List | Dispatch Board

All Assets ▾ Menu ▾ New Delete Query Transfer

Asset # ↕	Serial #	Product	Installed	Status	0
> 1-1293300	1-1293300	PCS Telephony PBX2	12/22/1999 4:00:00 PM	Production	
1-1293400	1-1293400	PCS Chev Desktop ES	11/5/1999 4:00:00 PM		
1-1293401	1-1293401	Monitor - 20" LCD	12/5/1999 4:00:00 PM		
1-1295501	1-1295501	PCS Chev Desktop ES	6/5/2001 5:00:00 PM		
1-1295505	1-1295505	Monitor - 20" LCD	9/5/2001 5:00:00 PM		
1-1295521	1-1295521	Guide - PCS CC Laptop	8/13/2001 5:00:00 PM		
1-1295525	1-1295525	PCS Chev Desktop ES	8/9/2001 5:00:00 PM		
1-1295529	1-1295529	Monitor - 20" LCD	8/16/2001 5:00:00 PM		
1-1295533	1-1295533	Monitor - 20" LCD	8/16/2001 5:00:00 PM		
1-1295537	1-1295537	Guide - PCS CC Laptop	7/16/2001 5:00:00 PM		

# Module Highlights

- Siebel CRM applications allow you to manage all customer points of contact
- Types of Siebel CRM enterprise applications are:
  - Employee applications: Siebel Call Center, Siebel Sales, and so on
  - Customer applications: Siebel eSales, Siebel Partner Portal, and so on
- Common Siebel business components include:
  - Accounts
  - Contacts
  - Opportunities
  - Service requests
  - Assets