Siebel 8.0 Essentials

Module 1: Introducing Siebel Applications

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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
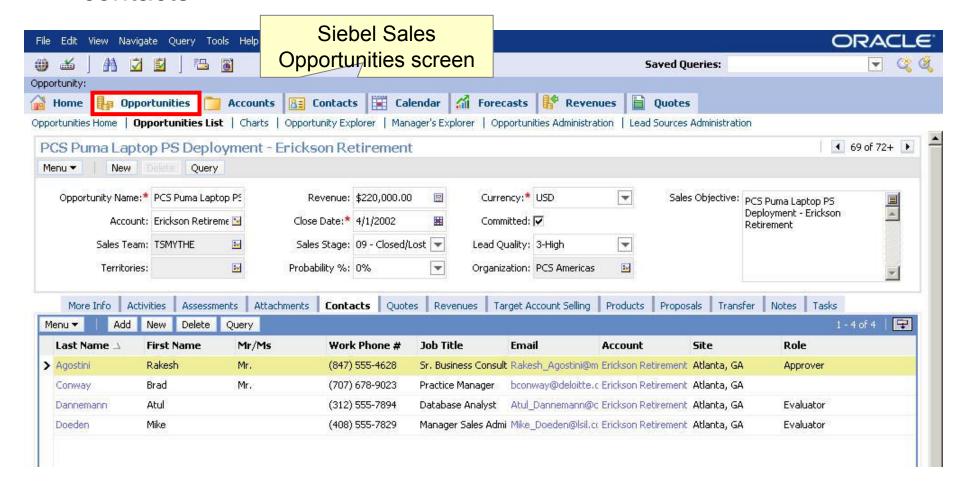   - Siebel Consumer Goods

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
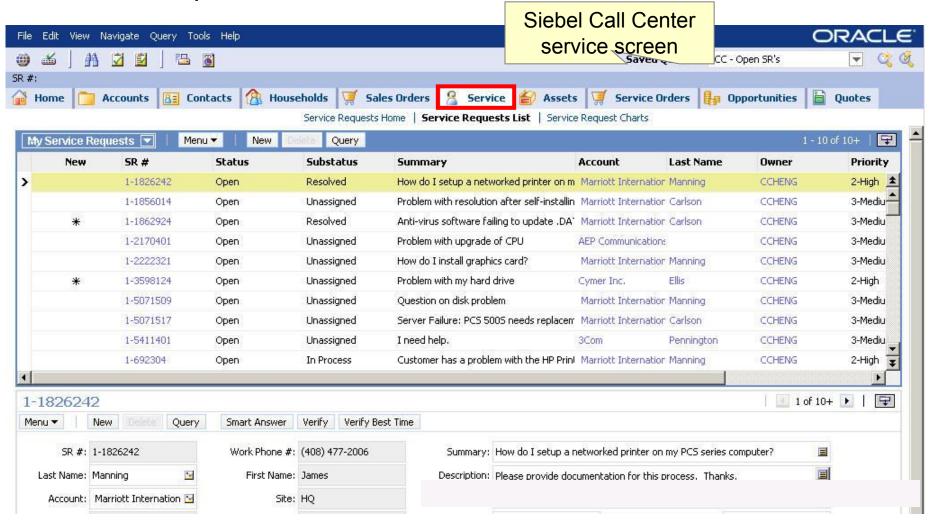   - Siebel Partner Portal

Employee Application: Siebel Sales

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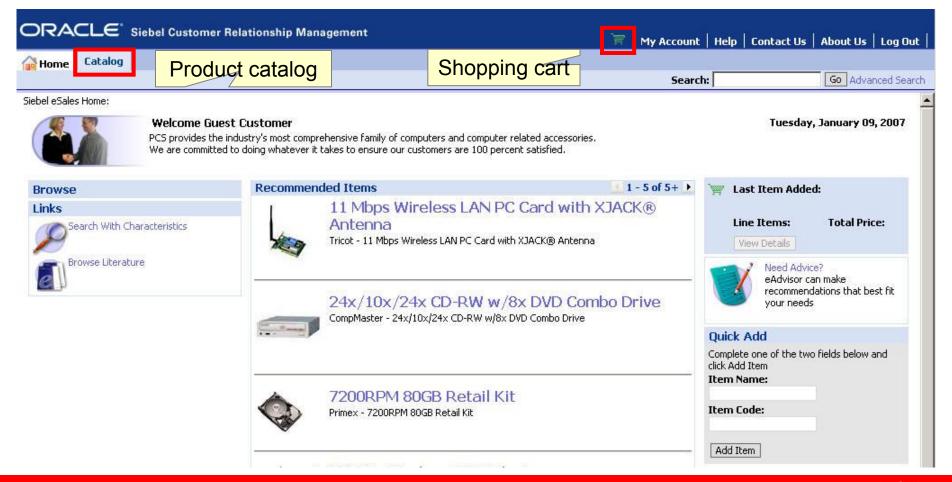

Siebel Sales Opportunities screen

Employee Application: Siebel Call Center

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

Siebel Call Center service screen
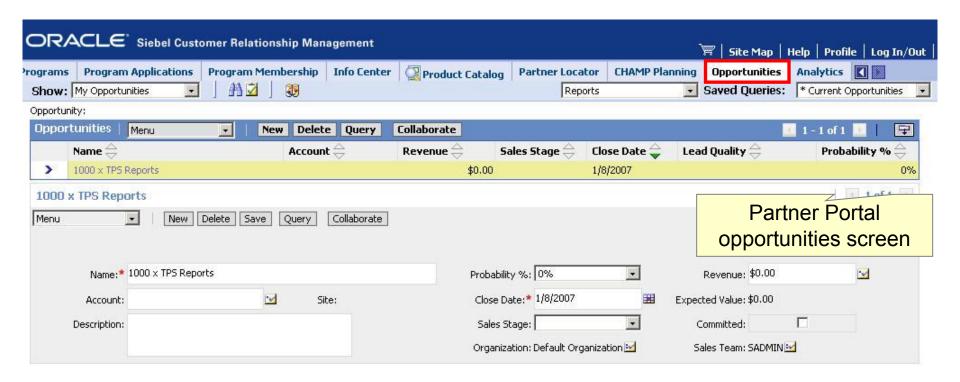
Customer Application: Siebel eSales

- 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

Partner Application: Siebel Partner Portal

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

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

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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)

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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
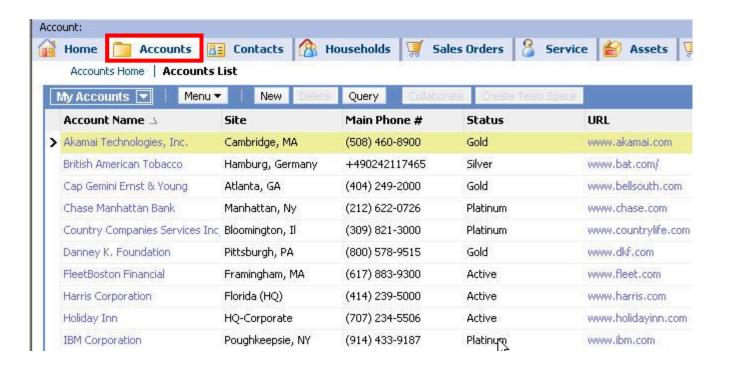
Accounts

Contacts

Opportunities

Service Requests
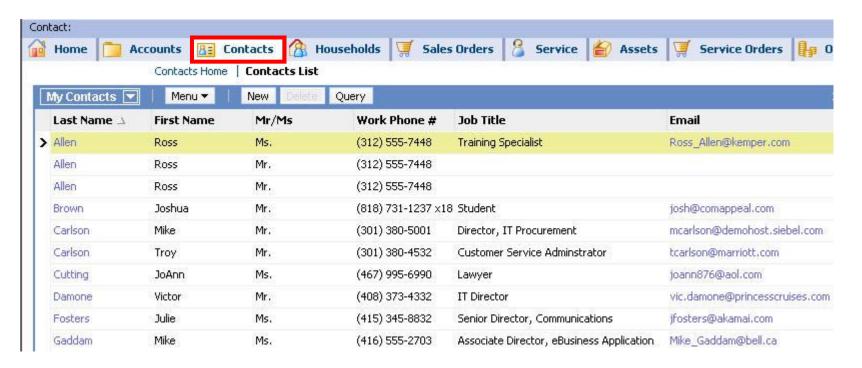
Assets

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Accounts

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

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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)

Opportunities

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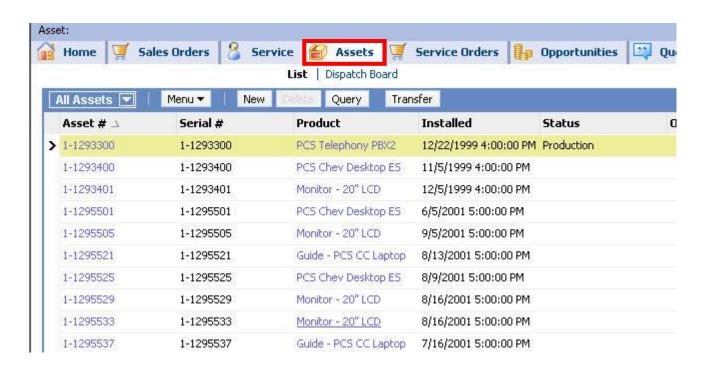- Are associated with a team

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

Assets

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

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