

# **Siebel CRM On Demand Online Help**

Release 15

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# 1 Getting Started

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Welcome to Oracle's Siebel CRM On Demand, the *smart* customer relationship management solution that you access over the Web. Siebel CRM On Demand helps you manage all your company's sales, customer service, and marketing information:

- If you're a sales professional, use Siebel CRM On Demand to optimize your sales efficiency and effectiveness by analyzing your sales strategy, forecasting more accurately, and sharing critical sales information across your team.
- If you're a customer service representative, use Siebel CRM On Demand to maximize your customer satisfaction and service performance by tracking accounts, managing service requests, identifying cross-selling and up-selling opportunities, and providing solutions to customer inquiries.
- If you're a marketing representative, use Siebel CRM On Demand to capitalize on your marketing efforts by generating more leads, assigning leads automatically, and quantitatively tracking campaign outcomes.
- If you're an executive, use Siebel CRM On Demand to manage all areas of your business by gaining insight into your sales' outlook, quickly resolving critical business issues, and performing complex analyses.

In Siebel CRM On Demand, your information is grouped into these main areas:

**Calendar and Activities.** Tracks your activities, including phone calls, events, and to-do lists.

**Campaigns.** Manages marketing campaigns and generates qualified leads and opportunities.

**Leads.** Tracks leads for new sales opportunities and automates the lead conversion process.

**Accounts.** Tracks companies with whom you conduct business.

**Contacts.** Tracks people associated with your accounts and opportunities.

**Opportunities.** Manages potential revenue-generating opportunities.

**Forecasts.** Generates forecasts to project quarterly revenue based on existing opportunities.

**Service Requests.** Manages customer requests for products or services.

**Solutions.** Stores answers to common questions or service issues.

**Communication.** Manages customer interactions through your call center (Call Center On Demand).

**Reports.** Generates a variety of reports supplying over 250 separate analyses, including pipeline visibility and sales effectiveness.

**Dashboard.** Displays a series of charts, graphs, and tables organized around your key business areas.

Additionally, industry-specific solutions contain these record types:

**Vehicles.** Tracks vehicle service and sales history (Siebel CRM On Demand Automotive Edition).

**Dealers.** Tracks associations with dealers (Siebel CRM On Demand Automotive Edition).

**Funds.** Manages fund requests, credits, and approvals (Siebel CRM On Demand High-Tech Edition).

**MedEd.** Manages medical education events and invitees (Siebel CRM On Demand Life Science Edition).

**Portfolios.** Tracks portfolio accounts (Siebel CRM On Demand Financial Services Edition).

**Households.** Tracks information for a group of related contacts (Siebel CRM On Demand Financial Services Edition).

**NOTE:** Your company administrator can rename the standard record types, so you might see different tab labels. For example, your administrator might change “Accounts” to “Companies.”

## What To Do First

Your administrator has probably imported company-wide records for accounts, contacts, leads, and so on. Follow these instructions to get you up and running quickly:

- [Signing In](#) (on page 21)
- [Updating Your Personal Details](#) (on page 306)
- [Displaying Your Tabs](#) (on page 316)
- [Importing Your Contacts](#) (on page 160)
- [Creating Records](#) (on page 32)
- [Finding Records](#) (on page 35)
- [Updating Record Details](#) (on page 48)
- [Linking Records to Accounts](#) (on page 141)

**TIP:** Click the Help link from any page for information regarding procedures, concepts, and guidelines specific to the record type you’re working with. From any Help window, you can access the PDF version of the help content, allowing you to print a range of topics or the entire help content.

**Note for first-time users:**

- You might not see data in reports for the first 24-hour period after signing in because most reports are updated nightly. For example, the reports appearing on the Accounts, Contacts, and Opportunities Homepages will not show data until after that initial period.
- You may not see forecasts, either, because forecast records are generated once a week or once a month. When generating forecast records, the system checks several fields in your records to determine which information to include in the forecast calculations. Therefore, forecast records don't appear until the specified period has elapsed and data exists to include in the forecast.

## About Running Other Applications

Other applications running in the background might interfere with Siebel CRM On Demand. For example, pop-up blockers can cause your mouse to lock. If you encounter some unconventional behavior, make sure these applications are *not* running:

- Virus checkers
- External Java Runtime Environments
- Pop-up blockers
- External toolbars for your browser

## Signing In

When your administrator adds you as a new user or you sign up for a trial period, Siebel CRM On Demand generates two emails, each with one item you need to sign in initially:

- The temporary URL you use to access Siebel CRM On Demand
- Your temporary password

**CAUTION:** Make a note of the User ID that appears on your Siebel CRM On Demand page. You need your user ID to access the application after the initial sign in.

### *To sign in the first time*

- 1 Click the Siebel CRM On Demand URL you received in an email.
- 2 On the Sign-In page, enter the temporary password you received in an email.
- 3 On the Change Password page, enter your temporary password and then your new password.

**TIP:** Be sure to write down your password to avoid repeating this process.

My Homepage appears with information you need to get started. The tabs and features you see by default depend on the role you are assigned by your administrator.

**NOTE:** If your status goes offline due to network connection issues, your login session automatically reconnects to the Siebel Call Center On Demand server once the system detects that the network is operational again.

## About the Interface

Siebel CRM On Demand is built around a Web page interface. If you are familiar with the Web, the look and feel of the user interface will be familiar to you.

All pages in the application share the same basic interface framework.

**TIP:** In the Internet Explorer browser, performance is better if the option Do not save encrypted pages to disk is cleared. If this option is selected, JavaScript code is not cached and must be downloaded every time. In Internet Explorer Version 6, this option is available under Tools > Internet Options > Advanced.

### Action Bar

The Action bar appears on the left side of your Web page. It contains these sections that help you perform your daily work quickly:

#### ■ Message Center

The Message Center section contains notes for yourself, notes received from other users, and notes added to the records to which you subscribe. For more information about the Message Center, see [Working with the Message Center](#) (on page 29).

The Message Center only appears if the company profile has Message Center enabled.

#### ■ Search

The Search section lets you find existing records. For example, you can perform a search to determine if a record exists before creating one, thereby reducing the duplication of records. For instructions on using the Search section, see [Finding Records](#) (on page 35).

#### ■ Call Center On Demand

If your company uses Call Center On Demand, the call center application, your access point is located in the Action bar through the Communication Tools and Voice Controls sections.

#### ■ Create

The Create section contains a list of links for record types. When you click a link, a popup form opens that allows you to quickly add a new record. The form works independently of the main Web pages so you won't lose your place within the application. For instructions on using the Create section, see [Creating Records](#) (on page 32).

### ■ Recently Viewed

The Recently Viewed section lists the 10 most recently viewed, edited, or created records, including records from previous sessions. Drilling down to the Detail page for a record triggers that record's inclusion in the Recently Viewed section. The record name appears in the list as a hyperlink along with an icon corresponding to the type of record it is.

This feature allows you to easily access your active records. If you delete a record, it is removed from the Recently Viewed list. If another user deletes a record, it remains in the Recently Viewed list, and if you select the hyperlink, a message is displayed informing you that the link no longer exists.

### ■ Favorite Records

This section contains the records that you have marked as your favorite records. The record name appears in the list as a hyperlink along with an icon corresponding to the type of record it is. This feature allows you to quickly access the records that you use most often. When you click the Show Full List link, the Favorite Records page opens, and you can manage your favorite records.

### ■ Favorite Lists

This section contains the records that you have marked as your favorite records. The list name appears in the list as a hyperlink along with an icon corresponding to the type of record. This feature allows you to quickly access the lists that you use most often. When you click the Show Full List link, the Favorite Lists page opens, and you can manage your favorite records.

### ■ Calendar

This section contains a calendar with the current date highlighted. When you click a date in the calendar, the Daily Calendar page is displayed for that date.

You can also add other sections to the Action bar:

- Any custom Web applet. Your administrator can make any HTML Web content (for example, polls, videos) and any RSS feed available in the Action bar. For more information about custom Web Applets, see [About Custom Web Applets](#) (on page 588).

You can change the layout of the Action bar and add additional sections to the action bar through the My Setup global link. For example, if the administrator has created an appropriate Web applet, you can add an RSS feed section to the Action bar. For more information, see [Changing Your Action Bar Layout](#) (on page 318).

The Action bar remains persistent when you move through the application, independently of the rest of the application. For example, in the middle of updating information in an account, you can create an opportunity in the Action bar. A form opens, you enter the required opportunity information in the form, and save the record. The new opportunity is saved to the database and you can continue updating the account information.

You can expand or collapse the sections in the Action bar as required. To collapse a section, click the - icon, and to expand the section, click the + icon.

### Tabs

Across the top of each page are tabs for the main types of records. Click on a tab to go to the Homepage for that record type. For example, if you click the Contacts tab, you go to the Contacts Homepage.

If you have more tabs than fit across your page (more than eight), an arrow appears next to the far right tab. Clicking on that arrow opens a drop-down list for you to select any tab available to you that is not currently visible.

To learn more about the tab layout, see [Displaying Your Tabs](#) (on page 316).

### Sections

Each page contains areas called *sections*. These sections group together relevant information for the types of records you're working with.

For example, the Accounts Homepage shows sections for Account Lists, Account-Related Tasks, Recently Modified Accounts, and the Account Analysis Chart.

A section can contain the following types of information:

- **Lists.** Shows records in rows.
- **Forms.** Shows fields for the records in a form.
- **Charts/Graphs.** Shows information in a variety of charts and graphs.

On Detail pages you can expand or collapse the whole form as well as the individual sections in the form. This is useful for avoiding a lot of scrolling and for hiding information in which you are not interested. To collapse a form or section, click on the - icon, to expand a section or form, click on the + icon. The buttons in each section are visible even when the section is collapsed. The expanded or collapsed state persists across sessions.

List pages and Edit pages do not have this expand and collapse functionality.

### Global Links

Each CRM On Demand page contains a series of links across the top. This table describes the action that occurs when you click each link:

Clicking this link	Does this
Training and Support	<p>Opens the Training and Support Homepage, which provides access to a range of Training and support resources, including the schedule of free Siebel CRM On Demand Webinars and other training courses.</p> <p>From this page you can create a service request. Make sure you have the following information:</p> <ul style="list-style-type: none"><li>■ Any error messages displayed in your window</li><li>■ A description of the problem, including the steps you were taking when the error occurred</li></ul>



Clicking this link	Does this
Admin	Opens the pages where administrators can customize the application. Appears only for those users assigned a role with administrative privileges.
My Setup	Opens the Personal Homepage, where you can update your personal profile and edit the page layout.
Deleted Items	Opens the Deleted Items page, where you can view and restore most deleted items up to 30 days after deletion.
Help	Opens online help at its top topic, displays the table of contents, and shows the Search tab to find information in the help files. From any help window, you can access the PDF version of the help content, allowing you to print a range of topics or the entire help content.
Sign Out	Exits the Siebel CRM On Demand application.

## Additional Links

Each page also contains several links that appear just to the right of the page name. This table describes the action that occurs when you click each of those links:

Clicking this link	Does this
Edit Layout	(Homepages and Detail pages only). Opens the Edit Layout page, where you can add, rearrange, or hide sections of the page you are viewing.
Help	Opens an online help topic specific to that page or procedure.
Printer Friendly	Opens the Print page, where you can print a version of data on your page. Available from all pages <i>except</i> Edit pages.

# Siebel CRM On Demand Page-by-Page Overview

Siebel CRM On Demand provides several Web pages for each record type (Accounts, Contacts, and so on).

## Homepages

Most Homepages show you tasks related to the types of records that correspond to that page, such as account-related tasks. Generally, they also show filtered lists that have been defined by your administrator as well as an analytic chart relevant to your work. Homepages can also contain Web widgets, RSS feeds, and other Web content, depending on what your company administrator has set up.

From the Homepage, you can drill down to other pages to manage the various types of information as required.

### List Pages

The List pages show the subset of records according to the list you select from the Homepage. From the List pages, you can:

- Review multiple records at a glance.
- Find a record to review, delete, or update.
- Update the fields on the List page inline, or click the Edit link to edit all the fields for a record.

### Manage Lists Pages

The Manage Lists pages show the standard filtered lists and the lists that either you created for your own use, or your manager created for employees to use. From the Manage Lists pages, you can:

- Delete a list
- Review the entire list of filtered lists
- Edit a list you or your managers created or begin the process for creating another filtered list.
- Select lists to add to the Favorite Lists section in the Action bar.

### Detail Pages

The Detail pages show one record's information. The top section displays the fields for that record and you can update these fields inline. The bottom sections are the linked record sections where you can create other records that are linked to the selected record, such as notes or activities, or review already linked records. You can also:

- Expand and collapse the sections in Detail pages as required.
- Click an icon on the Detail page to add the record to the Favorite Records section in the Action bar.
- Click the Note icon to add notes or view notes from other users.
- Send a note to another user by moving the pointer over the name of the user, see [Sending Notes to Other Users](#) (on page 74).

Detail pages can also contain custom Web applets set up by your administrator. These are used to embed Web widgets, RSS feeds, and other Web content on the page. For more information, see [About Custom Web Applets](#) (on page 588).

## Edit Pages

The Edit pages show one record's fields in editable format. You can use these pages to update the record information. The record fields on the Edit pages are identical to the top part of the Detail pages.

## My Homepage

From My Homepage, you can review the information for your work day. You can:

- Check your schedule for appointments in the Today's Calendar section.
- Review time-sensitive alerts that inform you of deadlines, such as submitting forecasts, in the Alerts section. Alerts are set up by your administrator.
- Scan the list of open tasks, sorted by due date and priority (up arrow for High, no arrow for Medium, down arrow for Low), in the Open Tasks section.
- Follow up on new records assigned to you after reviewing them from the New record section.

In the standard application, this section displays New Leads assigned to you. You or your company administrator can change what record type appears in this section.

- Review an analysis relevant to you.

In the standard application, this section displays an analysis of the quality of your opportunities for the current quarter (Pipeline Quality for Current Quarter). You or your company administrator can change what analysis appears in this section.

- View Web widgets, RSS feeds, and other Web content

Depending on what the company administrator has set up, and what is included in your page layout, you can view embedded Web content on My Homepage. This Web content might include Web widgets, such as Google maps or corporate videos, and RSS feeds. For more information about how external Web content is set up, see [About Custom Web Applets](#) (on page 588).

To perform these steps from My Homepage, follow these instructions:

To do this	Follow these steps
<b>Alerts</b>	
View all alerts	In the Alerts section, click the Show Full List link. The Alerts page opens.
View an alert	In the Alerts section, click the link for the alert. The Alert page opens with additional information about the alert.
<b>Appointments</b>	
Create an appointment	In the Today's Calendar section, click New. On the Appointment Edit page, fill in the required information and save the record.

To do this	Follow these steps
Review an appointment record	In the Today's Calendar section, click the Subject link of the appointment you want to review. The Appointment Detail page appears.
Review this month's appointments	In the Today's Calendar title bar, click the 31 icon. The Calendar opens with the month's schedule.
Review this week's appointments	In the Today's Calendar title bar, click the 7 icon. The Calendar opens with the week's schedule.
Review today's appointments	In the Today's Calendar section, click the View Calendar link, or the 1 icon. The Calendar opens with your appointments for today.
<b>Edit Layout</b>	To change the information that appears in two sections on My Homepage, click Edit Layout, and select other options from the shuttle drop-down lists.
<b>Recently Created Records</b>	In the standard application, this section pertains to Leads.
Create a record	In the New record title bar, click New. On the Edit page, fill in the required information, and save the record.  In the standard application, this section is for creating new leads.
Review a record	In the New record section, click the link of the record you want to review. The record Detail page opens.  In the standard application, this section is for reviewing leads.
Review the list of new records	In the New record section, click the Show Full List link. The record List page opens.  In the standard application, this section is for reviewing a list of leads.
<b>Reports</b>	
Slice the chart by another category	Depending on the analysis that appears, you might be able to click the drop-down list and change the selection. The chart and table show the data categorized by your selection.  In the standard application, you can do this with the Pipeline Quality for Current Quarter.
View the records comprising a segment in the chart or table	Depending on the analysis that appears, you might be able to drill down on a segment or link to view the records comprising that category.  In the standard application, you can do this with the Pipeline Quality for Current Quarter section.
<b>Tasks</b>	
Create a task	In the Open Tasks section, click New. On the Task Edit page, fill in the required information and save the record.
Review a task record	In the Open Tasks section, click the Subject link of the task you want to review. The Task Detail page appears.

# Reviewing Your Alerts

Company-wide alerts appear on My Homepage. Administrators use alerts to broadcast company-wide information, such as meeting notices and policy changes. If you are a sales representative whose information is included in your company's sales forecasts, you will receive an alert when the forecast has been generated as well.

## To review your alerts

- 1 Click the Home tab.
- 2 In the Alerts section, you can:
  - Click the link for the alert you want to review, if it currently appears on My Homepage.  
The Alerts page opens with additional alert information about that alert.
  - Click the Show Full List link.  
The Alerts (List) page opens where you can select an alert, select an option from the drop-down list to limit the types of alert records you see, or create your own filtered list for alerts.

Related Topics	
Alert Fields	545
Working with Lists	56

# Working with the Message Center

The Message Center in the Action bar allows you to manage effectively notes for yourself, notes from other users, and notes about records, all in one place. The Message Center therefore promotes more effective communication and collaboration within CRM On Demand.

The Message Center can contain:

- **Notes that you create for yourself.** You can create notes for yourself in the Message Center or in record Detail pages. This is useful for recording actions that you want to follow up on, or for information that you want to refer to later. These private notes are indicated by an icon showing a key.
- **Notes on records to which you subscribe.** You can keep track of conversations about a particular record, by navigating to the Detail page and subscribing to any new notes added on the record. You will then get a copy of all such notes in the Message Center, and you can reply to the record from the Message Center. You only get a copy of new notes added to the record; you do not get notes about other changes to the record.
- **Notes sent to you by other users.** Another user can click on the note icon next to your name in a page in the application and send a note to you. Notes sent to you in this way are indicated by an icon showing two people.

The Message Center contains a note (pushpin) icon and the number of new messages is displayed next to the note icon.

When you click the note icon in the Message Center, the list of notes is displayed. For each note, the name of the user who created the note is displayed, together with the subject or first part of the note text, if there is no subject. The date of the note is displayed, or if the note is from today, the time.

From the list of notes you can do the following:

To do this	Follow these steps
View a note	Scroll down to the required note. If the note is linked to a record to which you are subscribed, you can drill down on the record from the link in the note.
Create a new note	Click New Note. Type a subject on the first line if required, type the note, and click Save. The subject is optional; if you do not provide a subject, the first few characters from the text of the note are copied to the subject line.
Reply to a note	Scroll down to the required note, click Reply, and type your note. When you click Save, your reply is sent to the Message Center of the user who sent you the note. If you select Post, your reply is posted to the relevant Detail page, and is sent to all users subscribed to the record.
Delete a note	Scroll down to the required note, and click Delete. This action deletes the copy of the note from your Message Center, but does not delete the actual note on the record Detail page.
View details of the user who sent a note	Scroll down to the required note, and click the user name. The User Details page for the user is displayed.

You can embed the Message Center as a Web widget in other applications. For more information, see [Embedding a Message Center Widget](#) (on page 321).

When the Message Center is embedded as a Web widget, you can click the Refresh button to update the Message Center with the latest messages from CRM On Demand.

## Working with RSS Feed Applets

In CRM On Demand, you can use RSS feed applets to subscribe to frequently updated content in which you are interested, such as blog entries, news headlines, or podcasts. This content can, for example, supplement your CRM information with information from news providers to which you have subscribed. You might have general market news displayed in your homepage, and news and information specific to your client's employers within the Contacts detail page.

CRM On Demand has a feed reader built into the application, which aggregates content so that you never have to leave the application. For example, rather than having to visit other Web sites for market news, the information is delivered within the CRM On Demand application. In addition to aggregating content, the feed reader can accept user and record field parameters.

RSS feed applets are a type of custom Web applet, created by the company administrator, in which the URL for an RSS feed is specified. RSS feed applets can therefore appear in the following places:

- My HomePage
- Record type homepages
- Record type Detail pages
- The Action bar

For more information about custom Web applets, see [About Custom Web Applets](#) (on page 588).

You must add the applet to the homepage layout, detail page layout, or Action bar layout, if it does not already appear on the page or Action bar.

Your company administrator can specify that an RSS feed applet is configurable. If this is the case, a Configure link is displayed with the applet, and you can change the name of the applet and the URL associated with the applet so that a different RSS feed is displayed. If an RSS feed applet is not configurable, the Configure link is not displayed.

**Your company administrator will only make a few RSS feed applets configurable.**

If the company administrator deletes an RSS feed applet, the customized versions of the applet are also deleted from the application. For example, if a user has an applet for a CNN news feed on his homepage, and another user has configured the applet for an NBC news feed on her homepage, both users lose access to the applet feed if the original RSS feed applet is deleted.

### ***To configure an RSS feed applet***

- 1** Click the Configure link.
- 2** In the Name field, type an appropriate name for the applet.
- 3** In the URL field, edit the URL as required.
- 4** Click Save.

The feed is refreshed with data from the configured URL.

**Note:** You can click [Use Default](#) to return to the URL as defined by the company administrator.

## Working with Records

This section describes common procedures you can do with most records. Click on the topic to see step-by-step instructions to do the following:

- [Creating Records](#) (on page 32)
- [Finding Records](#) (on page 35)
- [Updating Record Details](#) (on page 48)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Working with Lists](#) (on page 56)
- [Creating and Refining Lists](#) (on page 59)
- [Exporting Records in Lists](#) (on page 66)
- [Transferring Ownership of Records](#) (on page 67)
- [Updating Groups of Records](#) (on page 69)
- [Merging Records](#) (on page 70)
- [Adding Notes](#) (on page 71)
- [Attaching Files and URLs to Records](#) (on page 74)
- [Deleting and Restoring Records](#) (on page 79)
- [Printing Information That Appears on Pages](#) (on page 85)

## Creating Records

You can create a record from different areas within the application. The area you choose depends on whether you want to:

- Create the record in a popup window that is independent of the records you are working on. You will not lose your place in the main area of the application.
- Create the record from clicking the New button on the Homepage, List, or Detail page. Each of these pages opens the same form as the other methods, but it shifts the focus from your current page to the Edit page. You will need to use the Back link to return to the page you were working on.
- Create the record for a different record type that is automatically linked to the record you are currently working on.

**NOTE:** You can also add new records by importing records from external CSV files or by synchronizing with other applications. The type of records you can import depends on the privileges assigned to your user role.

**TIP:** To prevent record duplication, search for the record before creating a new one, see [Finding Records](#) (on page 35).



***To create a record using the Create section***

- 1 From any page, go to the Create section in the Action bar.
- 2 From the list, click the link for the record type.
- 3 In the New record form, fill in the required information.
- 4 Save the record.

***To create a record from the Homepage, List, or Detail page***

- 1 From any of these pages, click the New button in the title bar.
- 2 On the Edit page, fill in the required information.
- 3 Save the record.

***To create a record that is linked to the selected record***

- 1 Select the record.  
For instructions on selecting a record, see [Finding Records](#) (on page 35).
- 2 On the record Detail page, scroll down to the appropriate section.
- 3 On the title bar for that section, click the New or Add button.
- 4 On the Edit page, fill in the required information.
- 5 Save the record.

**Entering Information in Records**

When you create records you can enter information directly into some fields, or select values from a drop-down list. In addition, for some fields you can click an icon to the right of the field to display a window from which you can select values or enter values. The icons that you can click are:

- **Phone icon.** Allows you to enter the details of a telephone number.
- **Calendar icon.** Allows you to select a date.
- **Currency icon.** Allows you to search for, and select a currency.
- **Lookup icon (magnifying glass).** Allows you to search for, and select a record, or multiple records, which will be associated with the record you are creating. The Lookup icon is also used for selecting values for multi-select picklist fields.

### About Multi-select Picklists

A multi-select picklist is a picklist from which you can select multiple values. When you click the Lookup icon for a multi-select picklist, a pop-up appears, which allows you to select the required values by moving values from an Available list to a Selected list. You can also sort the values in the Selected list.

Multi-select picklists are supported for the following record types:

- Accounts
- Contacts
- Opportunities
- Leads
- Activities
- Service Requests
- Custom Object 1
- Custom Object 2

### About Phone Number Fields

Phone fields have a phone icon next to them. Clicking on the icon opens a phone verification window, which allows you to determine if the application has correctly identified the number: country code, city/area code, local number, and any extension for the number.

When you close the phone verification window, or save the record, the application adjusts the phone number for international calls so that you see the entire sequence you need to dial. For example, if your Locale setting is English - United States and you enter a number for Spain (Country, City, and Local numbers), the application adds the international access code of 011 to the phone number.

Additionally, if you want to determine the country code for a country, you can click the phone icon, select the country, and save the information. The country code for the country displays in the Phone field.

### About Address Fields

For addresses, the application displays different fields to accommodate country-specific information. For example, if you select Japan as the Country for an account's billing address, the other address fields change to those fields needed for Japanese addresses, such as Chome, Ku, and Shi/Gun.

In general, addresses are stored with the specific record type. However, some addresses are carried over when you link one record with another. For example, if you enter a billing and shipping address for an account, the billing address appears on the Contact Detail page when you link the account to the contact.

If your company administrator has added the Addresses section to your application, you can track additional addresses for such records as accounts and contacts. When tracking addresses

for contacts, the primary address is always the one you entered in the Alternate address section.

## Finding Records

You can find a specific record, such as an account, contact, or opportunity, by using any of these methods:

### ■ Search section in the Action bar

The Search section, located in the top left corner, is a quick way to find a record that already exists. Before creating a new account, contact, and so on, it is a good idea to determine if it already exists.

### ■ Lookup windows for some fields

When entering record information, you might see the Lookup icon next to a field. This indicates that you can select an existing record to fill in the field rather than type in the information.

### ■ List page for the record type

All record types have a list page where you can view a subset of records or sort records.

## Using the Search Section to Find Records

The first field in the Search section in the Action bar contains the record type to search. You can select All to search all record types or alternatively you can select an individual record type. You can set the default record type for the Search section, see [Setting Your Default Search Record Type](#) (on page 311) for more information.

Apart from the record type field, the Search section can contain multiple or single fields for specifying search criteria, depending on what your company administrator has set up:

### ■ Multiple text fields - used for a *targeted search*

If your Search area shows several fields for you to specify values to match, the system checks those fields and displays records that match all the values you specify. If you specify values in more than one field, only records that match for all of those fields are returned (equivalent to an AND condition).

### ■ Single text field - used for a *keyword search*

If your Search area shows a single field for you to specify a value to match, the system checks the default fields for the record type to find matches. The search criteria are matched against any of the default fields (equivalent to an OR condition against the default fields).

Targeted search works as if a wildcard were added to the end of what you enter in the fields. So, for example, if you enter c in a Last Name field, all records in which the Last Name begins with C are returned in the search results (this improves query performance). Keyword search

and searching 'All' records works as if a wildcard were added to both the beginning and end of what you entered (this results in a slower query).

The default fields that are shown in the text fields for a targeted search, and the fields that are used to find matches in a keyword search are the same, see [Default Search Fields](#) (on page 40) for a list of these fields for each record type.

Searches on text-based fields are case insensitive, unless the <case sensitive> grayed-out text appears on the input field (this text disappears when the user clicks on the field).

The Search section also contains a link to the Advanced Search page, which allows you to search on several record types at once, search on dates, and provides better filtering capabilities. For more information, see [Using Advanced Search](#) (on page 38).

For targeted search only, a Look in selector may be displayed, which allows you to narrow the search to the records belonging to a particular user or book. For more information, see [Using the Look In Selector](#) (on page 47).

If you search on a single record type, the search results are displayed in a List page, and you can then work with the list of records. You can further refine the list using the list management features of CRM On Demand, and you can save search results as a new list. For more information about managing lists of records, see [Working with Lists](#) (on page 56).

If you search on all record types, a Search Results page is displayed with different sections for each type of record found in the search.

### *To find a record using the Search section*

- 1 From any page, go to the Search section in the top left corner.
- 2 To search on All record types or to narrow the search to just a single record type:
  - a From the drop-down list, select All (for a slower query) or a record type (for a faster query).
  - b Depending on your setup, you can enter the value to search for in either a single text field or in several text fields.
  - c Click Go.
- 3 Click the link in the record you want to work on.

This opens the Detail page for that record.

## Using the Lookup Window to Find Records

When you click the Lookup icon next to a field, a Lookup window appears in which you can search for and select records. In some cases you can only select one record, and in other cases you can select multiple records. When you select a record, an association is automatically created with the main record that you are creating. An association can be a single association or a multiple association, if you can select more than one record. After you select a record, the name of the associated record is displayed in the field.

The appearance of the Lookup window depends on whether there is a single association or a multiple association. If there is a single association, one list of records is displayed and you can select a single record. If there is a multiple association, two lists are displayed, a list of available records and a list of selected records.

The appearance of the Lookup window also depends on whether keyword search or targeted search is enabled for your company:

- **If keyword search is enabled.** A single text field is displayed and you can enter search criteria and click Go to refine the list of records.
- **If targeted search is enabled.** Quick Filter search fields are displayed to the right of the Show results where label. You can enter search criteria and click Go to refine the list of records. An Advanced link and a Look in selector are also displayed.

In the Lookup window, a Look in selector may be displayed, which allows you to narrow the search to the records belonging to a particular user or book. For more information, see [Using the Look In Selector](#) (on page 47).

Depending on the record type, there may be an additional drop-down list in the top left-hand corner of the window. For example, in the Task Edit page, if you select a valid value in the Account field and you open the Lookup window for the Contacts field, there is a drop-down list with two values: Contacts for Related Account and All Contacts. When you click the Go button, the value you select in the drop-down list is used in refining the list of records.

### *To search for records using the Lookup window*

- 1 Click the Lookup icon next to the field.
- 2 The Lookup window appears containing a list of the available records.

In the Lookup window, you can:

- If targeted search is enabled, use a Quick Filter Search to filter the list, see [Filtering Lists](#) (on page 63).
- If targeted search is enabled, click the Advanced link to filter the list, this is similar to [Using Advanced Search](#) (on page 38).
- Click New to create a new record, which will be added to the list.
- Click the Next or Previous links to page through the list to find the record.

- 3 Click the Select link to select the records you require and click OK.

In cases where you can select more than one record, click Select for each record that you require. The records are moved from the Available Records list to the Selected Records list.

**NOTE:** In the Lookup window, click **Clear Current Value** to remove already-selected information and leave the field blank. The **Clear Current Value** button is not available if Smart Associations is turned on.

### Finding a Record from the List Page

Use the following procedure to find records in a list page. For more information about finding records in a list page, see [Filtering Lists](#) (on page 63).

#### *To find a record in the List page*

- 1 Click the tab for the type of record you want to find.
- 2 On the record Homepage, select the filtered list that would include the record you are trying to find.  
  
You can also get to the required list from the Favorite Lists section in the Action bar, if it is available there.
- 3 On the List page, you can:
  - Use an Alpha Search to find the record
  - Use a Quick Filter Search to find the record.
  - Click Previous or Next to page through the list.
- 4 Click the link in the record you want to work on.  
  
This opens the Detail page for that record.

### Using Advanced Search

You can use advanced search to:

- Search on one or more record types at once
- Search for records on dates
- Search on all of the fields for a record type
- Search using filter criteria for each field

If you search on a single record type, the search results are displayed in a List page, and you can then work with the list of records. For more information about managing lists of records, see [Working with Lists](#) (on page 56).

If you search on all record types, a Search Results page is displayed with different sections for each type of record found in the search.

***To perform an advanced search*****1** In the Select Record Types section:

- Select All Record Types to search on all record types (this is a slower query).
- Select the following record types radio button, and click the appropriate check boxes to search on one or more record types.

The sections available in the Advanced Search page change according to whether you select a single record type or multiple record types for searching.

**2 For multiple record type searches.** In the Keywords field, enter the full or partial name you want to search for or leave it blank to search strictly on the basis of the dates you provide.

**NOTE:** In the Keywords field, it is not necessary to use a wildcard (\*) for a partial word, because a wildcard is automatically added to the beginning and end of the user input.

**3 For multiple record type searches.** If required, enter the date range (use four digits for the year, such as 2003):

- For Appointments, the date applies to Start Time (Date).
- For Tasks, the date applies to Due Date.
- For Opportunities, the date applies to Close Date.
- For all other record types, the date applies to the Created date.

**4 For single record type searches.** In the Search In section, select one of the following from the drop-down list.

- **All records I can see.** Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role, and the access level for shared records.
- **All records I own.** Includes only records in the filtered list that:
  - You own
  - Are shared with you by the owner through the Team feature
  - Are shared with you through the group assignment feature (for tasks, accounts, contacts, and opportunities)
- **All records where I am on the team.**
- **All records I or my subordinates own.**
- **All records where I or my subordinates are on the team**
- **My Default Look In.** Your default setting for the Look in selector, as defined by your company administrator.

- 5 For single record type searches.** If the Book feature is enabled for your company, select a book, user, or delegate from the Look in selector, if required.

For more information, see [Using the Look In Selector](#) (on page 47).

The Search In section is not displayed for record types that do not have owners (for example, Products, Users).

- 6 For single record type searches.** In the Enter Search Criteria section do the following:

- a** Select a field from the Field drop-down list.

The fields are pre-populated with the targeted search fields for the record type, see [Default Search Fields](#) (on page 40).

- b** Enter the conditions, filter values, and operators (AND, OR) that define the filter.

For information about using filter conditions, see [About Filter Conditions](#) (on page 42).

**CAUTION:** When entering Filter Values, check to make sure you follow the rules described in [About Filter Values](#) (on page 46). Otherwise, you might not find the correct records.

### Examples

**Accounts:** If you want to create a filtered list of accounts in Canada with annual revenue over \$100,000,000.00, complete the form as follows:

Field	Condition	Value(s)	
Annual Revenue	Greater than	100000000	AND
Country	Equal to	Canada	

**Leads:** If you want to create a filtered list of leads with potential revenue over \$100,000.00 and ratings of A or B, complete the form as follows:

Field	Condition	Value(s)	
Potential Revenue	Greater than	100000	AND
Rating	Less than	C	

- 7** Click Go.

The results appear for each record type.

## Default Search Fields

The following table lists:

- Fields that the application includes in the search for a keyword search
- Fields that you can use to limit your search for a targeted search



For this record type	These fields are searched
Account	Account Name, Location
Contact	First Name, Last Name, Email
Lead	First Name, Last Name, Company, State (for USA)
Solution	Solution ID, Title
Campaign	Campaign Name, Source Code
Appointment	Subject
Task	Subject
Opportunity	Opportunity Name
Service Request	SR Number, Subject
Product	Product Name, Product Category, Part #, Status
User	First Name, Last Name, Email
Fund	Specific to High Tech Edition: Name, Status
Fund Request	Specific to High Tech Edition: Name, Status
Household	Specific to Financial Services Edition: Household Name
Portfolio Account	Specific to Financial Services Edition: Account Number
Dealer	Specific to Automotive Edition: Name, Location
Vehicle	Specific to Automotive Edition: Serial Number
MedEd Event	Specific to Life Sciences Edition: Name, Location

## About Filter Conditions

For searches, different filter conditions are available depending on the data type of the search field, as shown in the following table.

Data Type	Filter Conditions Available
Number, Integer, Percent, Currency	<ul style="list-style-type: none"><li>Between</li><li>Equal to</li><li>Greater than</li><li>Less than</li><li>Is NULL</li><li>Is not NULL</li><li>Not equal to</li><li>Not Between</li></ul>
Date, Time	<ul style="list-style-type: none"><li>Between</li><li>Equal to</li><li>In the last 90 days</li><li>In the next 90 days</li><li>On</li><li>On or after</li><li>On or before</li><li>Today *</li><li>Yesterday*</li><li>Tomorrow*</li><li>In the last ? day</li><li>In the next ? day</li><li>Last Week*</li><li>Next Week*</li><li>This Week*</li><li>Last Month*</li><li>Next Month*</li><li>This Month*</li><li>This Quarter*</li><li>Last Quarter*</li></ul>

Data Type	Filter Conditions Available
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Next Quarter*</li> <li><input type="checkbox"/> This Year*</li> <li><input type="checkbox"/> Next Year*</li> <li><input type="checkbox"/> Last Year*</li> <li><input type="checkbox"/> Is NULL*</li> <li><input type="checkbox"/> Is Not NULL*</li> <li><input type="checkbox"/> Not equal to</li> <li><input type="checkbox"/> Not Between</li> </ul> <p>For conditions marked with an asterisk (*), the value field is disabled when the condition is selected.</p> <p>For the condition In the last ? day, and In the next ? day, the variable ? is substituted with a number of days selected in the filter value field.</p>
Checkbox	<ul style="list-style-type: none"> <li><input type="checkbox"/> Is checked</li> <li><input type="checkbox"/> Is not checked</li> </ul>
Picklist	<ul style="list-style-type: none"> <li><input type="checkbox"/> Contains all values</li> <li><input type="checkbox"/> Contains at least one value</li> <li><input type="checkbox"/> Contains none of the values</li> <li><input type="checkbox"/> Equal to</li> <li><input type="checkbox"/> Is NULL</li> <li><input type="checkbox"/> Is not NULL</li> <li><input type="checkbox"/> Not equal to</li> </ul>
Text	<ul style="list-style-type: none"> <li><input type="checkbox"/> Between</li> <li><input type="checkbox"/> Contains all values</li> <li><input type="checkbox"/> Contains at least one value</li> <li><input type="checkbox"/> Contains none of the values</li> <li><input type="checkbox"/> Equal to</li> <li><input type="checkbox"/> Greater than</li> <li><input type="checkbox"/> Less than</li> <li><input type="checkbox"/> Is NULL</li> </ul>

Data Type	Filter Conditions Available
	<ul style="list-style-type: none"> <li>■ Is not NULL</li> <li>■ Not equal to</li> <li>■ Begins with</li> <li>■ Does not begin with</li> <li>■ Is Like</li> <li>■ Is not Like</li> <li>■ Not Between</li> </ul>
Phone	<ul style="list-style-type: none"> <li>■ Begins with</li> <li>■ Between</li> <li>■ Contains all values</li> <li>■ Contains at least one value</li> <li>■ Contains none of the values</li> <li>■ Equal to</li> <li>■ Greater than</li> <li>■ Less than</li> <li>■ Not equal to</li> </ul>

## How Filter Conditions Are Used

The following table shows how various filter conditions and operators are used:

Use This	With	To Match	For These Results
Between	Numbers or dates	Two values separated by commas	Displays records with values between A and B (excludes values equal to A and B).
Contains all values (equal to)	Text, numbers, or dates	Single or multiple values separated by commas	Displays records matching the exact values. The application does not retrieve substrings of the values, or the same value with different capitalization (uppercase or lowercase).

Use This	With	To Match	For These Results
Contains at least one value	Text only	Single or multiple values separated by commas	<p>Displays records that partially match the values (allows substring matching). For example, entering <i>Brown</i> retrieves records with <i>Browns Trucking</i>, <i>Browning Equipment</i>, and <i>Lester Brown Car Wash</i>.</p> <p><b>NOTE:</b> This behavior applies to filtered lists only, and not to other areas in Siebel CRM On Demand that use the condition Contains At Least One Value.</p> <p>Also, using this condition affects the speed at which the records are retrieved, because the system looks for partial matches.</p>
Contains none of the values (not equal to)	Text, numbers, or dates	Single or multiple values separated by commas	Displays records <i>not</i> matching the values. This is the inverse of <i>Contains all values</i> .
Equal to	Text, numbers, or dates	Single value for each line. To add values, use the operator OR and add another line.	Displays records matching the values.
Greater than	Numbers or dates	Single value	Retrieves records with a value greater than the entered value.
Less than	Numbers or dates	Single value	Retrieves records containing a value less than the entered value
<i>Operator</i>			
AND	Text, numbers, or dates	Two or more conditions	<p>Displays records for which all given conditions are true.</p> <p>For example, entering Close Date &gt; 10/01/2003 AND Revenue &gt; 500000 will return records that match <i>both</i> criteria.</p>
OR	Text, numbers, or dates	Any condition	<p>Displays records for which at least one condition is true.</p> <p>For example, entering Industry = Energy OR Billing State=CA returns records that match <i>either</i> of these criteria.</p>

### About Filter Values

When you search for records, depending on the filter condition that you choose, you must enter a filter value.

When entering filter values for a search, make sure you follow these rules:

- For numeric values, use commas to separate values, and not to indicate values in thousands.
- You can use partial words with the condition Contains At Least One Value, but using partial words with the other conditions does not retrieve the records you want.  
**NOTE:** This behavior applies to filtered lists that use the condition Contains At Least One Value, and not to other areas in Siebel CRM On Demand .
- For dates, enter them in the format your company uses but include four digits for the year, such as 2003.
- For currency, omit commas and symbols, such as the dollar sign (\$).

### Using Wildcards with Filter Values

You can use the wildcard characters (\* and ?) in searches of text and phone fields only where the filter condition is Begins with.

**CAUTION:** Using the asterisk character (\*) might result in slow performance if used with large amounts of data.

You can use wildcards in the following types of search:

- The Search Criteria section in Advanced Search
- The Search Criteria section in the Create List and Refine List pages
- Alpha Search on List pages
- Quick Search on List pages
- The Search section in the Action bar

For telephone number fields, you can, for example, search for all telephone numbers of a certain area code. To do this, click the phone icon, and in the Phone Number pop-up, enter the area code and then the asterisk (\*) wildcard in the Local Number field.

### About Searching on Multi-Select Picklists

You can search and query on all of the values of a multi-select picklist field.

Multi-select picklist fields are supported as columns in target search results and in target search filter criteria.

The following list shows how the multi-select picklist values in the filter criteria and the filter condition determine which records are found in the search:

- **Contains all values.** A record is found if all the specified filter values match the multi-select picklist values of a searched record.
- **Contains at least one value.** A record is found if any of the specified filter values match the multi-select picklist values of a searched record.
- **Contains none of the values.** A record is found if none of the specified filter values match the multi-select picklist values of a searched record.

## Using the Look In Selector

The Look In selector allows you to narrow your searches to particular users or books.

The Look In selector is displayed in:

- The Search section in the Action bar
- The Lookup window
- The Search In section in advanced searches
- List pages
- Reports Homepage and dashboard

The Look in selector is displayed only if:

- Display Look In Selector is enabled in your company profile, and,
- The Look in selector is supported for the relevant record type. The record types that support the Look in selector are:
  - Account
  - Activity
  - Campaign
  - Contact
  - Custom objects (1,2,3)
  - Dealer
  - Fund
  - Fund Request
  - Household
  - Lead
  - Med Ed
  - Opportunity
  - Portfolio
  - Sales Assessment
  - Service Request
  - Vehicle

The Look In selector allows you to restrict your search based on two criteria, by user and by book. The Look in selector therefore displays a hierarchy of users and a hierarchy of books, with All at the top of the hierarchy. You can expand and collapse each level in the hierarchy. Most employees will only see a hierarchy of users, as the book feature is not enabled by default.

For analytics, the book hierarchy is displayed only if Full Visibility is selected in the Historical Subject Areas setting in the company profile.

When you select a book, and sub-books for the book are displayed in the hierarchy, all of the sub-books are included in the search.

**CAUTION:** For optimal performance, include sub-books only when absolutely necessary.

Each user has a set of default books. If you select All, all of the books applicable to you and your subordinates (if any) are selected.

Within the User hierarchy you can choose users that have delegated their access to you or users in your organization.

After you select a book or user, and click OK, the name of the book or user is displayed in the Look in selector. The + symbol indicates that children in the hierarchy are also selected.

You can use the Include Sub-Items check box to control whether sub-books or subordinates are included in the respective hierarchy.

## Updating Record Details

Generally, you can update record information if you own the record, you manage the owner of the record, or the owner grants you editing access to the record. However, you can adjust access levels to restrict or expand a user's access.

Also, for solution records, your user role must include the Publish Solutions privilege.

You can update records in the following ways:

- By editing fields inline on full List and Detail pages. Inline editing is available only on full List pages, and not filtered list pages.
- By updating the record in the Edit page. You can reach the Edit page by clicking the Edit link for a record in the List page, or the Edit button for a record in the Detail page.

Your company administrator can enable or disable inline editing in the company profile. By default, inline editing is enabled.

**NOTE:** Sometimes, when you edit a field inline, you may be prompted to navigate to the Edit page to complete the edit. This happens if there are further required fields that you must edit, or if there is a business process attached to the field that you were editing inline.



***To update fields inline***

- 1 On the record full List page, or record Detail page, move the pointer over the field that you want to update

An edit icon appears on the right-hand side of the field. A different icon appears depending on the type of field. On a Detail page, if a field is read-only, when you rest the mouse on the field, no information is displayed. Nothing happens when you click the field. On a Full List page, if a field is read-only, when you pause the pointer on the field, information is displayed. Also, a read-only Inline Editor is displayed when you click the read-only field.

- 2 Click the edit icon or click the field to enable the Edit mode for Inline Edit.

For some of the fields, clicking the fields is different from clicking the edit icon. If you click a Phone field, for example, the field displays a Text editor and allows you to enter the phone number directly. If you click the edit icon, it displays a Phone editor and allows the user to specify the Country, Area Code, Phone Number and Extension separately.

- 3 Update the value of the field.
- 4 Click the green check mark icon or press Enter to save the changes.

To cancel changes, click the red cross icon or press the Esc key.

You can also use the Edit page to update fields.

***To update record details in an Edit page***

- 1 On the record List page, click the Edit link for the record, or from the Detail page click the Edit button in the title bar.
- 2 On the record Edit page, update the necessary information.
- 3 Save the record:
  - To save this record and then open the record Detail page (where you can link information to this record), click Save.
  - To save this record and then open the Edit page (where you can create another record), click Save & New.

## Linking Records to Your Selected Record

You can link records to the record you are currently working on. You can create links when you create or update a record, and you can also add links from the Detail page for a record. Linking of records is referred to as *smart associations* in Siebel CRM On Demand.

Linking associates records with each other so that you and others who have access rights to the record have a full view of the information.

### About Single and Multiple Associations

There can be single or multiple associations between records. For example, if your company administrator has enabled multiple associations, you might link multiple contacts with a task, as you are creating or editing the task. On the Task Edit screen, when you click the Lookup icon on a Contact fields, the Lookup window is pre-filled with contacts associated with the account that was specified for the task. You can then select one or more contacts in this Lookup window to associate those contacts with the task. This capability is not available for all associations; it only exists for certain configured association controls. For example, if the Account field in a Task record has a valid value, and you click the Lookup icon for Opportunities, the window is not pre-filled with records, but you can select a list of opportunities from the drop-down list.

### Automatic Resolution of Field Values

When you are searching for records, and where there is a single association, you can type in the name of the associated record and the application automatically attempts to resolve the association. For example, when creating a task, you can type in the account name field. When you save the field, the application automatically searches for accounts that match. If a unique match is found, the appropriate account is used. If no matches or multiple potential matches are found, you are presented with a Lookup window where you can perform additional searches, and select the appropriate account.

### Linking Records from the Detail Page

From a record Detail page, the application lets you do one of the following:

- Link (associate) an existing record or records.
- Create a new record that is automatically linked to the main record.

New records are added to the database at the same time that they are linked to the selected record. For example, an activity you create from the Lead Detail page is linked to the lead, and then appears in the Activities pages.

#### *To link an existing record to your selected record*

- 1 Select the main record (the record that you want to link new records to).  
For more information on selecting records, see [Finding Records](#) (on page 35).
- 2 On the record Detail page, scroll down to the appropriate section, and click Add.
- 3 Click the Lookup icon next to the field.
- 4 The Lookup window appears containing a list of the available records.

- 5 In the Lookup window, you can:
  - Use a Quick Filter search to filter the list, see [Filtering Lists](#) (on page 63).
  - Click the Advanced link to filter the list, which is similar to [Using Advanced Search](#) (on page 38).
  - Click the Next or Previous links to page through the list to find the record.
  - Click New to create a new record, which will be added to the list.
- 6 Click the Select link to select the records you require, and click OK.

In cases where you can select more than one record, click Select for each record that you require. The records are moved from the Available Records list to the Selected Records list.

The selected record or records appear appears in the Detail page.

#### *To create a new record and link it to your selected record*

- 1 Select the main record (the record that you want to link new records to).

For more information on selecting records, see [Finding Records](#) (on page 35).
- 2 On the record Detail page, scroll down to the appropriate section, and click New.
- 3 In the Edit page, create a new record that is linked to the main record.

#### *To remove or delete a linked record*

- 1 Select the main record.

For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2 On the record Detail page, scroll down to the appropriate section.
- 3 In the row whose link you want to remove or delete, click one of these links:
  - **Remove.** This link disassociates the records without deleting either of the records.
  - **Del.** This link deletes the linked record. A deleted record is moved to the Deleted Items page and is permanently removed from the database after 30 days.

## Records Types Linked to Other Record Types

The following table shows some record types that you can link to other records in the standard application. In the Information column, instructions on how to link the record type from the Details page of the main record are given.

The record types that you can link to your selected record depend on the type of record you are working with, as well as the customization that you or your managers have made to the standard application.

Record Type	Information
Account	<p><b>In the standard application, this section is available for contacts. You might need to add the section to your layout:</b></p> <p>To link an existing account and track the role it plays in relation to the contact, click Add. On the Add Account page, select an account, select the role it plays for this contact, and click Save. If the account you want to add does not exist, you can add it by clicking New in the Search for an Account window. For field descriptions, see <a href="#">About Accounts</a> (on page 135).</p> <p>If the account has more than one role, click Add Roles in the appropriate row, select the roles, and save the record.</p>
Account Relationships	See <a href="#">Tracking Relationships Between Accounts</a> (on page 146).
Account Team	See <a href="#">Sharing Records (Teams)</a> (on page 68).
Campaigns	<p><b>From contact records only:</b></p> <p>To link a campaign, click Add, select the campaign, and save the record. For field descriptions, see <a href="#">Campaign Fields</a> (on page 113).</p>
Competitors	<p><b>In the standard application, this section appears on the Detail pages for account and opportunity records:</b></p> <p>To link an account and track it as your competitor for this record, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see <a href="#">Tracking Partners and Competitors of Accounts</a> (on page 145).</p>
Contacts	<p><b>In the standard application, this section is available for activity records (tasks and appointments). You might need to add it to your layout:</b></p> <p>To link the Primary Contact, click Edit and link the contact. To link additional contacts to the activity, scroll down to the Contacts section, click Add, and link the contact records.</p> <p><b>In the standard application, this section appears on the Detail pages for account records:</b></p> <p>To link a new contact, click New, enter the required information in the Edit form, and save the record.</p> <p>To link an existing contact, click Add. On the Contact List page, select a contact and click Save. If the contact you want to add does not exist, you can add it by clicking New in the Search for a Contact window. For field descriptions, see <a href="#">Contact Fields</a> (on page 169).</p>

Record Type	Information
	<p><b>In the standard application, this section appears on the Detail pages for opportunity records:</b></p> <p>To link an existing contact to your opportunity record, click Add. In the Contact List form, select a contact, define the contact's Buying Role, and click Save. If the contact you want to add does not exist, you can add it by clicking New in the Search for a Contact window. For field descriptions, see <a href="#">Contact Fields</a> (on page 169).</p> <p>You must select a Buying Role to clarify a contact's responsibilities within a company, and the contact's influence on purchasing decisions. The Buying Role is critical for Key Role Analysis and for understanding the selling political environment.</p> <p><b>NOTE:</b> You can link the same contact to several opportunities or several contacts to the same opportunity.</p>
Contact Relationships	See <a href="#">Tracking Relationships Between Contacts</a> (on page 165).
Contact Team	<p><b>From contact records only:</b></p> <p>To allow this record to be visible to other employees, click Add Users. In the Contact Team Add User window, select the user's name. For more information on sharing records, see <a href="#">Sharing Records (Teams)</a> (on page 68) .</p>
Leads	<p><b>In the standard application, this section appears on the Detail pages for campaign records:</b></p> <p>To link a new lead, click New, enter the required information in the Lead Edit form, and save the record. For field descriptions, see <a href="#">Leads Fields</a> (on page 131).</p>
Notes	<p><b>In the standard application, this section appears on the Detail pages for most records:</b></p> <p>To link a new note, click New, enter the required information in the record Note form, and save the record. For field descriptions, see <a href="#">Adding Notes</a> (on page 71).</p>
Open Activities	<p><b>In the standard application, this section appears on the Detail pages for most records:</b></p> <p>To link a new appointment or task, click New Appt or New Task in the title bar. Then enter the required information in the Edit form and save the record. For field descriptions, see <a href="#">Activity Fields</a> (on page 104).</p> <p>You can link several activities to your selected record. If an activity has a time associated with it, the activity appears in the Activities list and Calendar.</p> <p>Users that can view the selected record can also see the Activities linked to the record, including those activities owned by or assigned to others.</p>

Record Type	Information
Opportunities	<p>To link a new opportunity, click New, enter the required information in the Opportunity Edit form, and save the record. For field descriptions, see <a href="#">Opportunity Fields</a> (on page 188).</p> <p><b>NOTE:</b> To link an opportunity to a lead, convert the lead that is associated with the campaign to an opportunity. For more information, see <a href="#">Converting Leads to Accounts, Contacts, or Opportunities</a> (on page 127).</p>
Partners	<p><b>In the standard application, this section appears on the Detail pages for account and opportunity records:</b></p> <p>To link an account and track it as your partner for this record, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see <a href="#">Tracking Partners and Competitors of Accounts</a> (on page 145) or <a href="#">Tracking Partners and Competitors of Opportunities</a> (on page 178).</p>
Referral	See <a href="#">Adding Referrals</a> (on page 166).
Related Solutions	<p><b>In the standard application, this section appears on the Detail pages for solution records:</b></p> <p>To add a solution, click Add Solution and select an existing solution in the Search window. You can add as many solutions as you like. You may want to link solutions to each other if they share related information or are about a related topic. To create a new solution, click New, fill in the required information, and save the record.</p> <p><b>NOTE:</b> You can review linked service requests from the Solution Detail page, but you must link them from the Service Request Detail page.</p>
Service Requests	<p><b>In the standard application, this section appears on the Detail pages for account and contact records:</b></p> <p>To link a new service request, click New, enter the required information in the Service Request Edit form, and save the record. For field descriptions, see <a href="#">Service Request Fields</a> (on page 211).</p>
Solutions	<p><b>In the standard application, this section appears on the Detail pages for service request records:</b></p> <p>To link a solution, click Add Solution in the Related Solutions title bar. In the Search for a Solution window, you can click the Solution ID link to link an existing solution or click New to create a new solution. For field descriptions, see <a href="#">Solution Fields</a> (on page 223).</p> <p><b>TIP:</b> Before creating new solutions, check the Solution List page to make sure the solution is not waiting for your manager to publish it. The Search for a Solution window shows only solutions marked Published with a status of Approved.</p>

Record Type	Information
Team	<p><b>This is not part of the standard application, but your company administrator can add this to certain record types:</b></p> <p>To allow this record to be visible to other employees, click Add Users. In the Team Add Users window, select the user's name.</p> <p><b>NOTE:</b> If the record owner is part of a Group, (defined by your company administrator), the group members automatically appear in the Team Related Information section.</p> <p>For more information, see <a href="#">Sharing Records (Teams)</a> (on page 68).</p>
User	<p><b>This is not part of the standard application, but your company administrator can add this to certain record types:</b></p> <p>To track another employee involved in an activity, click Add Users. In the Team Add Users window, select the user's name.</p> <p><b>NOTE:</b> Unlike the Team feature, if the record owner is part of a Group (defined by your company administrator), the group members do not automatically appear in the User Related Information section. The User list does not affect visibility to records; it is used strictly for tracking.</p>

## Favorite Records Page

The Favorite Records page shows your favorite records. From this page, you can do tasks shown in the following table:

To do this	Follow these steps
Change the sequence of the records	In the Favorite Records title bar, click the Manage Favorites button. On the Manage Favorites page, change the order of the records until it reflects the sequence that you want. The records then appear in the new sequence on the Action bar and the Favorite Records page.
Delete a record from the list of favorites	In the row for the record that you want to delete, click the Delete link.
Display details of a record	Click the name of the record to display the Detail page for the record.
Page through the list	Click the Previous or Next links.
Show more/fewer records	In the Number of records displayed in the drop-down list at the bottom of the page, select a number of records to see at once.

## Working with Lists

You can limit the records you see by creating filtered lists for many record types. A filtered list shows a subset of the records that meet the criteria making up the list.

Siebel CRM On Demand provides standard filtered lists for many record types, which appear on the record Homepage. Custom lists that you or your managers create are added to that List section.

Selecting a list opens the record List page and displays only those records that meet the criteria. From the List page, you can find a specific record, sort the records, and review the records for specific information. In the record List page you can also filter the list further if there are too many records on the page. For more information about quick ways of filtering your lists, see [Filtering Lists](#) (on page 63).

Each filtered list is specific to the record type, such as Opportunities or Accounts. All employees can create filtered lists for their own use, but you need to be assigned the appropriate role to create public lists that are available to all employees.

**NOTE:** A list that you or your managers create appears in only the language it is created. If you switch languages, it is not added to the lists in the other languages that the application supports. Only the default filtered lists appear in all languages. For example, if an Italian manager creates a new list and some of her team uses the Spanish version of the product, her team members don't see the newly-created list.

## List Management Options

In the List page for most record types, there is a Menu button with some or all of the following options:

- **Batch Delete.** Delete all the records from a list, see [Deleting and Restoring Records](#) (on page 79).
- **Batch Assign Book.** Add records to a book or remove records from a book, see [Assigning Records to Books](#) (on page 630).
- **Export List.** Export a list to save on your computer, see [Exporting Records in Lists](#) (on page 66).
- **Mass Update.** Update a number of records at once, see [Updating Groups of Records](#) (on page 69).
- **Refine List.** Refine a filtered list, see [Creating and Refining Lists](#) (on page 59).
- **Show List Filter.** Show the key information for a list, see [View List Page](#) (on page 65). You can also access this page by clicking View in the Manage Lists page.
- **Manage Lists.** Manage the lists for the record type, see [Manage Lists Page](#) (on page 64).
- **Create New List.** Create a new filtered list, see [Creating and Refining Lists](#) (on page 59).
- **Save List.** Saves a list. When you click Save List, this brings you directly to a page with Save options.



## Accessing the List Management Options

The way in which you navigate to the list management options varies with the record type as shown in the following table:

Record Type	Steps
Main record types (on tabs)	<ol style="list-style-type: none"> <li>1 Click the record tab at the top of the page.</li> <li>2 In the Lists section, click a list.</li> <li>3 Click the Menu button and select the required option.</li> </ol> <p>You can also access the New List page as follows:</p> <ol style="list-style-type: none"> <li>1 Click the record tab at the top of the page.</li> <li>2 In the List title bar, click the New button.</li> </ol> <p><b>NOTE:</b> Communication Lists are lists for specific types of activities. Therefore, use the Activities List page to create additional Communication Lists. Communication lists are available only if your company uses the call center,</p>
Activities	<ol style="list-style-type: none"> <li>1 Click the Calendar tab.</li> <li>2 In the Open Tasks section, click the Show Full List link.</li> <li>3 Click Manage Lists.</li> <li>4 Click the Menu button and select the required option.</li> </ol>
Alerts	<ol style="list-style-type: none"> <li>1 Click the Home tab.</li> <li>2 At the bottom of the Alerts section on My Homepage, click the Show Full List link.</li> <li>3 Click the Menu button and select the required option.</li> </ol>
Attachments	<p>Available only if your role includes the Manage Attachments privilege.</p> <ol style="list-style-type: none"> <li>1 At the top of any page, click the Admin global link.</li> <li>2 Click the Content Management link.</li> <li>3 On the Content Management page, click the Manage Attachments link.</li> <li>4 On the Manage Attachments page, click the Create New List button.</li> </ol>

Record Type	Steps
Users	<p>Available only if your role includes the Administer Users, Groups and Roles privilege.</p> <ol style="list-style-type: none"> <li>1 At the top of any page, click the Admin global link.</li> <li>2 Click the User Management &amp; Access Control link.</li> <li>3 Click the User Management link.</li> <li>4 Click the Menu button and select the required option.</li> </ol>
Product Categories	<p>Available only if your role includes the Manage Content privilege.</p> <ol style="list-style-type: none"> <li>1 At the top of any page, click the Admin global link.</li> <li>2 Click the Content Management link.</li> <li>3 On the Content Management page, click the Product Categories link.</li> <li>4 Click the Menu button and select the required option.</li> </ol>
Products	<p>Available only if your role includes the Manage Content privilege.</p> <ol style="list-style-type: none"> <li>1 At the top of any page, click the Admin global link.</li> <li>2 Click the Content Management link.</li> <li>3 On the Content Management page, click the Products link.</li> <li>4 Click the Menu button and select the required option.</li> </ol>

### Standard Filtered Lists

For a description of the standard filtered lists, click one of the following topics:

- [Activities List Page](#) (on page 102)
- [Campaign Homepage](#) (see "Campaign List Page" on page 113)
- [Leads Homepage](#) (on page 121)
- [Accounts Homepage](#) (on page 135)
- [Contacts Homepage](#) (on page 157)
- [Opportunity Homepage](#) (on page 175)
- [Service Requests Homepage](#) (on page 203)

- [Solution Homepage](#) (on page 218)
- [MedEd Homepage](#) (on page 251)
- [Funds Homepage](#) (on page 259)
- [Household Homepage](#) (on page 273)
- [Portfolio Account Homepage](#) (on page 281)
- [Vehicle Homepage](#) (on page 289)
- [Dealer Homepage](#) (on page 299)

### *To open a list*

- 1 Click the record tab.  
**NOTE:** For lists of activities, click the [Calendar](#) tab and then the [Show Full List](#) link in the [Open Tasks](#) section.
- 2 From the Lists section on the record Homepage, select the list you want to work with.

## Changing the Sequence of Lists Appearing on a Homepage

You can use the following procedure, or from a Lists page, click Menu and select Manage Lists to access the List Order button.

### *To change the sequence of lists appearing on a Homepage*

- 1 Click the record tab.
- 2 At the bottom of the record Lists section, click the Manage Lists link.
- 3 Click the List Order button.
- 4 Change the sequence in the Lists to Appear on Homepage list.
- 5 Click Save.

On the record Homepage, the lists appear in the sequence you set up. (Only the first 10 lists appear on the Homepage.)

## Creating and Refining Lists

After you access the Create List page or Refine List page for the list that you are creating or refining, you enter the criteria for filtering the records.

**Before you begin.** When you create a list, you need to enter the fields and values for the criteria that you set up. You might want to go to the record Edit page, and write down the

exact field names and values as they are used in your application. Otherwise, your filtered list might not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names. However, the printout does not capture the field values for drop-down lists.

### *To set up a list*

- 1 In the Search In section, select one of the following from the drop-down list:
  - **All records I can see.** Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role, and the access level for shared records.
  - **All records I own.** Includes only records in the filtered list that:
    - You own
    - Are shared with you by the owner through the Team feature
    - Are shared with you through the group assignment feature (for tasks, accounts, contacts, and opportunities)
  - **All records where I am on the team.**
  - **All records I or my subordinates own.**
  - **All records where I or my subordinates are on the team**
  - **My Default Look In.** Your default setting for the Look in selector, as defined by your company administrator.
- 2 If the Book feature is enabled for your company, select a book, user, or delegate from the Look in selector, if required.

For more information, see [Using the Look In Selector](#) (on page 47).

**NOTE:** The Search In section is not displayed for record types that do not have owners (for example, Products, Users).
- 3 In the Choose Case Sensitivity section, select the Case Insensitive check box, if required.

If this check box is selected, columns that are queried irrespective of case are shown in blue. Case insensitivity can affect performance; use the option that works best for you.
- 4 In the Enter Search Criteria section do the following:
  - a Select a field from the Field drop-down list.

The fields are pre-populated with the targeted search fields for the record type, see [Default Search Fields](#) (on page 40).

If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table or in [About Countries and Address Mapping](#) (on page 731).

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

- b** Enter the conditions, filter values, and operators (AND, OR) that define the filter.

If you are refining a list, the fields are already populated with criteria that you can refine further.

For information about using filter conditions, see [About Filter Conditions](#) (on page 42).

**TIP:** To create a list of service requests that do not have an owner, select the Owner ID field, the Equal to filter condition, and leave the value blank. You can create other null lists using this general approach.

**CAUTION:** When entering Filter Values, check to make sure that you are following the rules described in [About Filter Values](#) (on page 46). Otherwise, the correct records might not be included in the list.

**Examples**

**Accounts:** If you want to create a filtered list of accounts in Canada with annual revenue over \$100,000,000.00, complete the form as follows:

Field	Condition	Value(s)	
Annual Revenue	Greater than	100000000	AND
Country	Equal to	Canada	

**Leads:** If you want to create a filtered list of leads with potential revenue over \$100,000.00 and ratings of A or B, complete the form as follows:

Field	Condition	Value(s)	
Potential Revenue	Greater than	100000	AND
Rating	Less than	C	

**5** For the Display Columns and Sorting Order section:

- a** Choose the fields to display as columns in the search results by moving fields from the Available Fields list to the Selected Fields list. Use the up and down arrows to change the order of the selected fields.
- b** In the Sort by drop-down list select a default sort field, and click Ascending or Descending to select a sort order.

**NOTE:** You cannot select a field that is a check box as the sort field in this step. However, after the list is created, you can click the column header to sort the fields based on the values in the check box.

**6** (Optional) To see the results of your search criteria without saving the list, click Run.

The List page appears displaying the results of your search criteria. You can then click the Menu button in the title bar, and select Save List or Refine List to save your list.

**7** Click Save, and complete the fields in the Save options section:

Field	Comment
List Name	Type a name for the list (50-character limit). You can use any symbols or punctuation marks except quotation marks (") in your List Name.  Created lists are arranged alphabetically. Therefore, consider putting the most pertinent word at the beginning of the name.
Description	Enter a description of up to 251 characters.

Field	Comment
List Accessibility	<p>If your user role includes the Define Public Lists privilege, select one of these options:</p> <ul style="list-style-type: none"> <li>■ <b>Private.</b> Allows you alone to see the filtered list.</li> <li>■ <b>Public.</b> Makes the list available to all employees. Public lists appear on the record Homepage for all employees at your company.</li> <li>■ <b>Role Specific.</b> Make the list available only to users with a specific role.</li> </ul>

#### 8 Click Save and Run.

The filtered list you created appears in the drop-down list in this page's title bar and in the Lists section of the record Homepage.

## Filtering Lists

In a List page you can quickly filter the records in the list in two ways:

- Using the Alpha Search controls to filter on a particular column
- Using a Quick Filter search

By default, list pages show the Alpha Search controls, but you can click the filter toggle icon to show the Quick Filter controls. To switch back to the Alpha Search controls, you can click the ABC icon. The search controls that are displayed persist across different sessions.

For more advanced filtering, you can also filter the list by clicking the Menu button in the title bar, and clicking Refine List.

You can also restrict the records that are searched by selecting a book or user from the Look in selector. For more information, see [Using the Look In Selector](#) (on page 47).

## Alpha Search

With Alpha Search you can:

- Click on a letter in the Alpha bar to show only records that begin with that letter.
- Enter characters in the text field and click Go to find records beginning with those characters. You can use wildcards, see [About Filter Values](#) (on page 46).
- Click a column header to sort records based on that column. An arrow next to the column header indicates which column the sort is based on, and whether it is sorted in ascending or descending order. By default, records are searched using the left-most column as the search key.

Alpha Search is case insensitive and does not affect the Refine list search criteria.

Occasionally, the Alpha bar is not active—its characters are not hyperlinks—because the default sort order is on a column that the Alpha bar does not work with. For example, the

default sort order for the Deleted Items page is on the Type column, which is not sortable. Therefore, the Alpha bar is not active. However, if you click the Name column header, the data is sorted, and then the Alpha bar is activated.

### Quick Filter Search

With Quick Filter search you can filter the list to show records where a selected field meets particular filter criteria.

You select values from left-to-right in three drop-down lists to specify respectively the search field, filter condition, and filter value. The values available in the filter condition drop-down vary according to what you select in the search field. For information about the filter conditions available, see [About Filter Conditions](#) (on page 42).

The fields that are available in the search fields drop-down list are those that are optimized for fast lookup, plus any additional fields that your administrator has specified.

The filter value field changes to match the field type. For example, a calendar icon is displayed when you want to select a date, and a telephone icon is displayed when you want to specify a telephone number. The filter value field is hidden when no value is required with the filter condition. For text and telephone fields, you can use wildcards, see [About Filter Values](#) (on page 46).

Quick Filter Search is case insensitive and does not affect the Refine list search criteria.

#### *To perform a Quick Filter Search*

- 1 Select a field in the drop-down list to the right of the label Show Results Where.
- 2 Select a condition from the filter condition drop-down list.
- 3 If required, enter a value in the filter value drop-down list.
- 4 Click Go.

### Manage Lists Page

The Manage Lists page shows the filtered lists for a specific record type:—those lists that you created, the lists your managers created for you to use, as well as lists provided by the system. From this page, you can do the tasks shown in the following table:

To do this	Follow these steps
Add a list to Favorite Lists	In the row for the list, click the Favorites icon.



To do this	Follow these steps
Change the sequence of the first 10 lists on the record Homepage and drop-down list	<p>In the Manage Lists title bar, click the List Order button. On the List Display Order page, change the order of the 10 lists until they reflect the sequence you want. The lists appear in the new sequence on your record Homepage and the drop-down list on List pages.</p> <p><b>NOTE:</b> Lists that remain in the Available list do not appear as options in drop-down lists or on Homepages.</p>
Create a filtered list	In the Manage Lists title bar, click the New List button. On the New List page, enter the required information, and save the record.
Delete a list	<p>In the row for the list you want to delete, click the Delete link.</p> <p>You can delete only lists that you created.</p>
Page through the list	Click the Previous or Next links.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a list	<p>In the row for the list you want to update, click the Edit link. This opens the Refine List page, where you can update the list.</p> <p><b>NOTE:</b> You cannot change the standard filtered lists distributed with the application, or the filtered lists saved before the updating capability became available.</p>
View the key information and filter information for a list	In the row for the list, click the View link. This opens the View List page.

## View List Page

The View page displays the following information:

- **Key list information.** The name and description of the list and also:
  - **List accessibility.** The visibility of the list indicating whether it is private, public, or specific to a user role.
  - **Search In.** The subset of records that are searched to filter the list.
- **Filter information.** The fields, filter conditions, and filter values used to produce the filtered list.
- **Selected Fields.** The fields selected to display as columns in the search results, and the sort order of the field selected as the default search field.

### Favorite Lists Page

The Favorite Lists page shows your favorite lists. From this page, you can do tasks shown in the following table:

To do this	Follow these steps
Change the sequence of the lists	In the Favorite Lists title bar, click the Manage Favorites button. On the Manage Favorites page, change the order of the lists until it reflects the sequence that you want. The lists appear in the new sequence on the Action bar and the Favorite Lists page.
Delete a list from the list of favorites	In the row for the list you want to delete, click the Delete link.
Display a list	Click the name of the list to display the List page from which you can work with the list.
Page through the list	Click the Previous or Next links.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.

You can embed Favorite Lists as a Web widget in other applications. For more information, see [Embedding a Favorite Lists Widget](#) (on page 320).

### Exporting Records in Lists

You can export the records that meet the criteria you set up in a list. After the system exports the file, you can save it by downloading the file.

**NOTE:** The system retains your export results for 72 hours. After that, you need to export the list again.

**Before you begin.** To perform this procedure, your user role must include the List Export privilege.

#### *To export records in a list*

- 1 From the record Homepage, select the list you want to export.
- 2 On the record List page, click the Menu button in the title bar, and select Export List.
- 3 On the Export List page, fill out the information.
- 4 Click Export.
  - For a Queued Export (larger export), the Personal Export Request Queue appears. To review the export status later:
    - a In the row of global links at the top of every page, click My Setup.

- b** Click the Data and Integration Tools link.
  - c** Click the Export Request Queue link.
  - For an Immediate Export, the results appear in the List Export Request Detail page in a zip file.
- 5** From the List Export Request Detail page, you can download the file or delete it.

### *To view your export results or queue*

- 1** In the upper-right corner of any page, click the My Setup global link.
- 2** Click the Data & Integration Tools link.
- 3** Click the Export Request Queue link.

The Export Request Queue page appears, showing the time the export was completed or estimated completion time.
- 4** In the Completed Requests section, click the Export Type or Record Type link to open the Export Request Details page.
- 5** Then you can:
  - Click Download to open or save the zip file. The zip file consists of an export summary text file and CSV file for each type of record you exported.
  - Click Delete to delete the file.

## Transferring Ownership of Records

You own a record when your name is in the Owner field. Typically, you can view and edit all records that you own. You become an owner when:

- You create the record
- The record is assigned to you
- You are in a group that owns the record (with group ownership, your name might not appear in the Owner field)

You can transfer the ownership of most records if:

- You own the record
- One of your direct reports owns it
- Your privilege and access level permit it

**NOTE:** For account, contact, and opportunity records only, you can also transfer the ownership if the record owner has granted you full-access rights to that record.

### *To transfer ownership of a record*

- 1 Select the record.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2 On the Detail page, click Edit.  
**NOTE:** If the inline edit feature is enabled for your company, you do not need to click Edit to go to the Edit page.
- 3 Click the Lookup icon next to the Owner field.
- 4 In the Search window, click the Last Name link of another employee.
- 5 Save the record.

## Sharing Records (Teams)

For some record types, such as accounts, contacts and opportunities, you can share a record so that others can view it. With account records, you can also share the contact and opportunity records that are linked to that account record.

To share a record, you first add the person to the Team for the selected record. Then you specify the access level the person has to the record.

### *To share a record*

- 1 Select the record.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2 On the record Detail page, scroll down to the Team section and click Add Users.
- 3 In the Team Add User window, click the Lookup icon next to User.
- 4 In the Search for a User window, select an employee.
- 5 Set roles and access levels:  
**NOTE:** Depending on the record type and setup, your application might differ from these options.
  - a (Optional) To explain the role the linked record plays in relation to the main record, select an option from the Team Role drop-down list.

- b** To set the access rights for the record type, select an option from the Access drop-down list.
  - **Read-only.** Users can view records but not change them.
  - **Edit.** Users can update records.
  - **Full.** Users can update or delete records.

**NOTE:** Your managers have owner access to records of their subordinates (as long as Manager Visibility is turned on for the company) regardless of your selections here. For any user, the most liberal access set at any point in the application is the one that determines the access level for that user.

- 6** Click Save.

## Related Information

See the following topic for related information about opportunity teams:

[About Opportunity Teams](#) (on page 185)

## Updating Groups of Records

You can update the values in fields for a list of records: accounts, contacts, opportunities, leads, service requests, or activities (tasks, appointments). This allows you to update a value for an entire group of records at once, such as changing the owner to a different employee.

**NOTE:** You can update up to 50 records at a time. If your list contains more than the limit, repeat the updating procedure on the remaining records.

**Before you begin.** To perform this procedure, your user role must include the Mass Update privilege. Also, create a list to capture the records you want to update, if necessary.

### *To update a group of records*

- 1** From the record Homepage, click the list of records you want to update.
- 2** On the record List page, click the Menu button and select Mass Update.
- 3** In Step 1, clear the check box for records you don't want to update.
- 4** In Step 2, select the fields and enter new values for those fields.

You can select up to five fields to update to new values. To remove existing values from a field, leave the Value column blank in Step 2.

- 5** Click Finish.

## Merging Records

If you have a duplicate record, you can merge the two records into one for accounts, contacts, leads, service requests, or portfolio accounts.

When you merge a record, you specify the field values from the two records that you want to keep in the record that you retain, which is called the *primary record*. The record that is deleted is called the *duplicate record*.

The following considerations apply to the merging of records:

- Fields with the same values cannot be changed.
- Fields that are updated by the system default to the value from the primary record and cannot be changed.
- Account and contact teams are not merged. The team from the primary record is retained.
- Any records that are linked to the duplicate record are linked to the primary record.
- There is no duplicate checking for related records. To remove duplicate related records you must delete them.
- When you merge accounts, the owner of the duplicate account records is added to the account team and given full access to the primary record.

### Before you begin:

- To perform this procedure, your user role must include the Merge Records privilege.
- Your access level must be Edit for the primary record, and Delete for the duplicate record.
- Note the record names so that you can select them during the merge.

### To merge two records

- 1 Select the record you want to retain as the primary record.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2 On the record Detail page, click the Merge button.
- 3 In Step 1, click the Lookup icon, and select the Duplicate record.
- 4 In Step 2, review the values for each record, and select the values to save with the record.  
The Value to Save column displays the values from the primary record by default.
- 5 Click Finish.

## Adding Notes

You can add notes to most records. You can add a note in two ways:

- By clicking the note icon at the top-right of the page. This is available if the Message Center is enabled for your company. With this method you can add notes to a list of notes for the record, and subscribe to notes that are added to the record. A copy of these notes is also added to your Message Center.
- By clicking New in the Notes section.

Typically, if your company administrator has made the note icon available, the Notes section will not be available. However, if the Notes section is present, notes that you add to the list of notes are also added to the Notes section.

For more information about the Message Center, see [Working with the Message Center](#) (on page 29). For more information about using the list of notes, see [Working with the List of Notes](#) (on page 72).

The method used to create a note makes no difference to the access permissions to the note.

### *To add a note using the note icon*

- 1 Select the record.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2 On the Detail page, click the note icon.
- 3 Click New Note.
- 4 On the top line of the note, fill in the Subject.
- 5 To prevent others from viewing the note, select Private.  
If you do not select Private, others with access to this record can view the note.
- 6 Click Save.

### *To add a note in the Notes section*

- 1 Select the record.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2 On the Detail page, scroll down to the Notes section and click New in the Notes title bar.
- 3 On the Note Edit page, fill in the Subject.
- 4 To prevent others from viewing the note, select Private.  
If you do not select Private, others with access to this record can view the note.
- 5 Save the record.

### Note Edit Page

The Note Edit page lets you add a note to a record or update information in an existing note. It shows the complete set of fields for a note record.

Field	Description
Private	Indication to exclude this note from others' access. If you do not select Private, anyone with access to this record can view the note.
Description	Limit of 16,350 characters. <b>NOTE:</b> Different restrictions apply when you import notes into Siebel CRM On Demand (see <a href="#">Note Fields: Import Preparation</a> (on page 718)).

### Note Page (List)

The Note page shows all notes linked to a record. The following table describes what you can do from the Note page:

To do this	Follow these steps
Create a note	In the Notes title bar, click the Note button. On the Note Edit page, complete the required information and save the record.
Delete a note	Click the Del link in the row of the record you want to delete. You can restore deleted items up to 30 days after deletion.
Find a note	Click the Subject column header to sort the data. Then click a letter in the Alpha bar. For notes beginning with numbers, click 0-9.
Page through the list	Click the Previous or Next links.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a note	Click the Edit link in the row of the record you want to update. On the Note Edit page, update the information and save the record. You can also edit the fields that are displayed on the Notes page inline.
View note details	Click the Edit link in the row of the record you want to update. On the Note Edit page, review the note details.

### Working with the List of Notes

If this feature is enabled for your company, the record Detail pages contain a note icon at the top right of the page. The number next to the note icon indicates the number of notes attached to the record.

When you click the note icon, a list of notes is displayed. For each note, the name of the user who created the note is displayed, together with the subject of the note or first part of the



note text, if there is no subject. The date of the note is displayed, or if the note is from today, the time.

From the list of notes you can do the following:

To do this	Follow these steps
View a note	Scroll down to the required note.
Create a new note	Click New Note. Type a subject on the first line, type the note, and click Save. The note is sent to the Message Center of all users who have subscribed to the record. From the Message Center, users can click a link on the note to navigate to the record.
Subscribe to notes on the record	Scroll down to the required note, and click Subscribe. For more information, see <a href="#">Subscribing to Notes</a> (on page 73).
Delete a note	Scroll down to the required note, and click Delete. This action deletes the note from the Message Center and the record Detail pages.
View details of the user who sent a note	Scroll down to the required note, and click the user name. The User Details page for the user is displayed.

## Subscribing to Notes

You can subscribe to notes that are added to a record so that when someone adds a note to the record, the note is sent to your Message Center. You can subscribe to notes on any records to which you have access.

From the Message Center you can click on a link in a note on a record to navigate to the record.

For more information about the Message Center, see [Working with the Message Center](#) (on page 29).

### *To subscribe to notes on a record*

- 1 Select the record.

For more information on selecting records, see [Finding Records](#) (on page 35).

- 2 On the Detail page, click the note icon.

- 3 Click the Subscribe button.

The button label changes to Subscribed. You can cancel the subscription by clicking the button again.

## Sending Notes to Other Users

You can send a note to other users by clicking a note icon that is displayed next to a user's name in the application. The note is sent to the Message Center of the user.

You can use this facility with the fields associated with a user name, such as First Name, Owner, Created By, and Modified By. These fields appear in Detail pages, lists, and other places in the application.

From the Message Center you can reply to notes from other users.

You can add user records to the favorite Records section in the Action bar. This allows quick access to the users that you often send messages to.

For more information about using the Message Center, see [Working with the Message Center](#) (on page 29).

### *To send a note to another user*

- 1 Move the pointer over the field associated with the user name so that the note icon appears.
- 2 Click the note icon
- 3 Type the note, and click Save.

## Attaching Files and URLs to Records

You can attach files and URLs to most records. After that, you can:

- View the attachment
- Select a different attachment
- For a file attachment, update the file content and replace the previous attachment with the revised one

**Before you begin.** Make sure your file does not exceed 4 MB or, to conserve space, consider placing the file on a public server and indicating the path and file name for it instead of attaching the file to the record. Also, for your data protection and security, the application does not allow you to attach certain file types, such as .exe or .zip files. If you try to attach a file with an unsupported file type, you receive an error message.

***To attach a file or URL to a record***

- 1** Select the record that you want to attach the file or URL to.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2** On the Detail page, scroll down to the Attachments section and click Add Attachments or Add URL in the title bar.  
**NOTE:** If you want to send users to a public server to access the file, follow the procedure for adding a URL attachment, not a file attachment.
- 3** On the Attachment Edit page, do the following:
  - For a file attachment, click the Browse button next to the File field and select the file. Fill in the Attachment Name field with a display name that identifies the file attachment.
  - For a URL attachment, fill in the URL field with the URL address (for example: [www.crmondemand.com](http://www.crmondemand.com)) and the Attachment Name field with a display name that identifies the URL.**NOTE:** If you have placed a file attachment on a public server, fill in the URL field with the path and filename (for example: `\\scdept\attachments\products.xls`).
- 4** On the Attachment Edit page, click Save.

***To view an attachment***

- 1** Select the record that the file or URL is attached to.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2** On the Detail page, scroll down to the Attachments section and click View in the appropriate row.

***To select a different attachment***

- 1** Select the record that the file or URL is attached to.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2** On the Detail page, scroll down to the Attachments section and click the Attachment Name link for the attachment you want to replace.

- 3 On the Attachment Edit page, do the following:
  - For a file attachment, click the Browse button and select the new file. Update the Attachment Name field, if necessary.
  - For a URL attachment, fill in the URL field with the new URL address and update the Attachment Name field, if necessary.
- 4 On the Attachment Edit page, click Save.

**TIP:** To verify that you have entered the correct attachment information, click the Back link until you return to the original record Detail page. In the Attachments section, review the new attachment record.

### *To update a file attachment*

- 1 From its original location—not from within Siebel CRM On Demand—open the attachment.
- 2 Edit the file and save it locally, such as to your hard drive.
- 3 Sign in to Siebel CRM On Demand.
- 4 Select the record that you want to attach the updated file to.

For instructions on selecting records, see [Finding Records](#) (on page 35).
- 5 On the Detail page, scroll down to the Attachments section and click Replace in the row of the file attachment.
- 6 In the Replace Attachment window, select the updated file and click Save.

## Attachment Fields

The following table describes field information for a file or URL that you attach to a record in the application. Some fields appear on the Detail pages for the record type you are attaching the file to; other fields appear on the Attachment Edit page.

Review the information in this table to make sure your file meets the file size and file type requirements:

Field	Description
Attachment Name	Name you want to use to identify the file or URL.
Created By	Alias of the person who first attaches the file to the record. System-generated.
File	For a file attachment, the path and filename of the attached file.
Modified By	Name of the person who creates or updates the record followed by the date and time it is created or updated. System-generated.

Field	Description
Size (in Bytes)	For a file attachment, the file size. The limit is 4 MB for each file. The URL link shows a nominal file size of 2 KB.
Type	For a file attachment, the file type, such as .doc for a Microsoft® Word document. For your data protection and security, the application does not allow you to attach certain file types, such as .exe or .zip files. If you try to attach a file with an unsupported file type, you receive an error message.  For a URL attachment, it displays URL.
URL	Complete URL address.

## Attachment List Page

The Attachment List page shows all files and URLs linked to that record. The following table describes what you can do from the Attachment List page:

To do this	Follow these steps
Attach a file to the record	In the Attachments title bar, click the Add Attachment button. On the Attachment Edit page, complete the required information and save the record.
Attach a URL to the record	In the Attachments title bar, click the Add URL button. On the Attachment Edit page, complete the required information and save the record.
Delete an attachment	Click the Del link in the row of the record you want to delete. You can restore deleted items up to 30 days after deletion.
Find an attachment	Click the Attachment Name column header to sort the data. Then click a letter in the alphabet bar. For attachment names beginning with numbers, click 0-9.
Page through the list	Click the Previous or Next links.
Select a different attachment to replace the current one	Click the Replace link in the row of the record you want to change. On the Attachment Edit page, select another file and save the record.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Sort the list of attachments	Click the underlined column header you want to sort on. If the column header is not underlined, you cannot sort on that field.
View the attachment	Click the View link in the row of the record you want to view. This opens the file or takes you to the URL.

## Using Assessment Scripts

**NOTE:** This feature is not part of the standard application, so it might not be available in your version of the application.

If your managers set up the assessment scripts, you can access the scripts to collect information from your customer. The information can then be used in reports or analyses, if your company administrator has set that up.

The application allows you to access scripts from these record types:

- Lead (Lead Qualification scripts)
- Contact (Satisfaction surveys)
- Service Request (Call Scripting and Satisfaction surveys)
- Opportunity (Opportunity Assessments)

An assessment script must be active and have at least one criterion set by your company administrator before it is displayed on the record detail page (answers can be added later).

For the Contact, Lead, Opportunity and Service Request record, your company administrator can set up four picklist fields. For example these fields might be named Assessment Filter 1 through Assessment Filter 4. These fields only appear on the record form if the company administrator has added them to a page layout for your user role. The values that you define in these picklists are used to prepopulate four corresponding drop-down lists in the Search for a Script window. The values selected for each picklist in the parent form are used to preselect the value in the drop-down lists in the Search for a Script window.

After a script is added to the Detail page, data subsequently changed in the template script by the company administrator are not reflected in the script created in the detail page. The only exception is the data from the answer section. Data in the answer section can be changed by the company administrator at any time and is reflected on the Detail page when you work through the assessment question.

### *To use an assessment script*

- 1 Select the record.

For instructions on selecting records, see [Finding Records](#) (on page 35).

- 2 On the record Detail page, scroll down to the script section and click Add.

- 3 If necessary, select the script from the Search for a Script window.

If only one script meets the criteria defined by your company administrator, the script opens automatically. Otherwise, you need to select the appropriate script in the Search window.

**TIP:** To find the appropriate script, select an option from the drop-down list, and click Go.

- 4 On the script page, ask your customer the questions and fill in the information.

- 5 Click Save.

Depending on how your company administrator set up this script, these events might occur:

- A score is calculated and compared to a threshold.
- Depending on whether the score is above or below the threshold, an outcome is calculated.
- The score, answers to the questions, and the outcome are mapped back to the parent record.
- The last assessment date is also populated.

## Deleting and Restoring Records

You can delete a record if your access level to that record allows it. You can delete a list of records if your role includes the Batch Delete privilege.

When you delete a record or a list of records, the records are stored for 30 days in the Deleted Items area. During that time, you can restore the records. However, after 30 days, the deleted items are permanently purged and cannot be retrieved.

**NOTE:** Alert records and their attachments are the exception to the normal deletion behavior. Instead of being stored for 30 days, they are immediately purged from the system and cannot be restored.

Deleting a record automatically deletes some records linked to the record you are deleting. For example, if you delete an account, any linked notes are also deleted.

When you click the Deleted Items global link, the All Deleted Items page appears with all the items you have deleted. If your user role includes the Recover All Records privilege, you will see all deleted items for your company.

The parent record appears in the deleted items list, but the linked records do not. The only time a linked record appears as a separate record is when you delete the linked record *before* deleting the parent record.

For example, if you delete an account with three activities linked to it, only the account record appears in the list of deleted items. However, if you had deleted one of those linked activities before deleting the account itself, that activity would appear in the list as a separate record.

When restoring a record, all records linked to that record at the time it was deleted are also restored with their relationships intact. Always restore the parent record first; if you try to restore a child record first, the system displays an error message.

**NOTE:** Companies are limited to the amount of data they can store. Records stored in Deleted Items do not count towards a company's total disk storage limit.

### *To delete a record*

- Click Del in the row for the record.

### *To delete a list of records*

**Before you begin.** To perform this procedure, your user role must include the Batch Delete privilege.

- 1 From the record Homepage, click the list of records you want to delete.

**TIP:** Export the list before you delete it. This allows you to import the data back into CRM On Demand if you delete some records in error.

You can delete lists of accounts, contacts, opportunities, leads, service requests, or activities.

- 2 On the record Lists page, click the Menu button and select Batch Delete.

- 3 Click OK to confirm that you want to proceed.

- 4 On the Batch Delete Queue page, click Proceed in the Active Requests section.

**NOTE:** If you do not click Proceed, the deletion does not occur. You can return to the Batch Delete Queue by clicking the Admin global link and then the Batch Delete Queue link on the Admin Homepage.

- 5 To review the log file for the deletion, click Log in the Processed Requests section.

### *To restore a record*

- 1 Click the Deleted Items global link.

- 2 Click Restore in the row for the record.

**NOTE:** If your role includes the Recover All Records privilege, you can restore records that anyone at your company deleted.

The following table provides further information about deleting records.



If you delete this	You should be aware of this
Account	<p>You cannot delete an account if it is linked to an Opportunity with a Sales Stage of Closed-Won.</p> <p>When deleting an account, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Leads</li> <li>■ Opportunities</li> <li>■ Activities (along with any attachments linked to this activity)</li> <li>■ Notes</li> <li>■ Attachments</li> </ul> <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> <li>■ Contacts</li> </ul>
Activity	<p>When deleting an activity, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Attachments</li> </ul>
Alert	<p>Alert records and their attachments are the exception to the normal deletion behavior. Instead of being stored for 30 days, they are immediately purged from the system and cannot be restored.</p>
Campaign	<p>When deleting a campaign, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Leads</li> <li>■ Activities (along with any attachments linked to this activity)</li> <li>■ Notes</li> </ul> <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> <li>■ Opportunities</li> </ul>
Contact	<p>When deleting a contact, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Leads</li> <li>■ Activities (along with any attachments linked to this activity)</li> <li>■ Notes</li> <li>■ Attachments</li> </ul> <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> <li>■ Accounts</li> <li>■ Opportunities</li> </ul>

If you delete this	You should be aware of this
Dealer	<p>When deleting a dealer, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Activities (along with any attachments linked to this activity)</li> <li>■ Notes</li> <li>■ Attachments</li> </ul>
Filtered List	<p>Filtered lists cannot be edited. To change a filtered list, delete it and create a new one.</p>
Fund	<p>When deleting a fund, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Activities (along with any attachments linked to this activity)</li> <li>■ Notes</li> <li>■ Attachments</li> </ul>
Group	<p>When you delete a group, the system removes the reference to the group from the group's records, and the record ownership reverts to the employee in the Owner field. If that process involves a large number of records, it might take some time to complete. During that time, the system does not allow group members to create records.</p>
Household	<p>No child records are deleted when the household is deleted.</p>
Lead	<p>When deleting a lead, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Activities (along with any attachments linked to this activity)</li> <li>■ Notes</li> <li>■ Attachments</li> </ul> <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> <li>■ Opportunities</li> </ul>
Medical Event	<p>When deleting a medical event, these linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> <li>■ Invitees (contacts)</li> </ul> <p><b>NOTE:</b> You cannot delete an event that has a Status of Completed.</p>

If you delete this	You should be aware of this
Opportunity	<p>You cannot delete an opportunity that has a Sales Stage of Closed because that information is used for historical reporting. When deleting an opportunity, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Leads</li> <li>■ Activities (along with any attachments linked to this activity)</li> <li>■ Notes</li> <li>■ Attachments</li> </ul> <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> <li>■ Contacts</li> <li>■ Accounts</li> </ul>
Portfolio Account	<p>When deleting a portfolio, these linked records are also deleted:</p> <ul style="list-style-type: none"> <li>■ Activities (along with any attachments linked to this activity)</li> <li>■ Attachments</li> </ul> <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"> <li>■ Contacts</li> </ul>
Product	<p>You cannot delete a product. To remove it from the list of available products your employees can link to opportunities (as products) or accounts (as assets), clear the Orderable check box on the Product Edit page.</p>
Product Category	<p>A user whose role includes the Manage Content privilege can delete product categories. When a category is deleted, the association between the product and the category is broken, but the products are retained.</p>
Role	<p>A user whose role includes the Administer Users, Groups and Roles privilege can delete roles.</p> <p>Instead of being stored for 30 days, deleted roles are immediately purged from the system and cannot be restored.</p> <p>Before deleting a role, all users assigned to that role must be assigned to a different role. Otherwise, the application does not let you delete the role.</p>

If you delete this	You should be aware of this
Solution	<p>When deleting a solution, these linked records are also deleted:</p> <ul style="list-style-type: none"><li>■ Solution Histories</li></ul> <p>These linked records are <i>not</i> deleted:</p> <ul style="list-style-type: none"><li>■ Service Requests</li><li>■ Solutions</li></ul> <p><b>TIP:</b> If you believe a solution is no longer useful, but it was at one time linked to a service request, change the status to Obsolete instead of deleting it. That way, your company can prevent the solution from further use by your customer service representatives, but it is saved for historical purposes. (To determine if the solution has been used, go to the Solution Detail page, and check the Service Requests section for linked records.)</p>
Territory	<p>A user whose role includes the Administer Territories privilege can delete territories. Territories can be deleted whether or not they are associated with other territories, accounts, opportunities, and so on.</p> <p>The Territory Detail page shows the company administrator if the territory has any children or not. The company administrator can query on account, opportunity, and so on using the condition where Territory = &lt;Territory to be deleted&gt; to find out if the territory has any associated account, opportunity, and so on.</p>
Vehicle	<p>When deleting a vehicle, these linked records are also deleted:</p> <ul style="list-style-type: none"><li>■ Activities (along with any attachments linked to this activity)</li><li>■ Notes</li><li>■ Attachments</li></ul>

**NOTE:** For further information on linked records, see [Converting Leads to Accounts, Contacts, or Opportunities](#) (on page 127).

## About Duplicates When Creating Records

When you create a record, the application warns you if that record already exists. The existing record can reside in your current company records. If you receive the duplicate error message, cancel creating the record, find the existing record, and update it.

For information on what constitutes record duplication, see the table in [About Record Duplicates and External IDs](#) (on page 755). The same criteria are used to determine record duplicates when creating records as when importing records.

## Printing Information That Appears on Pages

From all pages except the Edit pages, you can print the information that shows on that page. All extraneous interface elements and links are excluded when you print a page.

### *To print the information appearing on your page*

- 1 Click the Printer Friendly link.
- 2 In the window, click the Print link.
- 3 In the Print window, click Preferences.
- 4 Click the Layout tab and select Landscape.  
Using Landscape mode optimizes the appearance of the data on the printed page.
- 5 Follow the onscreen instructions to print the report.

## Exiting Siebel CRM On Demand

**CAUTION:** Before exiting the application, explicitly save all information, and close all open Siebel CRM On Demand windows, such as forms for creating new records. If you are using Call Center On Demand, the call center application, change your work status to Unavailable before signing out.

### *To exit Siebel CRM On Demand*

- In the top right corner of your Siebel CRM On Demand page, click the Sign Out link.

If you close the browser window to exit Siebel CRM On Demand, your session remains open until it times out, usually configured for 10-15 minutes.

**NOTE:** To sign in as a different user, click the Sign Out link in the top right corner. If you don't explicitly sign out, the browser instance is not closed, and all views and data assume the first user is still signed in.

## Contacting Oracle

Oracle offers a variety of services and welcomes your suggestions about this application. Use the following resources to:

- Suggest improvements to the product, our services, or our processes at <https://ebusiness.siebel.com/OnDemandCustomerCare/>
- Request sales collateral or information about our new products and promotions at <http://www.crmondemand.com/>
- Suggest improvements to online help by sending email to [siebeldoc\\_ww@oracle.com](mailto:siebeldoc_ww@oracle.com)

## 2 Calendar and Activities

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Use the Calendar pages to review, create, and update your activities. An *activity* consists of tasks you need to accomplish before a certain date and appointments you want to schedule for a specific time.

Tasks and appointments can be meetings, calls, demonstrations, or events. The difference between tasks and appointments is that tasks appear in a task list and have a due date and status, whereas appointments are scheduled on your calendar with a specific date and time.

### Calendar Pages

The Calendar pages provide the main area for managing activities. The default page is the Daily Calendar page, which contains a Daily Calendar section, a Calendar View section, and an Open Tasks section.

**NOTE:** If your role includes the Share Calendar privilege, your Calendar pages might provide additional functionality than that listed on the default page. For more information on additional functionality, see [Calendar Setup Page](#) (on page 100).

The following table describes what you can do from the Daily or Weekly Calendar.

**NOTE:** Communication activities generated from Call Center On Demand belong to a specific activity subtype. Therefore, they do not appear on the Calendar pages or Activity lists.

To do this	Follow these steps
Create a task	Click New in the Open Tasks title bar. On the Task Edit page, enter the required information and save the record.
Create an appointment	Click New Appointment in the Calendar title bar. On the Appointment Edit page, enter the required information and save the record.
Delete an appointment	Click the link for the appointment that you want to delete. On the Appointment Detail page, click Delete.
Go to a specific day	Click the day link in the Calendar View section.
Go to a specific month	Click the arrows in the Calendar View section.

To do this	Follow these steps
Mark a task as completed	In the Open Tasks section, click the Show Full List link. On the Activities List page, select the activity whose status you want to change. On the Task Detail page, click the Mark as Completed button.
Page through the Calendar day by day	Click the arrows in the Daily Calendar section.
Update an activity	Click the link for the activity (appointment or task) that you want to update. On the Appointment or Task Detail page, edit the fields inline or click Edit to open the Appointment or Task Edit page. For more information on updating records, see <a href="#">Updating Record Details</a> (on page 48).
View a list of tasks (open, closed, or all), appointments, or activities	In the Open Tasks section, click the Show Full List link. On the Activities List page, click the drop-down list and change the selection.
View the day's appointments	Click the 1 icon in the Calendar.
View the details of an activity	Click the link for the activity (appointment or task) that you want to view.
View the entire month's appointments	Click the 31 icon in the Calendar.
View the entire week's appointments	Click the 7 icon in the Calendar.

## Steps for Calendars and Activities

Click a topic to see step-by-step procedures to do the following:

- [Viewing Activities](#) (on page 89)
  - [Creating Activities](#) (on page 90)
  - [Updating Activities](#) (on page 91)
  - [Limiting Activity Records Displayed](#) (on page 91)
  - [Marking Tasks as Completed](#) (on page 92)
  - [Assigning Activities to Another Employee](#) (on page 92)
  - [Tracking Sales Calls to Customers](#) (see "Tracking Visits (Sales Calls) to Customers" on page 93)
- NOTE:** This feature might not be available in your version of the application as it is not part of the standard application.
- [Scheduling Appointments with Others](#) (on page 97)



If your user role includes the Share Calendar privilege, you can also perform these procedures:

- [Viewing Others' Calendars](#) (on page 99)
- [Sharing Your Calendar](#) (on page 100)
- [Setting Your Default Calendar View](#) (on page 101)
- [Adding Custom Calendar Views](#) (on page 101)

If your user role includes the Share Calendar privilege and your company uses the default group assignment option, you can also perform this procedure:

- [Viewing Group Task Lists](#) (on page 96)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Viewing Activities

Siebel CRM On Demand keeps your activities in the forefront by showing them on several pages:

- **My Homepage**

My Homepage contains separate lists for your appointments and tasks, sorted by date.

- **Calendar Pages**

The Calendar pages show your appointments as they would appear in an appointment book, opened to today's schedule. You can review other days by using the monthly calendars on the right or by clicking the 1, 7, and 31 icons above the appointments.

The Daily and Weekly Calendar pages also show a list of your tasks, sorted by due date by default.

- **Detail page for record types, such as Accounts, Contacts, and so on.**

The Detail pages contain sections showing open activities and completed activities linked to a specific record.

**NOTE:** You can also synchronize your activity records with the Offline edition of Siebel CRM On Demand as well as with Microsoft® Outlook.

### About Managing Tasks

One way of managing tasks is to prioritize them by importance or urgency. You prioritize a task by assigning it a level, such as High, Medium, or Low. Each level has a corresponding character or icon to indicate the priority of the task (up arrow for High, no arrow for Medium, down arrow for Low). You change the priority level of a task on the Task Edit page.

**NOTE:** Tasks appearing in red are past their due date.

For information about the Group Task List tab, available for companies that use the Group feature, see [Viewing Group Task Lists](#) (on page 96).

### Creating Activities

You always create an activity (task or appointment) by entering information in a form. You can access this form from different areas within the application, depending on what you are working on and what you need to do.

This section describes one method for creating an activity, which allows you to add the record while continuing with your work in the main area of the application. For a description of all the methods, see [Creating Records](#) (on page 32).

#### *To create an activity using the Create box*

- 1 From any page, go to the Create box in the left Action bar.
- 2 From the list, click the Appointment or Task link.
- 3 In the form, fill in the required activity information.
- 4 Save the record.

#### Related Topics

Activity Fields	104
Calendar Pages	87
Using the Offline Edition	326
Synchronizing with PIMs	333
Adding Emails from Microsoft Outlook and Lotus Notes	345

## Updating Activities

You can update the information in the activity record, including changing the record status to completed, if you have edit access to the record.

### *To update activity information*

- 1 Select the task or appointment.

For instructions on selecting activities, see [Finding Records](#) (on page 35).

- 2 On the Appointment or Task Detail page, edit the fields inline or click Edit to open the Appointment or Task Edit page. For more information on updating records, see [Updating Record Details](#) (on page 48).

## Limiting Activity Records Displayed

You can limit the activities you see by selecting a filtered list. A list shows a subset of the activities that meet the criteria saved within the list.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in the online help.

**Before you begin.** When you create a list, you need to enter the fields and values for the criteria you set up. You might want to go to the Task Edit or Appointment Edit page and write down the exact field names and values as they are used in your application. Otherwise, your filtered list might not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names; however, the printout does not capture all of the available field values for drop-down lists.

### *To open a filtered list for activities*

- 1 Click the Calendar tab.
- 2 From the Open Tasks section on the Calendar Page, click the Show Full List link.
- 3 On the Activities List page, change the selection in the drop-down list.

### *To create a filtered list for activities*

- 1 Click the Calendar tab.
- 2 From the Open Tasks section on the Calendar Page, click Show Full List.

- 3 On the Activity Lists page, click Menu and select Manage Lists.
- 4 On the Manage Lists page, click the New List button.
- 5 Complete the steps described in [Creating and Refining Lists](#) (on page 59).

## Marking Tasks as Completed

You can mark tasks as Completed. A completed task remains in certain lists, such as All Activities or My Activities. However, completed tasks do not remain on My Homepage.

If completed tasks are linked to records, they move from the Open Activities list to the Completed Activities list on the Detail page for that record.

### *To mark a task as Completed*

- 1 Select the task.  
For instructions on selecting tasks, see [Finding Records](#) (on page 35).
- 2 On the Task Detail page, click the Mark as Completed button.

## Assigning Activities to Another Employee

You can assign an activity to another employee if you have edit access to the record. Generally, you can edit a record if you own it or the owner reports to you. However, access levels can be adjusted to restrict a user's access.

After you assign an activity to another employee, the activity automatically appears in the new user's My Activities or My Tasks list. The assigned activity also maintains all prior associations for the activity. You can track tasks that you have assigned to others by using the Delegated task lists in the drop-down on your Activities Lists page.

### *To assign an activity to another employee*

- 1 Select the activity.  
For instructions on selecting activities, see [Finding Records](#) (on page 35).
- 2 On the Appointment Detail page, position your cursor in the Owner field and click the Lookup icon.
- 3 In the Search for a User window, click the Select link beside the name of the new owner.
- 4 On the Appointment Detail page, click the green check mark icon in the Owner field to save the changes.

## Tracking Visits (Sales Calls) to Customers

**NOTE:** This feature is only available in the Siebel CRM On Demand Life Science Edition.

You can track visits (sales calls) to customers, recording information such as the products you discussed, the samples you left, solutions you discussed, and related contacts.

You can also save the information as a template, called a *Smart Call*. The Smart Call template is helpful when you are visiting multiple customers for the same purpose, such as enrolling clinical investigators. You can keep the template private or make it available for others to use (public).

When you apply the Smart Call template to a new call, most information from the smart call automatically populates the new record, including the products detailed and samples dropped information related to the call. However, other fields, such as Lot Numbers for the samples dropped, are not saved as part of the template.

After you apply the Smart Call template to a call, you can then update the remaining fields to track the details of this visit.

If your company administrator included the Last Call Date field on your Account or Contact Edit page, that field is automatically updated on the linked account and all linked contacts. The update occurs when you change the call record's status to Completed and save the record. The field reflects the start time and date of the call.

For more information on Smart Calls, see [Managing Smart Calls](#) (on page 780).

### To track a visit (sales call) to a customer

- 1 Select the account or contact for your visit.  
For instructions on selecting records, see [Finding Records](#) (on page 35).
- 2 On the Account or Contact Detail page, scroll down to the Calls section, and click New Call.
- 3 On the Call Edit page, do the following:
  - a To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.
  - b Enter or update the information.

The following table provides additional information regarding some fields.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.  
Custom fields that your company administrator defined are saved in the Smart Call template.

Field	Description
<b>Key Call Information</b>	
Subject	Limited to 100 characters. The name of the Smart Call template.
Primary Contact	<p>Automatically populated and read-only.</p> <p>If this call is linked to both an account and contact, the call record appears as related information on both the Account and Contact Detail pages.</p> <p><b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.</p>
Account	<p>Automatically populated and read-only.</p> <p>If this call is linked to both an account and contact, the call record appears as related information on both the Account and Contact Detail pages.</p> <p><b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.</p>
Address	<p>Displays the full address, which is taken from the individual address fields for the account or contact record.</p> <p><b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.</p>
Smart Call	<p>If your user role includes the privilege, you can select a Smart Call template.</p> <p><b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a Smart Call template.</p>
Status	<p>Status of visit (call). When the status is updated to Completed, the last Call Date for the linked account and all linked contacts is updated with the start date/time of the call.</p> <p><b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.</p>
Activity Currency	You can select a different currency to convert the price to another currency, if your company administrator set that feature up.
Objective	Limit of 1,500 characters
Start Time	<p>Date and time the call starts. Defaults to today's date and 12:00 p.m.</p> <p><b>NOTE:</b> Defaults to This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.</p>

Field	Description
Duration	Calculated field (in minutes) based on start time and end time. <b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.
End Time	Defaults to start time plus 30 minutes. <b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.
Type	Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Personal, Presentation, Other, or To Do.
Call Type	Displays Account Call or Contact Call, depending on the type of call. Read-only.
Ref #	Text field that can be used to store the reference number of a related item such as a signed document. <b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.
<b>Additional Information</b>	
Cost	<b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.
Paper Sign	<b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.
Private	<b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.
Description	Limit of 2,000 characters.
Next Call	Limit of 1,500 characters. <b>NOTE:</b> This field is <i>not</i> copied over to the new record when you create a new call record from a smart call template.

- 4 Save the record.

#### *To link product detailed information to this call record*

- 1 On the Call Detail page, scroll down to the Product Detailed section, and click New.
- 2 On the Product Detailed Edit page, enter the required information.

**NOTE:** Product Detailed fields are copied over to the new record when you create a new call record from a smart call template.

- 3 Save the record.

*To link samples dropped information to this call record*

- 1 On the Call Detail page, scroll down to the Samples Dropped section, and click New.
- 2 On the Samples Dropped Edit page, enter the required information.  
**NOTE:** Samples Dropped fields are copied over to the new record when you create a new call record from a smart call template *except* for Lot #.
- 3 Save the record.

*To save the call information as a template*

- On the Call Detail page, click the appropriate button:
    - **Save as Private Smart Call.** Restricts the template for your use only.
    - **Save as Public Smart Call.** Adds the template to the list for others to use.
- NOTE:** Each time you click the button, the record is saved as a separate smart call. The application remains open on this page.

## Viewing Group Task Lists

If your company uses the group assignment option, you can view the consolidated list of tasks owned by members in your group. For more information about groups, see [About Groups](#) (on page 604).

*To view the group tasks lists*

- 1 On the Calendar page, click the Group Tasks tab.
- 2 From the drop-down list, select the list of tasks you want to view.  
The lists of tasks include any tasks created by a member of your group (except tasks that users have marked as private).



## Scheduling Appointments with Others

When you want to schedule an appointment and notify others of the appointment, follow this sequence:

- 1 Create an appointment.

- 2 Invite contacts and users.

When scheduling appointments with others, the application distinguishes between:

- **Contacts.** Customers, partners, and so on who are listed in your company information as contact records.
- **Users.** Siebel CRM On Demand users at your company.

- 3 Check the users' availability

You can view availability of users, but not contacts, since you do not have access to calendars that reside outside of the application.

**NOTE:** To perform this step, your user role must include the Share Calendar privilege.

- 4 Send notification of the appointment to all invitees.

### *To add invitees to the appointment*

- 1 Create the appointment; fill in the required fields, and save the record.

- 2 On the Appointment Detail page, scroll down to the Contacts section and click Add.

**NOTE:** You might have to add the Contact and User sections to your layout. For instructions, see [Changing Your Detail Page Layout \(on page 317\)](#).

- 3 On the Add Contacts page, click the Lookup icon.

- 4 In the Search for a Contact window, select an existing contact, or click New and create the contact record.

The selected contacts appear in alphabetical order.

- 5 Click OK.

**NOTE:** To change which contact appears as the Primary Contact, click the Edit link beside the appointment on the Calendar page. On the Appointment Edit page, click the Lookup icon beside the Primary Contact field, select the new primary contact, and click Save. The primary contact appears in the Calendar summary. The new primary contact is also added to the Contacts section of the Appointment Detail page, if it was not already there.

- 6 On the Appointment Detail page, scroll down to the Users section and click Add.

- 7 On the Add Users page, click the Lookup icon and select users you want to invite to the appointment.

The list that appears in the Search for a User window contains all Siebel CRM On Demand users at your company.

- 8 Click Save.

### *To check the users' availability*

- 1 On the Appointment Detail page, click the User Availability button.

For the User Availability button to appear, your user role must include the Share Calendar privilege.

A combined calendar appears showing the list of users and their calendars. Rows for users who have not shared their calendar with you appear as blank bars.

To view information about busy time shown on the calendar, hover over the appointment with your mouse.

- 2 To view the availability on another day, you can:
  - Click the arrows in the calendar header to scroll to the next or previous day
  - Click the calendar icon in the calendar header
- 3 Update the appointment date and time, if necessary.
- 4 Save the record.

### *To send an email notification to the invitees (contacts and users)*

- 1 On the Appointment Detail page, click Send Email.

- 2 An email opens with this information:

- **To.** Invitees (contacts and users)

If your list exceeds 70 invitees, the email is sent to the remaining invitees, but their email addresses do not appear in the To line.

- **Subject.** The word *Appointment* followed by the field values for subject, location, date, start time, date, and end time.

## Viewing Others' Calendars

**Before you begin.** To perform this procedure, your user role must include the Share Calendar privilege.

You can view:

- Another user's calendar

You can view the individual calendars of users in your group (if you are a member of a group), and the calendars of other users who explicitly share their calendar with you.

- A group calendar (if you are a member of a group) that combines the calendars of all the members of your group into a single calendar view

**NOTE:** The list shows the users in alphabetical order. If the list exceeds ten users, scroll through the list to view the additional users' calendars.

For more information about groups, see [About Groups](#) (on page 604).

- Custom views that combine other users' calendars

For example, you might be working on a special short-term project with a number of users in different functions. Setting up a custom view that includes calendars for only those users allows you to see the schedule for those users in a single view. When you set up a custom calendar view, you can add the following users to the view:

- Users who are members of your group (if you are a member of a group)
- Users who explicitly share their calendar with you

For more information on setting up custom calendar views, see [Adding Custom Calendar Views](#) (on page 101).

The calendars show the times in your local time zone, from 7 a.m. to 7 p.m. Also, only invitees and owners of appointments can view the details for private appointments.

### *To view another user's calendar*

- 1 On the Calendar page, click the User tab, if necessary.
- 2 In the title bar, click the Lookup icon and click the Last Name of the user in the Search for a User window.

That user's calendar populates the User view.

**NOTE:** Only users who share their calendars with you, and users who are members of your group, are available to select.

### *To quickly return to your own calendar*

- Click the My Calendar button in the title bar.

*To view a combined calendar for all group members*

- 1 On the Calendar page, click the Group tab.
- 2 On the combined calendar, you can:
  - Click the user's name to go to the user's personal calendar.
  - Click the date to go to the group view for that day.

## Related Information

See the following topic for related information about custom calendar views:

[Adding Custom Calendar Views](#) (on page 101)

## Calendar Setup Page

Click a topic to see instructions for doing the following from the Calendar Setup page:

- [Sharing Your Calendar](#) (on page 100)
- [Setting Your Default Calendar View](#) (on page 101)
- [Adding Custom Calendar Views](#) (on page 101)

## Sharing Your Calendar

**Before you begin.** To perform this procedure, your user role must include the Share Calendar privilege.

To extend access to your calendar beyond your group members, you need to explicitly share the calendar to the other user.

*To share your calendar*

- 1 On the Calendar pages, click Calendar Setup.
- 2 On the Calendar Setup page, click Share Calendar.  
In the Default Sharing section, the list of your group members appears.
- 3 Click Add Users.
- 4 On the Shared Calendar page, select the users.
- 5 Save your settings.

## Setting Your Default Calendar View

**Before you begin.** To perform this procedure, your user role must include the Share Calendar privilege.

You can set which default view you want to show whenever you click the Calendar tab.

### *To set up your calendar*

- 1 On the Calendar pages, click Calendar Setup.
- 2 On the Calendar Setup page, click Default Calendar View.
- 3 On the Default Calendar Settings page, select the option.
- 4 Save your setting.

## Adding Custom Calendar Views

**Before you begin.** To perform this procedure, your user role must include the Share Calendar privilege.

If you are a member of a group (and your role has the Share Calendar privilege), you can automatically view a merged calendar that combines the calendars of all the members in your group into a single calendar view. However, you might want to set up different, combined calendar views to meet your specific needs. To set up combined calendar views, add a custom view.

For example, you might be working on a special short-term project with a number of users across functions. Setting up a custom view that includes calendars for only those users allows you to see the schedule for those users in a single view. When setting up a custom calendar view, you can add the following users to the view:

- Users who are members of your group (if you are a member of a group)
- Users who explicitly share their calendar with you

### *To add a custom calendar view*

- 1 On the Calendar pages, click the Calendar Setup link.
- 2 On the Calendar Setup page, click Manage Group Views.  
On the Manage Views page, your group name appears in the Standard Views section.
- 3 Click Add.

- 4 On the Manage View page, enter a name and description of the view.  
**NOTE:** You cannot select an entire group to share calendars with; instead, you need to add each member of that group as a user to a custom view.
- 5 Save the record.
- 6 On the Manage Views page, click the Name of the new group.  
The Manage View Detail page appears.
- 7 Click Add Members, and select the users.
- 8 Save the record.  
On the Calendar Group tab, your new view appears in the drop-down list.

## Activities List Page

The Activities List page shows one of the following:

- All activities assigned to you, if you access the list directly from the Calendar pages.
- All activities assigned to you that are linked to a record, if you access the list from the record Detail page.

**NOTE:** If your company administrator added you to a group, a Group Tasks tab appears on your calendar pages.

From this page, you can create new activities or review multiple activities at a glance. You can edit fields inline on the Activities List page. You can also select an activity to review, update, or delete. For more information on updating records, see [Updating Record Details](#) (on page 48).

If you access the Activities List page from the Calendar pages, you can use the drop-down menu to switch to another activities list. The drop-down list contains both standard lists distributed with the application and custom lists for your company.

The following table describes what you can do from the Activities List page.

**NOTE:** If you access the Activities List page through a record Detail page, some of these features may not be available.

To do this	Follow these steps
Add activities to books or remove activities from books	On the Activities List title bar, click Menu, and select Batch Assign book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Create a new list of activities	On the Activities List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).

To do this	Follow these steps
Create a task	On the Activities List title bar, click New Task. On the Task Edit page, enter the required information and save the record.
Create an appointment	On the Activities List title bar, click New Appointment. On the Appointment Edit page, enter the required information and save the record.
Delete all records from the list	On the Activities List title bar, click Menu, and select Batch Delete. Complete the steps described in <a href="#">Deleting and Restoring Records</a> (on page 79).
Export the list	On the Activities List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find an activity (task or appointment)	Click the Subject column header to sort the data. Then click a letter in the alphabet bar. For activities beginning with numbers, click 0-9.
Manage all the activities lists	On the Activities List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Refine the search criteria for the list	On the Activities List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a group of activity records at once	On the Activities List title bar, click Menu, and select Mass Update. Complete the steps described in <a href="#">Updating Groups of Records</a> (on page 69).
Update an activity	Edit fields inline on the Activities List page or select the activity to open the Details page. For more information on updating records, see <a href="#">Updating Record Details</a> (on page 48).
View a subset of activities (tasks or appointments)	On the Activities List title bar, click the drop-down list and change the selection (Completed Tasks, Open Tasks, All Tasks, or All Appointments).
View all activities (tasks and appointments)	On the Activities List title bar, click the drop-down list and select All Activities.

## Standard Activities Lists

The following table describes the standard lists.

Activities List	Filters
Open Activities	<p>Combined list of:</p> <ul style="list-style-type: none"> <li>■ Tasks with any status except Completed that are assigned to you</li> <li>■ Future appointments that are assigned to you</li> </ul>

Activities List	Filters
Delegated Tasks - Completed	Tasks that you created and assigned to other users that have a status of Completed
Delegated Tasks - Open	Tasks that you created and assigned to other users that have any status except Completed
Delegated Tasks - Overdue	Tasks that you created and assigned to other users that are overdue
All Activities	All activities: tasks and appointments
All Appointments	All appointments
All Tasks	All tasks
Completed Tasks	Tasks with status of Completed
Open Tasks	Tasks with any status except Completed

## Activity Fields

Use the Task Edit page to add a task or update details for an existing task. Use the Appointment Edit page to add an appointment or update details for an existing appointment. The Edit pages show the complete set of fields for a task or appointment.

**TIP:** You can also edit activities on the Activities List page and on the Appointment and Task Detail pages. For more information on updating records, see [Updating Record Details](#) (on page 48).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Account	Account linked to this activity.
Campaign	Campaign linked to this activity.
Primary Contact	Primary contact linked to this activity. For companies using the Group feature, this contact is the Primary Contact on the Calendar views.
Delegated By	User who created the task and then assigned it to another owner.
Description	Additional information about this activity. Limit of 2,000 characters.
Due Date	Date this task is due (applies only to tasks).



Field	Description
End Time	Date and time the appointment concludes (applies only to appointments). Defaults to today's date and 1:00 p.m.
Lead	Lead linked to this activity.
Location	Place where the appointment takes place (applies only to appointments).
Modified By	Name of the person who creates or updates the activity record followed by the date and time it is created or updated. System-generated.
Opportunity	Opportunity linked to this activity.
Owner	Owner of this activity.
Priority	Priority level, such as 1-High, 2-Medium, or 3-Low (applies only to tasks).
Private	Indication that the activity record can be seen only by you even if the activity is linked to a record visible to others. When synchronizing with Microsoft Outlook, you can set up a filter for excluding Private records from being uploaded to Siebel CRM On Demand using this field. For more information, see <a href="#">Synchronizing with PIMs</a> (on page 333).
Service Request	Service request linked to this activity.
Start Time	Date and time the appointment starts (applies only to appointments). Defaults to today's date and 12:00 p.m.
Status	Status of task, such as Completed, Deferred, In Progress, Waiting For Someone Else, or Not Started. Defaults to In Progress.
Subject	Title or short description of this activity.
Type	For tasks, this refers to a category, such as Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Personal, Presentation, Other, or To Do.
Type	On the Activities List page, this refers to the type of activity, either Task or Appointment.



# 3 Campaigns

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Use the Campaign pages to create, update, and track campaigns. A *campaign* is a vehicle or project that conveys a marketing message to both existing and potential customers.

## About Campaigns

A *campaign* is the vehicle or project in which you convey a marketing message to one or more groups of people. Typically, campaigns deliver a promotional offer across channels of communication to retain current customers or to acquire new customers. The goal is to generate additional interest in company products and services, ultimately driving additional revenue.

Using campaigns allows you to:

- Store campaign information such as budgeted costs compared with actual costs, targeted leads, and marketing material (for example, brochures and artwork) in one place.
- Share views of campaigns with the entire marketing team and share consistent campaign information with your sales team from the same location in real time.
- See your campaign results by viewing leads and opportunities generated by the campaign.
- Use prebuilt reports to measure the results and determine the return on investment of your campaign activities in real time.
- Make historical comparisons between current and past campaigns to identify trends.

Sales and marketing managers can import leads and link them to an existing campaign. Lead information must first be formatted in a comma-separated value (.csv) file.

## Campaigns, Leads, Opportunities, and Contacts

In the course of a campaign, you can generate multiple leads that are linked to the campaign. If you convert some of those leads to opportunities or contacts, the link to the campaign is carried over from the originating leads to the converted opportunities and contacts.

For example, Campaign A creates 100 leads L1 through L100. You link each of these leads to Campaign A. Leads L1 through L90 never show promise of producing revenue. Leads L91 through L100 do show revenue potential, so you convert them to opportunities O1 through

O10. Each of these opportunities is automatically linked to Campaign A by way of its originating lead.

Several months later, you want to review the effectiveness of Campaign A. You view the Campaign A record and see that there are 100 leads and 10 opportunities linked to it. You can compare these results to past campaigns or to your expectations for this campaign, and make adjustments accordingly.

**NOTE:** If your administrator adds custom fields for leads, those fields are not carried over to the opportunity records when the lead is converted to an opportunity or contact. An exception occurs if your company administrator sets up additional mapping through the Lead Conversion Mapping feature. For more information about mapping lead fields, see [Mapping Additional Fields During Lead Conversion](#) (on page 642).

## Campaign Homepage

The Campaign Homepage is the starting point for managing campaigns. This page contains several sections and displays campaign information that is relevant to you.

### Campaign Lists Section

The Campaign Lists section shows this information:

- **Campaign Lists.** The first 10 filtered lists. Filtered lists are subsets or groups of campaigns that allow you to limit the number of campaigns to work with at a time.

The application comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

If an already-created list does not appear on the Campaigns Homepage, click any list. Then, on the Campaign List page, click the drop-down list to see all the available lists, and make your selection.

The following table describes the standard lists.

Campaign List	Filter
All Campaigns	None. The list shows all campaigns for your company, sorted by Campaign Name, in ascending order.
All Active Campaigns	Status = Active
All Completed Campaigns	Status = Completed
All Planned Campaigns	Status = Planned

Campaign List	Filter
All Recently Created Campaigns	All campaigns, sorted by the created date, with the most recently created campaign at the top of the list
All Recently Modified Campaigns	All campaigns, sorted by the modified date, with the most recently modified campaign at the top of the list
My Recently Modified Campaigns	All campaigns owned by you. The list is sorted by the modified date, with the most recently modified campaign at the top of the list.

For information on creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** This link takes you to the page where you can review all available filtered lists, create a new list, or view, edit, or delete an existing list. The Manage Lists page also includes the standard lists delivered with Siebel CRM On Demand. These lists are view-only; therefore you cannot edit or delete them.

## Recently Modified Campaigns Section

The Recently Modified Campaigns section shows this information:

- **Recently Modified Campaigns list.** List of the most recently modified or created campaigns.
- **Show Full List.** Link for expanding the list of filtered lists.

## Campaign-Related Tasks Section

The Campaign-Related Tasks section shows this information:

- **Campaigns-Related Tasks list.** Top tasks assigned to you, sorted by due date and then priority.
- **Due Date.** Date task is due as set by you or your manager.
- **Arrow symbol.** Priority for tasks as set by you or your manager. An upward pointing red arrow indicates high priority, a downward pointing green arrow indicates low priority, and no arrow indicates medium priority.
- **Subject.** Task subject. Click the link to review the task.
- **Campaign.** Campaign name. Click the link to review the campaign with which the task is associated.
- **Show Full List.** Link for expanding the list of campaign-related tasks.

### Active Campaigns Section

The Active Campaigns section shows this information:

- **Active Campaigns list.** List of campaigns currently being run.
- **Campaign Name.** Link for opening the campaign record.
- **Show Full List.** Link for expanding the list of filtered lists.

### Active Campaigns Status Section

The Active Campaign Status section shows an analysis of all active campaigns, which you can use to determine the effectiveness of your campaigns.

In this section, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view the same data from another perspective. For example, you can view analyses of campaigns by ROI (return on investment), lead conversion rate, or cost per lead.

## Steps for Campaigns

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32)
- [Updating Record Details](#) (on page 48)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Working with Lists](#) (on page 56)
- [Closing Campaigns](#) (on page 111)
- [Targeting Contacts for Campaigns](#) (on page 111)
- [Recording Responses to Campaigns](#) (on page 112)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

**Related Topics**

Campaign Fields	113
Campaign Homepage	108
Campaign List Page	113
About Campaigns	107
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Importing Your Data	749

## Closing Campaigns

You can change the campaign status to indicate it is completed.

### *To close a campaign*

- 1 On the Campaign List page, click in the Status field.
- 2 Select the Completed status from the drop-down list.
- 3 Click the green check mark icon in the Status field to save the record.

## Targeting Contacts for Campaigns

You can select contacts that you want to target for a campaign.

**NOTE:** If your company uses Segmentation Wizard, a downloadable application that works between Siebel CRM On Demand and Excel, you can build target segments that filter records according to criteria from a number of record types. To download the Segmentation Wizard application, click the Training and Support link in the upper right corner of any page to open the Training and Support Center page. On that page, click the Search Knowledge link, and then sign in to *OracleMetaLink*. (If you already have an Oracle.com account, you can sign in to *OracleMetaLink* without registering. Otherwise, you can register as a new user.) In the *OracleMetaLink* Knowledge page, click the Downloads link, and then click the link to download the application.

### *To target contacts for a campaign*

- 1 Select the campaign.  
For instructions on selecting campaigns, see [Finding Records](#) (on page 35).

- 2 On the Campaign Detail page, scroll down to the Recipients section and do the following:
  - To target contacts one by one, click Add.
  - To remove the contact, click the Remove link in the record row. This disassociates the records without deleting any records.
- 3 Save the record.

## Recording Responses to Campaigns

When you want to record the response to a campaign, such as the fact that a recipient attended an event, you can track that in the campaign recipient section.

### *To record a response to a campaign*

- 1 Select the campaign.  
For instructions on selecting campaigns, see [Finding Records](#) (on page 35).
- 2 On the Campaign Detail page, scroll down to the Recipients section, and click Edit for the contact whose response you want to record.
- 3 On the Campaign Response Edit page, fill in the information.

Field	Description
Delivery Status	<p>The standard values are Pending, Sent, Soft Bounce, Hard Bounce, Unknown Bounce, Received, and Opened. However, your company administrator can rename the options in this drop-down list.</p> <p>If your company uses Email Marketing On Demand, the recipient delivery status is automatically updated (for the Soft Bounce, Hard Bounce, or Message Opened values only).</p>
Response Status	<p>The standard values are Click-thru, RSVP - Will Attend, RSVP - Will Not Attend, Attended, Converted to Lead, Requested More Info, Opt-in to List, Opt-out from List, Global Opt-in, Global Opt-out, and Message Opened. However, your company administrator can customize the options in this drop-down list.</p> <p>If your company uses Email Marketing On Demand, the response status is automatically updated (for the Click-thru, Opt-in to List, Opt-out from List, Global Opt-in, Global Opt-out, or Message Opened values only).</p>

- 4 Save the record.



## Campaign List Page

The Campaign List page shows the subset or list of campaigns you selected in the Campaign Homepage. From the Campaign List page, you can review multiple campaigns at a glance. You can edit fields inline on the Campaign List page. You can also select a campaign to review, update, or delete. For more information on updating records, see [Updating Record Details](#) (on page 48).

Using the drop-down menu, you can also switch to another campaign list. The drop-down list contains both standard lists distributed with the application and custom lists for your company.

The following table describes what you can do from the Campaign List page.

To do this	Follow these steps
Create a campaign	On the Campaign List title bar, click New Campaign. On the Campaign Edit page, enter the required information and save the record.
Create a new list of campaigns	On the Campaign List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Export the list	On the Campaign List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a campaign	Click a column header to sort the data. Then click a letter in the alphabet bar. For values beginning with numbers, click 0-9.
Manage all the campaign lists	On the Campaign List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Refine the search criteria for the list	On the Campaign List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more/fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Campaign List title bar, click Menu, and select Show List Filter. See <a href="#">View List Page</a> (on page 65) for an explanation of the information.
View a different subset of campaigns	On the Campaign List title bar, click the drop-down list and change the selection to another filtered list.

## Campaign Fields

Use the Campaign Edit page to add a campaign or update details for an existing campaign. The Campaign Edit page shows the complete set of fields for a campaign.

**TIP:** You can also edit campaigns on the Campaign List page and the Campaign Detail page. For more information on updating records, see [Updating Record Details](#) (on page 48).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Campaign Information</b>	
Source Code	Campaign identifier code. Make sure the code you enter is unique.
Campaign Name	Descriptive name of the campaign.
Campaign Type	Type of campaign, such as Advertisement, Direct Mail, Email, Event - Other, Event - Seminar, Event - Trade Show, List - Purchased, List - Rented, Other, Referral - Employee, Referral - External, or Web Site.
Objective	Description of the campaign's objective, such as "To increase sales by 10%."
Audience	Target audience of the campaign.
Offer	Description of the product or service the campaign is offering.
Status	<p>Campaign status, such as:</p> <ul style="list-style-type: none"> <li>■ <b>Active.</b> Start date is in the past and end date is in the future</li> <li>■ <b>Completed.</b> Start and end dates are in the past.</li> <li>■ <b>Planned.</b> Start and end dates are in the future.</li> </ul> <p>You must set the status. The system does not automatically update it when the campaign is launched, unless your company uses Email Marketing On Demand.</p>
Start Date	Date and time the campaign starts. Defaults to the current date and time. You can use the calendar controls to change this date.
End Date	Date and time the campaign is scheduled to be completed. Defaults to the current date and time. You can use the calendar controls to change this date.
<b>Campaign Plan Information</b>	
Revenue Target	Revenue expected to be generated by the campaign.
Leads Targeted (#)	Number of prospects the campaign targets.
Budgeted Cost	Amount your company budgets for this campaign.
Actual Cost	Amount your company is spending on this campaign.

Field	Description
<b>Additional Information</b>	
Owner	<p>Alias of the record owner. Defaults to the campaign's creator. Generally, owners can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>
Modified By	Name of the person who created or last updated the campaign record, followed by the date and time of the update. System-generated.
Description	Description of the campaign. Limit of 2,000 characters.



# 4 Leads

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Use the Leads pages to create, update, and evaluate leads. A *lead* is a person who has indicated an interest in your products or services.

## About Leads

A *lead* is a person who has indicated an interest in your products or services. You can enter leads manually or they can be assigned to you. Assigned leads require some follow-up to determine if they have a chance of eventually generating revenue for the company.

Creating a lead record is a quick way to gather new customer information. In one record you can enter details about the company, the person, and the business interest, instead of creating three different records for an account, a contact, and an opportunity.

A lead moves through the lead management process in this sequence of stages: evaluating, qualifying, and converting to an opportunity. Instead of being qualified, a lead may be removed by archiving it. Instead of being converted to an opportunity, a qualified lead may be removed by rejecting it. The next section explains the stages in more detail.

## Evaluating Leads

During evaluation, the person evaluating the lead performs a number of ongoing activities:

- Calls, emails, or visits the contact to exchange information.
- Updates specific information about the lead with more accurate and newly discovered information.
- Creates, tracks, and completes activities regarding the lead.
- Logs notes regarding the interaction.
- (Optional but recommended) Links the lead to an account and a contact, which has these advantages:
  - The user assigned to the account or contact (who may or may not also be the user assigned to the lead) can view the lead during the evaluation process, because it will appear in the Account and Contact pages.

- The lead owner can access additional information about the account or contact by clicking a link.
- The lead owner can enter more details than can typically be stored with a lead, such as additional contacts at the account, ship to address, and so on.
- If the lead is converted to an opportunity, the existing account and contact links can speed up that process.

### Qualifying Leads

The qualification process helps the evaluator to gather enough information to determine which leads to pursue further. When the evaluator determines that a lead has some potential for generating revenue, the evaluator qualifies the lead. The system then checks to make sure that certain critical fields contain data. If the criteria have been met, the lead is marked as qualified, and becomes visible to the sales person as a newly qualified lead.

Qualifying leads accurately helps your company to spend more time working on high-potential business deals. Company administrators can set up Lead Qualification scripts to help evaluators to qualify leads accurately and consistently. (For information on setting up assessment scripts, see [Setting Up Assessment Scripts](#) (on page 770)).

### Archiving Leads

Alternatively, if the lead is considered to have no value to the company, then the evaluator can archive the lead. The system then removes the lead from the lead management process.

**TIP:** To sort archived leads, create a new list called [Archived Leads](#). For more information on creating lists, see [Creating and Refining Lists](#) (on page 59).

### Converting Leads to Opportunities

If a lead has enough potential value, the evaluator can convert it to an opportunity. The system prompts the evaluator for an account to link to the lead, a contact at that account to link to the lead, and an opportunity to link to the lead.

The system then creates a new opportunity with some values carried over from the lead, such as potential revenue and estimated close date. The system then removes the lead from active evaluation (although it can still be viewed if desired).

#### What Happens During Conversion

Some information from the lead record is carried over to the relevant areas in the Account, Contact, and Opportunity records that are created during the conversion process. The following table shows how the fields are mapped among the records.

Lead	Account	Opportunity	Contact
Address	Billing Address Shipping Address		Primary Address
Annual Revenues	Annual Revenues		

Lead	Account	Opportunity	Contact
Cellular Phone #			Cellular Phone #
City	Billing City Shipping City		Primary City
Company	Account Name	Account	Account
Country	Billing Country Shipping Country		Primary Country
Description		Description	
Email			Email
Estimated Close Date		Close Date	
First Name			First Name
Industry	Industry		
Job Title			Job Title
Last Name			Last Name
Lead Owner			
Mr./Ms.			Mr./Ms
Never Email			Never Email
Next Step		Next Step	
Number of Employees	Number of Employees		
Potential Revenue		Revenue	
Primary Phone #			Work Phone #
Product Interest		Opportunity Name becomes: Product Interest (Contact Full Name)	
Rating			
Source		Lead Source	Lead Source

Lead	Account	Opportunity	Contact
State/Province	Billing State/Province Shipping State/Province		Primary State/Province
Website	Web Site		
Work Fax #			Work Fax #
Zip/Postal Code	Billing Zip Code Shipping Zip Code		Primary Zip/Postal Code

Additionally, some fields show different values as a result of the lead conversion process. The following table lists the new values.

This record/field	Changes to this value
<b>Lead record</b>	
Status	Converted
<b>Account record</b>	
Account Type	Prospect
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.
<b>Opportunity record</b>	
Status	Pending
Sales Stage	Building Vision
Probability	50%
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.
<b>Contact record</b>	
Contact Type	Prospect
Owner	User converting the lead. See the following section, Ownership of Related Lead Records After Conversion.

## Ownership of Related Lead Records After Conversion

If you have populated the Sales Person field, when the lead is converted that person becomes the owner of all related records. If this field is not populated, the user converting the lead becomes the owner of all related records by default. However, the company administrator can change this behavior using the Lead Conversion Mapping feature. For more information, see [Mapping Additional Fields During Lead Conversion](#) (on page 642).



## Rejecting Qualified Leads

Qualified leads can also be rejected. This is typically done in organizations where the person or group evaluating leads is different from the sales people who take qualified leads and convert them into revenue. In those organizations, the sales person assigned to a qualified lead may determine that the lead is not as valuable as the evaluator had indicated.

When rejecting a lead, the sales person must specify a reason for the rejection. The system records that a rejection occurred, who rejected it, and why it was rejected.

The sales person may also choose to have the lead reassigned as part of the rejection. Depending on the company's policies, the lead may be reassigned to a manager for follow-up, or it may go back to the original evaluator for further assessment.

## Leads Homepage

The Leads Homepage is the starting point for managing leads. This page contains several sections and displays lead information that is relevant to you. If your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

The following are some of the sections that can be displayed on your Leads Homepage:

### Lead Lists Section

The Lead Lists section shows this information:

- **Lead Lists.** The first ten filtered lists. Filtered lists are subsets or groups of leads that allow you to limit the number of leads to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the Leads Homepage, click any list. Then, on the Leads List page, click the drop-down list to see all the available lists, and make your selection.

The following table describes the standard lists.

Leads List	Filter
All Converted Leads	Status = Converted
All Leads	none
All Leads Being Qualified	Status = Qualifying
All Qualified Leads	Status = Qualified

Leads List	Filter
All Recently Created Leads	All leads, sorted by the created date
All Recently Modified Leads	All leads, sorted by the modified date
All Rejected Leads	Status = Rejected
My Leads	Leads, sorted by the created date, that meet either of these conditions: <ul style="list-style-type: none"> <li>■ Sales Person = your user name and Status = Qualifying</li> <li>■ Lead Owner = your user name, Sales Person is blank, and Status = Qualifying</li> </ul>
My New Leads	Leads, sorted by the created date, that meet either of these conditions: <ul style="list-style-type: none"> <li>■ Sales Person = your user name and Status = Qualified</li> <li>■ Lead Owner = your user name, Sales Person is someone else, and Status = Qualifying</li> </ul>

For information on creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** This link takes you to the page where you can review all available filtered lists, create a new list, or view, edit, or delete an existing list. The Manage Lists page also includes the standard lists delivered with Siebel CRM On Demand. These lists are view-only; therefore you cannot edit or delete them.

## My Recently Viewed Leads Section

The My Recently Viewed Leads section shows this information:

- **My Recently Viewed Leads list.** List of the ten most recently viewed leads.
- **Show Full List.** Link for expanding the list of recently viewed leads.

## My Open Lead Related Tasks Section

The My Open Lead Related Tasks section shows the open lead-related tasks assigned to you, sorted by due date and then by priority. It also shows this information:

- **Due Date.** Date task is due as set by you or your manager.
- **Arrow symbol.** Priority for tasks as set by you or your manager. An upward pointing red arrow indicates high priority, a downward pointing green arrow indicates low priority, and no arrow indicates medium priority.
- **Subject.** Title of task. Click the link to review the task.
- **Lead.** Lead with which the task is associated. Click the link to review the lead.
- **Show Full List.** Link for expanding the list of lead-related tasks.

## Qualified Leads Section

The Qualified Leads section shows this information:

- **Qualified Leads list.** List of qualified leads.
- **Show Full List.** Link for expanding the list of qualified leads.

## Lead Followup Analysis Section

Your company administrator can change the analysis shown in this section. In the standard application, the Lead Followup Analysis section provides information to help you to analyze the progress made towards qualifying leads in the last 90 days.

In this section, you can view data by month or week to see the status of leads for those periods. Use this information to help you to identify what needs to be done to move the leads forward through the sales process.

## Other Sections

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Leads Homepage:

- My Recently Created Leads
- My Recently Modified Leads
- Recently Created Leads
- Recently Modified Leads
- My Current Lead Related Tasks
- Lead Tasks

### *To add sections to your Leads Homepage*

- 1 On the Leads Homepage, click the Edit Layout link.
- 2 On the Lead Homepage Layout page, use the directional arrows to add or remove sections, and to organize the sections on the page.
- 3 Click Save.

## Steps for Leads

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32)

**NOTE:** If you are using Siebel CRM On Demand Financial Services Edition and taking advantage of the Referrals feature, new leads are also created when you link new referrals to contacts.

- [Reassigning Leads](#) (on page 124)
- [Updating Record Details](#) (on page 48)
- [Qualifying Leads](#) (on page 125)
- [Using Lead Qualification Scripts](#) (on page 126)
- [Archiving Leads](#) (on page 126)
- [Converting Leads to Accounts, Contacts, or Opportunities](#) (on page 127)
- [Rejecting Leads](#) (on page 129)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Working with Lists](#) (on page 56)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Reassigning Leads

When you create a lead, you automatically become that lead's owner. If your access level permits editing this record, you can reassign the lead to another person. Your administrator can also set up the system to assign leads by specifying assignment rules.

### *To reassign a lead*

- 1 Select the lead you want to reassign.

For instructions on selecting leads, see [Finding Records](#) (on page 35).

- 2 On the Lead Detail page, click Edit.

- 3 On the Lead Edit page, do one of the following:
  - In the Lead Owner field, click the Last Name link to select another person.
  - Select the Reassign Lead Owner check box to have the system reassign the lead.

- 4 Save the record.

**NOTE:** The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

## Qualifying Leads

If you determine that a lead has some potential for becoming an opportunity, you can qualify the lead. Normally, you select a rating for the lead according to a scale set up by your administrator.

**NOTE:** Your company administrator might have set up assessment scripts to help you to evaluate leads for qualification. For more information on using Lead Qualification scripts, see [Using Lead Qualification Scripts](#) (on page 126).

**Before you begin.** To perform this procedure, your user role must include the Qualify Leads privilege.

### *To qualify a lead*

- 1 Select the lead.

For instructions on selecting leads, see [Finding Records](#) (on page 35).

- 2 On the Lead Detail page, make sure that the lead record's First Name, Last Name, Rating, Lead Owner, and Sales Person fields are filled.

**NOTE:** This information helps to ensure that leads are not lost after they are qualified, and that valuable sales resources are used to full advantage to follow up leads that will evolve into a sales opportunity. In particular, if the Rating and Sales Person fields are not filled, you will not be able to set the status of the lead to Qualified.

- 3 Click Mark as Qualified.

The system verifies that the critical fields contain data. If the criteria are met, the lead Status field value changes to Qualified.

## Using Lead Qualification Scripts

Your company administrator might have set up assessment scripts to help you to evaluate leads for qualification. A Lead Qualification script consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weighting, and compared with a specified threshold to determine the appropriate outcome or course of action.

**CAUTION:** If a Lead Qualification script attempts to set the Status field on a lead to Qualified, it cannot do so unless the Rating and Sales Person fields on the lead are filled in. If these fields are not filled in, an error message is displayed, and the script assumes the lead has failed to meet the threshold. The script then sets the Status field according to the results defined on the script for failing to meet the threshold.

### *To use a lead qualification script*

- 1 Select the lead.

For more information on selecting leads, see [Finding Records](#) (on page 35).

- 2 On the Lead Detail page, scroll down to the Lead Qualification Scripts section, and click Add.

**NOTE:** If the Lead Qualification Scripts section is not shown, click the Edit Layout link in the upper-right corner of the page, and add the Lead Qualification Scripts section to your page layout. This section is only available if the company administrator has set up a Lead Qualification script.

- 3 In the search window, search for the appropriate script, and click Select. You can use the filter fields at the top of the search window to filter the list of scripts.

- 4 In the Lead Qualification Scripts window, select the answer for each script question, and click Save.

The Lead Detail page appears again. Depending on the outcome of the script, some of the fields on the record might have been updated automatically.

## Archiving Leads

Instead of qualifying a lead, you can specify that it is not worth pursuing and remove it from the assessment process. Archiving a lead does not delete it, but retains the lead in the database with a status of Archived.

**Before you begin.** To perform this procedure, your user role must include the Archive Leads privilege.

### *To archive a lead*

- 1 Select the lead you want to archive.

For instructions on selecting leads, see [Finding Records](#) (on page 35).

- 2 On the Lead Detail page, click Archive.

The lead Status field changes to Archived.

### Related Topics

Lead Detail Page	131
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## Converting Leads to Accounts, Contacts, or Opportunities

**Before you begin.** To perform this procedure, your user role must include the Convert Leads privilege and it must have certain access settings to records (see [Adding Roles](#) (on page 608)).

You can create account, contact, and opportunity records or merge lead information with existing records by *converting* the lead record. Depending on your company's settings, the new opportunity record can include information that impacts revenue calculations.

**NOTE:** Normally, you convert leads to opportunities that have previously been qualified. See [Qualifying Leads](#) (on page 125).

The procedure in this section describes the steps for these two scenarios:

**Scenario 1.** You have new leads resulting from a campaign your company conducted. As part of each lead record, you have a person's name along with their company name. You now want to create a new contact, a new account, and, potentially, a new opportunity record using information from the lead.

**Scenario 2.** You run a campaign targeted at existing accounts and contacts. Some leads are generated that you now want to convert to opportunities.

### *To convert a lead to an account, contact, or opportunity*

- 1 Select the lead you want to convert.

For instructions on selecting leads, see [Finding Records](#) (on page 35).

- 2 On the Lead Detail page, click Convert.

- 3 On the Convert Lead page, do one of the following:

- To create new account and contact records for this lead (Scenario 1), select the Auto-Create New Account and Auto-Create New Contact option buttons.

In the Account section, the Company field for the lead appears in the Account Name field by default. In the Contact section, the First Name and Last Name for the lead appear by default.

- To create a new opportunity and link the opportunity to an existing account and contact, select the Use Existing Account and Use Existing Contact option buttons.

If the lead record has an associated account, this account appears in the Associated Account field. If the lead record has an associated contact, this contact appears in the Associated Contact field.

- To link the lead to a different account or contact, click the Lookup icon next to the Associated Account or Associated Contact fields and select another account and contact. Make sure the proper names appear in the Associated Account and Associated Contact fields and that the Use Existing Account and Use Existing Contact option buttons are selected.

- 4 (Optional) To convert the lead to an opportunity, select the Create Opportunity check box and complete the fields.

The First Name and Last Name for the lead appear in the Opportunity Name field by default. Data in the potential revenue, close date, next step, and description fields are also carried into the opportunity record. This data can be edited in the Convert Lead page.

**NOTE:** You must complete Step 3 (link an account and contact to the lead) before you convert the lead to an opportunity.

- 5 To convert the lead, click Save.

When the conversion is completed:

- The Lead Detail page appears again with these values, most based on the selections you made on the Convert Lead page:
  - The Status field for the lead is Converted.
  - The Associated Account and Associated Contact field values are the same as the ones that were on the Convert Lead page.
  - If you converted the lead to an opportunity, the Associated Opportunity field value is the same as the new opportunity name that was on the Convert Lead page.
  - If you converted the lead to an opportunity, the new opportunity record created from the conversion process has the converted Lead linked to the opportunity record.
- If you converted the lead to an opportunity (Step 4), the new opportunity record inherits some field values from the lead.
- You can still view the lead record, but the business processes shift to the opportunity record.

**NOTE:** For further information about the conversion process and its impact on fields and values, see [What Happens During Conversion in About Leads](#) (on page 117). For further information on deleting records, see [Deleting and Restoring Records](#) (on page 79).



## Rejecting Leads

Instead of converting a qualified lead to an opportunity, you might decide that the lead is not as valuable as the evaluator indicated and remove it from the lead management process. Rejecting a lead does not delete it, but retains the lead in your company's records with a status of Rejected.

**Before you begin.** To perform this procedure, your user role must include the Reject Leads privilege.

### *To reject a qualified lead*

- 1 Select the lead you want to reject.  
For instructions on selecting leads, see [Finding Records](#) (on page 35).
- 2 On the Lead Detail page, click Reject.
- 3 On the Reject a Lead page, enter this information:
  - In the Reject Reason field, enter the reason for the rejection.
  - To reassign the lead to a new owner, select the Reassign Lead Owner check box.  
  
The system reassigns the lead based on lead assignment rules set by your company's administrator. Depending on your company's policies, the rejected lead may be reassigned to the original owner or to the original owner's manager.
- 4 Click Confirm Reject.  
  
The Lead Detail page reappears with information about the rejection, including your name and the reason for the rejection. The lead Status field value is changed to Rejected.

### Related Topics

Lead Detail Page	131
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## Leads List Page

The Leads List page shows the subset or list of leads you selected in the Lead Homepage. From the Leads List Page, you can review multiple leads at a glance. You can edit fields inline on the Leads List page. You can also select a lead to review, update, or delete. For more information on updating records, see [Updating Record Details](#) (on page 48).

Using the drop-down menu, you can also switch to another leads list. The drop-down list contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table in [Leads Homepage](#) (on page 121).

## Leads

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The following table describes what you can do from the Leads List Page.

**NOTE:** If you access the Leads List page through a record Detail page, some of these features are not available.

To do this	Follow these steps
Add leads to books or remove leads from books	On the Leads List title bar, click Menu, and select Batch Assign book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Create a new list of leads	On the Leads List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Create a lead	On the Leads List title bar, click New Lead. On the Lead Edit page, enter the required information and save the record.
Delete all records from the list	On the Leads List title bar, click Menu, and select Batch Delete. Complete the steps described in <a href="#">Deleting and Restoring Records</a> (on page 79).
Export the list	On the Leads List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a lead	Click a column header to sort the data. Then click a letter in the alphabet bar. For field values beginning with numbers, click 0-9.
Manage all the leads lists	On the Leads List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Leads List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more/fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Leads List title bar, click Menu, and select Show List Filter. See <a href="#">View List Page</a> (on page 65) for an explanation of the information.
Update a group of lead records at once	On the Leads List title bar, click Menu, and select Mass Update. Complete the steps described in <a href="#">Updating Groups of Records</a> (on page 69).
View a different subset of leads	On the Leads List title bar, click the drop-down list and change the selection to another filtered list.
View all leads	On the Leads List title bar, click the drop-down list and select All Leads.

## Lead Detail Page

Click a topic to see instructions for doing the following from the Lead Detail page:

- [Updating Record Details](#) (on page 48)
- [Converting Leads to Accounts, Contacts, or Opportunities](#) (on page 127)
- [Reassigning Leads](#) (on page 124)
- [Qualifying Leads](#) (on page 125)
- [Rejecting Leads](#) (on page 129)
- [Archiving Leads](#) (on page 126)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Changing Your Detail Page Layout](#) (on page 317)

## Leads Fields

Use the Lead Edit page to add a lead or update details for an existing lead. The Lead Edit page shows the complete set of fields for a lead.

**TIP:** You can also edit leads on the Leads List page and the Lead Detail page. For more information on updating records, see [Updating Record Details](#) (on page 48).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Lead Information</b>	
Company	For a company, corresponds to the account name.
Created By	Alias of the person who creates the lead followed by the date and time the lead is created. System-generated.
Never Email	Indication of the lead's preference to receive emails or not.
Modified By	Name of the person who created or last updated the lead record, followed by the date and time of the update. System-generated.

Field	Description
<b>Opportunity Related Information</b>	
Status	Status of the lead, such as Qualifying, Qualified, Converted, Rejected, and Archived. Can only be changed on the Lead Edit page, <i>not</i> on the New Lead page.  For more information about this field's values and their meanings, see Status Field Values below.
Rating	Scale rating as set up by your company, such as A = Hot, B = Warm, C = Cool, and D = Cold.
Product Interest	Product or service in which the lead expresses interest.
Potential Revenue	Potential revenue, in the currency selected by you or your company administrator.
Estimated Close Date	Date and time the lead is expected to close.
Next Step	Description of the next step to take.
Source	Source categories as set up by your company, such as Advertising, Direct Mail, Event, Promotion, Referral, Trade Show, Web, Partner, Purchased, Rented, and Other.
Campaign	Campaign that generates this lead or is linked to this lead.
Industry	Industry category for the lead as set up by your company.
Annual Revenues	Annual revenue for the lead's company.
<b>Additional Information</b>	
Associated Account	Account linked to this lead. Required for converting leads to opportunities.
Associated Contact	Contact linked to this lead. Required for converting leads to opportunities.
Associated Opportunity	Opportunity linked to this lead. Required for converting leads to opportunities.
Lead Owner	Owner of the lead record. Default value is the record's creator.
Reassign Lead Owner	Indicates that the lead should be reassigned. If your company administrator has set up lead assignment rules, selecting this field triggers assignment manager to process the lead again and assign it according to the rules.  <b>NOTE:</b> The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load. The name of the lead owner changes when the record is reassigned.

Field	Description
Sales Person	Sales person your company assigns to this lead.
Description	Additional information describing the lead. Limit of 2,000 characters.

## Status Field Values

As a lead moves through the lead management process, the lead Status field indicates where it is in the process. Status values are a main way of filtering leads. For more information about the lead management process, see [About Leads](#) (on page 117).

The following table lists the status field's possible values.

Status	Description
Archived	Results from completion of the Archiving steps ( <a href="#">Archiving Leads</a> (on page 126)). Lead is determined to have no value to your company and is removed from the assessment process.
Converted	Results from completion of the Converting steps ( <a href="#">Converting Leads to Accounts, Contacts, or Opportunities</a> (on page 127)). Lead is determined to have enough value to become an opportunity.
Qualified	Results from completion of the Qualifying steps ( <a href="#">Qualifying Leads</a> (on page 125)). Lead has passed the Qualify process. New owner becomes the salesperson assigned to the lead.
Qualifying	Results from completion of the Creating steps ( <a href="#">Qualifying Leads</a> (on page 125)). Lead has been created and is undergoing or about to start the Qualifying process. Owner defaults to the person who created the lead.
Rejected	Results from completion of the Rejecting steps ( <a href="#">Rejecting Leads</a> (on page 129)). Qualified lead is determined not to have as much value as the evaluator originally thought.



# 5 Accounts

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Use the Account pages to create, update, and track accounts. *Accounts* are generally companies that you do business with, but you can also track partners, competitors, affiliates, and so on as accounts.

## About Accounts

*Accounts* are generally companies that you do business with, but you can also track partners and competitors as accounts. The Account pages in Siebel CRM On Demand allow you to create, update, and track accounts.

If account records are central to how your company manages its business, as is the case in many companies, you should enter as much information about accounts as you can. Some of that information, such as Region or Industry, can be used in reports as a way to categorize information. Similarly, if you link a record, such as an opportunity, to an account record with Region or Industry filled in, those opportunities can be categorized by those values.

### Related Topics

Steps for Accounts	138
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## Accounts Homepage

The Accounts Homepage is the starting point for managing accounts. This page contains several sections and displays account information that is relevant to you. If your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

The following are some of the sections that can be displayed on your Accounts Homepage:

## Account Lists Section

The Account Lists section displays this information:

- **Account Lists.** The first ten filtered lists. Filtered lists are subsets or groups of accounts that allow you to limit the number of accounts to work with at a time.

The application comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

If an already-created list does not appear on the Accounts Homepage, click any list. Then, on the Account List page, click the drop-down list to see all the available lists, and make your selection.

The following table describes the standard lists.

This Account List	Displays
All Accounts	All accounts, sorted alphabetically on Account Name
All Customer Accounts	Accounts with Type = Customer
All Prospect Accounts	Accounts with Type = Prospect
All Recently Created Accounts	All accounts, sorted by the created date
All Recently Modified Accounts	All accounts, sorted by the modified date
All Referenceable Accounts	Accounts with Reference check box selected
All Top Accounts	Accounts with Priority=High
My Accounts	Accounts with your name in the Owner field

For information on creating these lists, see [Limiting Account Records Displayed](#) (on page 144).

- **Manage Lists.** This link takes you to the page where you can review all available filtered lists, create a new list, or view, edit, or delete an existing list. The Manage Lists page also includes the standard lists delivered with Siebel CRM On Demand. These lists are view-only; therefore you cannot edit or delete them.

## My Recently Viewed Accounts Section

The My Recently Viewed Accounts section shows this information:

- **My Recently Viewed Accounts list.** List of the ten most recently viewed accounts.
- **Show Full List.** Link for expanding the list of most recently viewed accounts.



## My Open Account-Related Tasks Section

The My Open Account-Related Tasks section shows the open account-related tasks assigned to you, sorted by due date and then priority. It also shows this information:

- **Due Date.** Date task is due as set by you or your manager.
- **Arrow symbol.** Priority for tasks as set by you or your manager. An upward pointing red arrow indicates high priority, a downward pointing green arrow indicates low priority, and no arrow indicates medium priority.
- **Subject.** Title of task. Click the link to review the task.
- **Account.** Account name associated with this task. Click the link to view the Account Detail page.
- **Show Full List.** Link for expanding the list of account-related tasks.

## Account Analysis Section

Your company administrator can change the analysis shown in this section. In the standard application, the Account Analysis section shows a comprehensive account distribution and closed revenue analysis. In this section, you can identify the top performing and underperforming customers, as well as the new market segments.

In this section, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view the same data from another perspective.

## Other Sections

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Accounts Homepage:

- My Recently Created Accounts
- My Recently Modified Accounts
- Recently Created Accounts
- Recently Modified Accounts
- My Current Account Related Tasks
- Account Tasks

### *To add sections to your Accounts Homepage*

- 1 On the Accounts Homepage, click the Edit Layout link.
- 2 On the Account Homepage Layout page, use the directional arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

## Steps for Accounts

Click a topic to see step-by-step procedures to do the following:

- [Creating Accounts](#) (on page 139)
- [Updating Account Information](#) (on page 139)
- [Tracking Contact Roles at an Account](#) (on page 140)
- [Linking Records to Accounts](#) (on page 141)
- [Linking Portfolio Accounts](#) (on page 143)
- [Specifying Parent Accounts](#) (on page 143)
- [Limiting Account Records Displayed](#) (on page 144)
- [Sharing Records \(Teams\)](#) (on page 68)
- [Tracking Partners and Competitors of Accounts](#) (on page 145)
- [Tracking Relationships Between Accounts](#) (on page 146)

**NOTE:** This feature might not be available in your version of the application as it is not part of the standard application.

- [Tracking Assets](#) (on page 147)
- [Tracking Revenue Based on Accounts](#) (on page 148)

**NOTE:** This feature might not be available in your version of the application as it is not part of the standard application.

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

### Related Topics

Account Fields	153
Accounts Homepage	135
Reports	361
Using the Offline Edition	326
Importing Your Data	749

## Creating Accounts

From within Siebel CRM On Demand, you always create an account by entering information in a form. You can access this form from different areas within the application, depending on what you are working on and what you need to do.

This section describes one method for creating an account, which allows you to add the record while continuing with your work in the main area of the application. For a description of all the methods, see [Creating Records](#) (on page 32).

**TIP:** You can indicate account hierarchies, such as a company that is a subsidiary of another company, by selecting parent accounts. For instructions, see [Specifying Parent Accounts](#) (on page 143).

### *To create an account using the Create box*

- 1 From any page, go to the Create box in the left Action bar.
- 2 From the list, click the Account link.
- 3 In the New Account form, enter the required information.
- 4 Save the record.

### Related Topics

Account Fields 153

Accounts Homepage 135

## Updating Account Information

Generally, you can update the information in the account record if you own the record, you manage the owner of the record, or the owner grants you editing access to the record. However, access levels can be adjusted to restrict or expand a user's access.

Depending on the fields you want to edit, you can update account information on the Account List page, the Account Detail page, or the Account Edit page. For more information on updating records, see [Updating Record Details](#) (on page 48).

## Tracking Contact Roles at an Account

Tracking a contact's role or roles at a company is critical to understanding the influence that the contact has on any buying decisions at the account. In addition to specifying a contact's role from the Account Details page, you can define a contact's role for each related account from the contact detail page.

### *To specify one or more roles for an account contact*

- 1 Navigate to the Account Detail page.
- 2 In the Contacts section, select the Contact, and then click the Edit Roles link.  
The Contact Roles Edit page shows the available and selected roles for the account contact.
- 3 In the Available section, choose roles (for example, user, evaluator, approver) for the contact, and use the directional arrow to move the roles to the Selected section.  
Use the up and down arrow to change the order of the roles. The top role in the list is the primary role.
- 4 Click Save.

## Changing an Account Primary Contact

An account can have multiple contacts, but one of the contacts must be specified as the primary contact for the account. By default, the first contact added for the account is the primary contact, but you can change this setting.

**Before you begin.** If the Primary Contact field is not displayed on the Account Detail page, contact your company administrator to have the field added to your page layout.

### *To change an account primary contact*

- 1 Navigate to the Account Detail page.
- 2 Click the Lookup icon on the Primary Contact field.
- 3 In the Search window, select the new primary contact.
- 4 On the Account Detail page, click Save.

## Linking Records to Accounts

You can link the new records you create from the Detail page, such as contacts and activities, to the account record. Linking associates records to each other so that you and others who have access rights to the record get a full view of the information.

New records are added to the database at the same time they are linked to the selected account. For example, a contact you create from the Account Detail page is linked to the account and then appears on the Contacts pages.

An account record contains information that, after linking to another record, is inherited. For example, some opportunity reports display the records by Region or Industry. Since Region and Industry are not part of the opportunity records, the system looks to linked account records to determine which group the opportunity belongs to. Therefore, whenever possible, you want to link records to the account record.

You can also link other users to an account record to allow them to view the record. For example, you might need to share an account record with a team of colleagues you are working with to close a deal. Based on each role, a team member might have different access requirements for the account record, and the contact and opportunity records that are linked to the account.

### *To link information to an account*

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 35).

- 2 On the Account Detail page, scroll down to the appropriate section and link these types of records to the account:

Record Type	Information
Opportunities	To link a new opportunity, click New, enter the required information in the Edit form, and save the record. For field descriptions, see <a href="#">Opportunity Fields</a> (on page 188).
Service Requests	To link a new service request, click New, enter the required information in the Edit form, and save the record. For field descriptions, see <a href="#">Service Request Fields</a> (on page 211).
Notes	<p>To link a new note, click New, enter the required information, and save the record.</p> <p><b>NOTE:</b> You can also add notes by clicking the note icon at the top-right of the page, if this feature is enabled for your company.</p> <p>For more information about notes, see <a href="#">Adding Notes</a> (on page 71).</p>

Record Type	Information
Open Activities	<p>To link a new task or appointment, click New Task or New Appt. Then enter the required information in the Edit form, and save the record. For field descriptions, see <a href="#">Activity Fields</a> (on page 104).</p> <p>You can link several activities to an account. If an activity has a time associated with it, the activity appears in the Activities list and Calendar.</p> <p>Users that have visibility to an account can also see the Activities linked to the account, including those activities owned by or assigned to others.</p>
Contacts	<p>To link a new contact, click New, enter the required information in the Edit form, and save the record. For field descriptions, see <a href="#">Contact Fields</a> (on page 169).</p> <p><b>TIP:</b> To avoid duplicating contact records, you can also click Add, and then click the Lookup icon next to the New Contact column. In the Search for a Contact window, enter the First Name, Last Name, or email address, and click Go. If the application doesn't find the contact, click New to create the contact record.</p> <p>If you know the contact record exists, click Add to link it to this record.</p> <p>To open the Contact Detail page to update information about the contact, click the Name link.</p>
Account Team	<p>To allow this record to be visible to other employees, click Add Users. In the Account Team Add User window, select the employee's name and specify the access level. For more information on sharing records, see <a href="#">Sharing Records (Teams)</a> (on page 68).</p>
Partners	<p>To link an account and track it as your partner with this account, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see <a href="#">Tracking Partners and Competitors of Accounts</a> (on page 145).</p>
Competitors	<p>To link an account and track it as your competitor for this account, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see <a href="#">Tracking Partners and Competitors of Accounts</a> (on page 145).</p>

### *To remove or delete a linked record*

- 1 Select the account.  
For instructions on selecting accounts, see [Finding Records](#) (on page 35).
- 2 On the Account Detail page, scroll down to the appropriate section.

**3** In the row whose link you want to remove or delete, click one of these links:

- **Remove.** This disassociates the records without deleting either record.
- **Del.** This deletes the linked record. A deleted record is moved to the Deleted Items page and is permanently removed from the database after 30 days.

#### Related Topics

Account Detail Page	153
Attaching Files and URLs to Records	74
Deleting and Restoring Records	79
Tracking Assets	147

## Linking Portfolio Accounts

This feature is specific to the CRM On Demand Financial Services Edition.

You can link portfolio accounts to an account with a many-to-one relationship. In other words, you can link many portfolio accounts to one account, but each portfolio account can be linked to only one account.

**Before you begin.** The Portfolio related information is not shown on the Account Details page by default. To allow you to see this information, your company administrator must grant access to the Portfolio related information to your role. You or your company administrator must then add the Portfolio related information to your Account Details page layout. For more information on customizing your Detail page layouts, see [Changing Your Detail Page Layout](#) (on page 317).

### *To link a portfolio subaccount*

- 1** Select the parent account.  
For more information on selecting accounts, see [Finding Records](#) (on page 35).
- 2** On the Account Details page, scroll to the Portfolio related information, and click New.
- 3** Complete the fields in the Portfolio Account Edit page that is launched.
- 4** Save the record.

## Specifying Parent Accounts

You can indicate account hierarchies, such as a company that is a subsidiary of another company, by specifying a parent-child relationship. First create the parent account and then select that account as the parent for the child or subaccount.

### *To specify the parent account*

- 1 Select the child account.  
For instructions on selecting accounts, see [Finding Records](#) (on page 35).
- 2 On the Account Edit page, click the Lookup icon next to the Parent Account field.
- 3 In the Search window, select the parent account.
- 4 Save the record.

#### **Related Topics**

[Finding Records](#) 35

[Account Fields](#) 153

## Limiting Account Records Displayed

You can limit the accounts you see by selecting a filtered list. A list shows a subset of the accounts that meet the criteria saved with the list.

### **Before you begin:**

- When you create a list, you need to enter the fields and values for the criteria you set up. You might want to go to the Account Edit page and write down the exact field names and values as they are used in your application. Otherwise, your filtered list may not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names; however, the printout does not capture the field values for drop-down lists.
- If you are using the Offline edition of Siebel CRM On Demand, the number of records that you can download at a time is restricted. By default, the Offline edition of CRM On Demand restricts you to downloading 250 accounts at a time. Your company administrator can request an increase in this number. However, increasing the number could increase the amount of time it takes to complete the download process. If your account records exceed the maximum you are allowed to download, create filtered lists that divide your accounts into smaller amounts, such as accounts based on different Priority values, or on location. Then, during the download process, select the filtered lists you have created to make sure all your account records are copied to your laptop or desktop.

### *To open a filtered list for accounts*

- 1 Click the Accounts tab.
- 2 From the Account Lists section on the Account Homepage, select the list you want to work with.

For a description of default account filtered lists, see [Accounts Homepage](#) (on page 135).



***To create a filtered list for accounts***

- 1 Click the Accounts tab.
- 2 From the Account Lists section on the Account Homepage, click the Manage Lists link.
- 3 On the Manage Lists page, click the New List button.
- 4 Complete the steps described in [Creating and Refining Lists](#) (on page 59).

**Related Topics**

Account Fields	153
Account List Page	151
Accounts Homepage	135

## Tracking Partners and Competitors of Accounts

Siebel CRM On Demand provides areas in the application where you can track information on either partners or competitors for your accounts. For example, you might want to track which companies (accounts) you do business with for Account XYZ or which companies (accounts) you compete with for Account XYZ.

To do so, first link the account acting as your partner or competitor to the account record. Then add information to the Account Partner Edit or Account Competitor Edit page about the partner or competitor, such as its strengths and weaknesses.

**NOTE:** You can link as many partner or competitor accounts as you want. However, you cannot link an account record to itself as a partner or competitor. For example, Company ABC cannot be linked to Company ABC, unless there are two separate records for the company within the database.

**Before you begin.** Create an account record for each partner or competitor you want to link to the account. When creating that record, you can select Partner or Competitor as the Account Type. For instructions on adding records, see [Creating Accounts](#) (on page 139).

***To track partner and competitor information for accounts***

- 1 Select the account.  
For instructions on selecting accounts, see [Finding Records](#) (on page 35).
- 2 On the Account Detail page, scroll down to the Competitor or Partner section and do one of the following:
  - To link an account, click Add.
  - To update information, click the Edit link next to the existing partner or competitor.

- 3 On the Account Competitor Edit or Account Partner Edit page, enter the required information.

The following table describes some field information for tracking partner or competitor information.

Field	Comments
Partner	Click the Lookup icon, and select the account whose relationship and information you want to track as your partner when dealing with this account.
Competitor	Click the Lookup icon, and select the account whose relationship and information you want to track as your competitor for this account.
Is a	Select an option that defines the relationship between the accounts. In the second line, select the option that defines the reverse relationship or role.  Default values are Customer, Partner, System Integrator, Vendor, and Reseller. Your company administrator can change or add values to the drop-down list.
Start Date	Default is today's date. You can use this field to record the start date of a partnership.
End Date	You can use this field to record the expiration date of a partnership.

- 4 Save the record.

## Tracking Relationships Between Accounts

**Before you begin.** This feature is specific to the CRM On Demand Financial Services Edition.

When you want to track relationships between accounts, store the information in the Account Relationship pages. For example, you might want to track investor or affiliate relationships for this account.

To do so, first link the account whose relationship you want to track to this account record. (You can link as many accounts as you want.) Then define the relationship and add any other pertinent information.

**Before you begin.** Create an account record for each organization you want to link to the account. This feature might not be available in your version of the application.

### *To track relationships between accounts*

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 35).

- 2 On the Account Detail page, scroll down to the Account Relationships section and do one of the following:
  - To link an account, click Add.
  - To update information, click the Edit link in the row for the existing account relationship.
- 3 On the Account Relationship Edit page, enter the required information.
 

You need to select options that describe the relationship between this account and the related account. In the second line, select the option that defines the reverse relationship or role.

For example, after selecting options from the drop-down lists, the Key Relationship Information might read:

Account XYZ is a Partner of Account ABC. Account ABC is a Vendor for Account XYZ.
- 4 Save the record.

## Tracking Assets

When you want to track a product you've sold to a customer or company, link the product record to the account as an asset.

- 1 Select the account.
 

For instructions on selecting accounts, see [Finding Records](#) (on page 35).
- 2 On the Account Detail page, scroll down to the Asset section and do one of the following:
  - To link an asset, click Add.
  - To update asset information, click the Edit link next to the existing asset.
- 3 On the Asset Edit page, enter the required information.

**NOTE:** If you are using an industry-specific version of Siebel CRM On Demand, assets may be listed under different headings. For example, in the CRM On Demand Automotive Edition, assets are listed as Vehicles.

The following table describes some field information for tracking asset information. If you are using an industry-specific version of Siebel CRM On Demand, you might see additional fields.

Field	Description
<b>Key Asset Information</b>	
Product Name	Product supplied to the customer. When you link the product record, these fields are copied from the product definition: Product Category, Part #, Type, and Status.

Field	Description
Purchase Price	Price paid for the product.
Quantity	Number of units the customer purchased.
Ship Date	Defaults to today's date.
Product Category	Read-only. Copied from the product definition.
Part Number	Read-only. Copied from the product definition.
Type	Read-only. Copied from the product definition.
Operating Status	Default values are Inactive, Active, Idle, Up, Limited Use, Maintenance, Down, Critical Down.
Warranty	Time period of the warranty.
Contract	Type of contract, such as Bronze, Gold, Platinum, or Silver.
Asset Currency	Currency corresponding to the Purchase Price. You can select another currency to convert the price to another currency, if your company administrator set that feature up.
Notify Date	<p>Date that appears in the task record.</p> <p>If you enter a Notify Date on the asset record, a task is created when you save this asset record. The task appears as "Asset <i>Name</i> requires follow-up" on My Homepage, Account Homepage, and Calendar.</p> <p><b>TIP:</b> Set the date to give you time for follow-up tasks regarding this asset, such as notification that a contract or warranty is about to expire.</p> <p><b>NOTE:</b> The automatic creation of a task feature is only activated when you enter a notify date on an asset record, not on a contact record.</p>
<b>Additional Information</b>	
Description	Additional information about the asset. Limit of 250 characters.

## Tracking Revenue Based on Accounts

**Before you begin.** This feature is specific to the CRM On Demand Financial Services Edition.

You can track revenue information for each of your accounts, which allows your company to base its forecasts on account revenue. To do so, you add revenue records to accounts.

Adding revenue records to accounts allows you to:

- Track products, product categories, or revenues forecasted for each account
- Base your company's forecasts on account revenue

If your company bases its forecasts on accounts, only records meeting these criteria are included in the forecast:

- Revenue record for the account must have a Status of Open, Pending, or Closed.
- Revenue record for the account must have the Forecast field checked.
- Revenue record cannot be linked to an opportunity.

**Before you begin.** Your company needs to inform you of the forecasting method that it wants to use. Companies can forecast revenue on any one of the following: opportunity, opportunity product, account, or contact revenue. The company forecasting method determines which fields you need to fill in when adding revenue records to accounts.

### *To add revenue to accounts*

- 1 Select the account.

For instructions on selecting accounts, see [Finding Records](#) (on page 35).

- 2 On the Account Detail page, scroll down to the Revenues section and do one of the following:

- To add a revenue record, click Add.
- To update revenue information, click the Edit link next to the existing revenue record.

- 3 On the Revenue Edit page, complete the Revenue Fields.

**NOTE:** If your company does not use account revenue for its forecasts, it is best to leave the Forecast check box blank on the Revenue page.

- 4 Save the record.

## Revenue Fields

The following table describes field information for revenue. Your administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

**NOTE:** Account and Contact Revenue forecasting require that Revenues be enabled for both Accounts and Contacts. This functionality must be set up for your company. For more information, contact Customer Care.

**CAUTION:** If your company bases its forecasts on account or contact revenue, the information that you enter for revenue can affect its calculations.

Field	Description
<b>Key Product Information</b>	
Date	<p>For an account or contact, the expected revenue close date. For recurring revenue, the start date. For recurring revenue with a close date that ends on the last day of the month and a start date of mid-month, add one record for the full recurring price and another record for the prorated order.</p> <p>For example: You start supplying disposables to a company or client on May 15th. After that, you will be sending \$500 worth of disposables at the end of each month through the end of the year.</p> <p>For the mid-month order, add a record with these values:  Revenue = \$250  Quantity = 1</p> <p>For the recurring order, add a second record with these values:  Revenue = \$500  Quantity = 1  Frequency = Monthly  #of Periods = 7 (June through December).</p>
Product Name	Only products marked Orderable by your company administrator can be selected.
Product Category	Category of the product.
Part #	Number carried over with the product definition. Read-only.
Forecast	Indicator to include this product in forecasting totals.
Type	<p>Default values are Actual, Shipped, Billed, Booked, Projected, and Quota.</p> <p><b>NOTE:</b> The Type you set applies to the revenue record. Another Type field (read-only field), which is populated with the product information, might also appear on this page.</p>
Status	<p>If your company calculates forecasts on accounts or contacts, you must set the Status to Open, Pending, or Closed for this record to be included in the forecasts.</p> <p><b>NOTE:</b> The Status you set applies to the revenue record. Another Status field (read-only field), which is populated with the product information, might also appear on this page.</p>
Quantity	Number of units the customer orders. For a recurring product, enter the quantity of the product per recurring period. For example, if you send 10 printer cartridges each month, enter 10 here.
Price	Product price.

Field	Description
Revenue	Quantity multiplied by Price. The revenue cannot be overwritten. If the Forecast check box is selected, this revenue amount contributes to your company's forecast totals.  <b>TIP:</b> To forecast a specific revenue value, independent of the product or product category, set the quantity to 1 and the price equal to the revenue value.
Description	Additional information about the product. Limit of 2,000 characters.
<b>Recurring Revenue Information</b>	
Frequency	Frequency for a recurring product. Bi-weekly means twice a week.
# of Periods	Number of periods for a recurring product.
<b>Additional Information</b>	
Owner	Person assigned to this revenue record. Generally, the owner can update record details or delete the record. However, access levels can be adjusted to restrict or expand a user's access.  This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).  Each record has only one owner. However, account, contact, and opportunity records can be shared with other employees. For instructions, see <a href="#">Sharing Records (Teams)</a> (on page 68).

## Account List Page

The Account List page shows the subset or list of accounts you selected in the Accounts Homepage. From the Account List Page, you can review multiple accounts at a glance. You can edit fields inline on the Account List page. You can also select an account to review, update, or delete. For more information on updating records, see [Updating Record Details](#) (on page 48).

Using the drop-down menu, you can also switch to another account list. The drop-down list contains both standard lists distributed with the application and custom lists for your company.

The following table describes what you can do from the Account List Page.

To do this	Follow these steps
Add accounts to books or remove accounts from books	On the Account List title bar, click Menu, and select Batch Assign book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Create a new list of accounts	On the Account List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).

To do this	Follow these steps
Create an account	On the Account List title bar, click New Account. On the Account Edit page, enter the required information and save the record.
Delete all records from the list	On the Account List title bar, click Menu, and select Batch Delete. Complete the steps described in <a href="#">Deleting and Restoring Records</a> (on page 79).
Export the list	On the Account List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find an account	Click the Account Name column header. Then click a letter in the alphabet bar. For accounts beginning with numbers, click 0-9.
Manage all the account lists	On the Account List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Account List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more/fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Account List title bar, click Menu, and select Show List Filter. See <a href="#">View List Page</a> (on page 65) for an explanation of the information.
Update a group of account records at once	On the Account List title bar, click Menu, and select Mass Update. Complete the steps described in <a href="#">Updating Groups of Records</a> (on page 69).
View a different subset of accounts	On the Account List title bar, click the drop-down list and change the selection. The drop-down list contains all filtered lists available to you, arranged alphabetically.
View account details	Click the account in the Account Name column. This opens the Account Detail page.
View all accounts at your company	On the Accounts List title bar, click the drop-down list and select All Accounts.

### Related Topics

Account Fields 153

About Accounts 135

Limiting Account Records Displayed 144



## Account Detail Page

Click a topic to see instructions for doing the following from the Account Detail page:

- [Updating Record Details](#) (on page 48)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Sharing Records \(Teams\)](#) (on page 68)
- [Tracking Partners and Competitors of Accounts](#) (on page 145)
- [Tracking Relationships Between Accounts](#) (on page 146)
- [Tracking Assets](#) (on page 147)
- [Tracking Revenue Based on Accounts](#) (on page 148)
- [Adding Notes](#) (on page 71)
- [Attaching Files and URLs to Records](#) (on page 74)
- [Changing Your Detail Page Layout](#) (on page 317)

**NOTE:** Not all these features might be set up in your edition of Siebel CRM On Demand.

### Related Topics

[Account Fields](#) 153

[About Accounts](#) 135

## Account Fields

Use the Account Edit page to add an account or update details for an existing account. The Account Edit page shows the complete set of fields for an account.

**TIP:** You can also edit accounts on the [Account List](#) page and the Account Detail page. For more information on updating records, see [Updating Record Details](#) (on page 48).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

Account records are central to how you manage and view your data. As a result, you should enter as much information about accounts as you can. Some of that information, such as Region or Industry, can be used in reports as a way to categorize information. Similarly, if you link a record, such as an opportunity, to an account record with Region or Industry filled in, those opportunities can be categorized by those values.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Account Information</b>	
Account Name	Name of the account. To avoid duplicate records, make sure you follow the naming conventions your company has set up for abbreviations, capitalization, and so on.
Location	Type of facility operated by the account at this site, such as Headquarters.
Parent Account	Company that the account is a subsidiary of.
Web Site	URL address for the account.
<b>Account Sales Information</b>	
Account Type	<p>Relationship of the account to your company, such as Prospect, Customer, Partner, Competitor.</p> <p><b>Note:</b> Accounts designated as a Partner or Competitor appear under the All Competitor and All Partner Accounts lists available from the Accounts Homepage.</p> <p>They are also included in the list of accounts you can link to other accounts or opportunities from the Account or Opportunity Detail page. At that point, you can define the exact role that the account plays, such as Reseller, Vendor, or Partner, and track the partner and competitor information for every account and opportunity.</p>
Priority	Priority for the account, such as High, Medium, or Low.
Industry	<p>Type of business engaged in by the account, such as Manufacturing, High Technology, Financial Services, Retail, Automotive, Pharmaceuticals, Telecommunications, Energy, Services, or Other.</p> <p>If you want to view report information, such as opportunities, by Industry, select an Industry for the account and then link the opportunity record to the account.</p>
Public Company	Indication that the account is a publicly-owned company.
Region	Region the account falls under at your company. If you want to view report information, such as opportunities, by Regions, select a Region for the account and then link the opportunity record to the account.
Status	Specific to Siebel CRM On Demand Life Science Edition.
Last Call Date	Specific to Siebel CRM On Demand Life Science Edition.
HIN	Health Industry Number. Specific to Siebel CRM On Demand Life Science Edition.
Influence Type	Specific to Siebel CRM On Demand Life Science Edition.
Call Frequency	Specific to Siebel CRM On Demand Life Science Edition.
Source Campaign	The campaign that generated the account. This field is automatically populated during the lead conversion process or specified by the user when a new account is created.

Field	Description
Annual Revenues	Amount of the company's annual revenue.
Market Segment	Specific to Siebel CRM On Demand Life Science Edition.
Market Potential	Specific to Siebel CRM On Demand Life Science Edition.
YTD Revenue	Specific to Siebel CRM On Demand Life Science Edition.
Market Share	Specific to Siebel CRM On Demand Life Science Edition.
Reference	Indication that the account can be used as a reference for potential customers or sales representatives to contact.
Reference as of	Date the account becomes a reference.
Partner	Indication that this account is a partner.
Number of Physicians	Number of physicians working at a health care site, such as a hospital or clinic. Specific to Siebel CRM On Demand Life Science Edition.
Route	Specific to Siebel CRM On Demand Life Science Edition.
<b>Additional Information</b>	
Billing and Shipping Addresses	<p>Selecting a country determines the labels for the remaining address fields, according to that country's address convention. You might see the screen refresh to adjust the field names.</p> <p>If you add a contact and link it to this account, the Billing address for the account is carried over to the Account address section for that contact.</p>
Owner	<p>Alias of the record owner. Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access. In order to reassign ownership of an account, you must have Read/Edit/Delete access to the account.</p> <p><b>NOTE:</b> If group ownership is enabled for your company, the group team members will automatically change if the new owner is a member of a different group.</p> <p>The value in the Owner field affects which records are included in the reports that you or your managers run.</p> <p>Each record has only one owner. However, account records can be shared with other employees through the Account Team page. For more information, see <a href="#">Sharing Records (Teams)</a> (on page 68).</p>

Field	Description
Reassign Account	<p>Indicates that the account should be reassigned. If your company administrator has set up account assignment rules, selecting this field triggers assignment manager to process the account again and assign it according to the rules.</p> <p><b>NOTE:</b> The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and the current system load. In the case of accounts, the processing time is also affected by the number of team members and the number of contacts and opportunities associated with the record. The owner name changes when the record is reassigned.</p>
Territory	Territory that this account belongs to.
Modified By	Name of the person who created or last updated the account record, followed by the date and time of the update. System-generated.
Description	Additional information about the account. Limit of 2,000 characters.

### Related Topics

Steps for Accounts	138
Account Detail Page	153

# 6

## Contacts

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Use the Contact pages to create, update, and track contacts. *Contacts* are individuals that your company currently conducts business with or expects to conduct business with in the future. These individuals can be employees of other companies, independent consultants, vendors, or personal acquaintances. A contact is generally associated with an account, and often, an account record includes links to information about several different contacts at that company.

### Contacts Homepage

The Contacts Homepage is the starting point for managing contacts. This page contains several sections and displays contact information that is relevant to you. If your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

The following are some of the sections that can be displayed on your Contacts Homepage.

#### Contact Lists Section

The Contact Lists section shows this information:

- **Contact Lists.** Filtered lists are subsets or groups of contacts that allow you to limit the number of contacts to work with at a time. The first 10 filtered lists are shown.

The application comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

If an already-created list does not appear on the Contacts Homepage, click any list. Then, on the Contact List page, click the drop-down list to see all the available lists, and make your selection.

The following table describes the standard lists.

Contact List	Filters
All Contacts	none (displays all records to which you have visibility, regardless of owner)
All Customer Contacts	Type = Customer
All Recently Created Contacts	All contacts, sorted by the created date
All Recently Modified Contacts	All contacts, sorted by the modified date
My Contacts	Contacts with your name in the Owner field

For information on creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** This link takes you to the page where you can review all available filtered lists, create a new list, or view, edit, or delete an existing list. The Manage Lists page also includes the standard lists delivered with CRM On Demand. These lists are view-only; therefore you cannot edit or delete them.

### My Recently Viewed Contacts Section

The My Recently Viewed Contacts section shows this information:

- **My Recently Viewed Contacts list.** List of the ten most recently viewed contacts.
- **Show Full List.** Link for expanding the list of recently viewed contacts.

### My Open Contact Related Tasks Section

The My Open Contact Related Tasks section shows the open tasks assigned to you, sorted by due date and then priority. It also shows this information:

- **Due Date.** Date task is due as set by you or your manager.
- **Arrow symbol.** Priority for tasks as set by you or your manager. An upward pointing red arrow indicates high priority, a downward pointing green arrow indicates low priority, and no arrow indicates medium priority.
- **Subject.** Title of task. Click the link to review the task.
- **Primary Contact.** The primary contact record associated with the task.
- **Show Full List.** Link for expanding the list of contact-related tasks.

### Contact Analysis by Account Section

Your company administrator can change the analysis shown in this section. In the standard application, the Contact Analysis by Account section shows a chart that allows users to analyze their total number of contacts by Account criteria, such as Region, State/Province, or Industry. From this information, users can maintain a thorough understanding of their contact distribution as well as identify areas of opportunity or weakness.

In this section, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down list to view the same data from another perspective.

## Other Sections

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Contacts Homepage:

- [My Recently Created Contacts](#)
- [My Recently Modified Contacts](#)
- [Recently Created Contacts](#)
- [Recently Modified Contacts](#)
- [My Current Contact Related Tasks](#)
- [Contact Tasks](#)

### *To add sections to your Contacts Homepage*

- 1 On the Contacts Homepage, click the Edit Layout link.
- 2 On the Contact Homepage Layout page, use the directional arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

## Steps for Contacts

Click a topic to see step-by-step procedures to do the following:

- [Importing Your Contacts](#) (on page 160)
- [Creating Records](#) (on page 32)
- [Updating Record Details](#) (on page 48)
- [Sharing Records \(Teams\)](#) (on page 68)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Working with Lists](#) (on page 56)
- [Linking Contacts to Multiple Accounts](#) (on page 164)
- [Tracking Relationships Between Contacts](#) (on page 165)

■ [Tracking Revenue Based on Contacts](#) (on page 165)

**NOTE:** This feature is not part of the standard application, so it might not be available in your version of the application.

■ [Adding Referrals](#) (on page 166)

**NOTE:** This feature is not part of the standard application, so it might not be available in your version of the application.

■ [Tracking Contact Interests](#) (on page 167)

**NOTE:** This feature is not part of the standard application, so it might not be available in your version of the application.

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Importing Your Contacts

As a non-administrator, you can import up to 2,000 contacts at a time from a comma-separated value (.csv) file to use with Siebel CRM On Demand. When you import contacts, you specify how you want the application to handle duplicate records.

**NOTE:** Administrators can import up to 30,000 contact records, with a maximum file size of 9 MB, at a time.

**Before you begin.** If several employees at your company are importing contacts, coordinate the importing effort to minimize record duplication. Also, prepare your file for importing to make sure you capture all the data in the file.

**CAUTION:** You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5-10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on data importing or contact Customer Care. For information on those resources, click the Training and Support link at the top of each page within Siebel CRM On Demand.



**To import your contacts**

**1** Click the Contacts tab.

**2** In the Recently Modified Contacts title bar, click the Import button.

**NOTE:** If the Recently Modified Contacts section is not visible on your Contacts Homepage, click the Edit Layout link in the upper right corner of the page, and add the Recently Modified Contacts section to your page layout.

**3** On the Data and Integration Tools page, click the Import Your Contacts link.

This starts the Import wizard.

**4** For Step 1:

**a** Select how you want the Import wizard to identify matching records.

The Import wizard uses an external unique ID, which is a unique external ID field that is imported from another system. The Import Wizard also uses CRM On Demand pre-defined fields. These are non-ID fields, such as Account Name and Location.

For information on how duplicate records are defined, see [About Record Duplicates and External IDs](#) (on page 755).

**b** Select what you want the Import wizard to do if it finds a duplicate unique record identifier in CRM On Demand. Your choices are: not to import duplicate records, to overwrite existing records, or to create additional records.

**c** Select the action you want the Import Wizard to follow if the imported record's unique record identifier does not match an existing record in CRM On Demand.

**NOTE:** If you select Overwrite Records and Don't Create New Record in the previous option, this results in the record being updated.

**d** Select how you want to handle picklist values in your CSV file that do not match the values in the application.

The Import wizard can either add the new value to the picklist or will not import the field value.

**NOTE:** This is not available if the user's language is different than the company's default language.

**e** Decide if the Import Wizard should create a new record for missing associations (related records) in your data file.

**f** Select the date/time format used in the CSV file.

For more information, see [Field Type Guidelines for Importing Data](#) (on page 674).

- g** Verify that the file encoding selection is Western.

**NOTE:** You should not change this unless you are certain another encoding method is used. The default, Western, applies to most encoding systems in Europe and North America.

- h** Select the type of CSV delimiter used in your file: comma or semi-colon.

- i** Select the CSV file whose data you want to import.

**5** For Step 2:

- a** Follow the instructions for validating your file, if necessary.

- b** Select a field mapping file, if available.

Field mapping files (.map) contain the pairing of fields in your CSV file with existing Siebel CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.

**6** For Step 3:

- a** Map the fields in your file to Siebel CRM On Demand fields. At a minimum, you need to map all required fields to column headers in the CSV file.

- The Import Assistant lists the column headers from your import CSV file next to a drop-down list showing all the fields in that area in Siebel CRM On Demand, including custom fields you added.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code

To filter your list on this field	Select this field from the drop-down list
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

- If you selected a .map file, verify that the fields map correctly. Custom fields created since you ran the previous import might need to be mapped.
- For information about external IDs, see [About Record Duplicates and External IDs](#) (on page 755).

**CAUTION:** If you have selected the wrong file to import, click **Cancel** to change selections. At this point, using the **Back** button does not clear the cache, so the import file you originally selected appears in the field mapping step.

**CAUTION:** External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

- 7 For Step 4, follow the onscreen instructions, if necessary.
- 8 For Step 5, click **Finish**.

### *To view the queue for your import requests*

- 1 Click the **Contacts** tab.
- 2 In the **Recently Modified Contacts** title bar, click the **Import** button.
- 3 On the **Data and Integration Tools** page, click the **Import Request Queue** link.

The **Import Request Queue** page appears with information about your requests, including the estimated time of completion.

The following table describes the import status.

Status	Description
Completed	The import completed with no errors during import.
Completed with errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every 20 seconds, or as set by a system process.
# Successfully Imported	The number of records that were imported without any problems.
# Partially Imported	The number of records that were imported. Not all records were imported.
# Not imported	The number of records that were not imported at all.

## Linking Contacts to Multiple Accounts

You can link a contact to more than one account. To do this, your role and your setup must be configured as follows:

- Your company administrator must include the Manage Extended Contact and Account Relationship Access privilege in your user role.
- Your Contact Detail Page layout must include the Accounts related information. For information about changing your page layout, see [Changing Your Detail Page Layout](#) (on page 317).

For more information about linking records, see [Linking Records to Your Selected Record](#) (on page 49).

## Tracking Relationships Between Contacts

**Before you begin.** This feature might not be available in your version of the application because it is not part of the standard application.

When you want to track relationships between contacts, store the information in the Contact Relationship pages. For example, you might want to track influential relationships, such as personal relationships, business relationships, and industry peers for this contact.

To do so, first link the contact whose relationship you want to track to this contact record. (You can link as many contacts as you want.) Then define the relationship and add any other pertinent information.

**Before you begin.** Create a contact record for each person you want to link to the contact.

### *To track relationships between contacts*

- 1 Select the contact.

For instructions on selecting contacts, see [Finding Records](#) (on page 35).

- 2 On the Contact Detail page, scroll down to the Contact Relationships section and do one of the following:

- To link a contact, click Add.
- To update information, click the Edit link in the row for the existing contact relationship.

- 3 On the Contact Relationship Edit page, enter the required information.

You need to select options that describe the relationship between this contact and the related contact. In the second line, select the option that defines the reverse relationship or role.

For example, after selecting options from the drop-down lists, the Key Relationship Information might read:

Contact XYZ is a Subordinate of Contact ABC. Contact ABC is a Superior for Contact XYZ.

## Tracking Revenue Based on Contacts

**Before you begin.** This feature might not be available in your version of the application as it is not part of the standard application.

You can track revenue information for each of your contacts, which allows your company to base its forecasts on contact revenue. To do so, you add revenue records to contacts.

Adding revenue records to contacts allows you to:

- Track products, product categories, or revenues forecasted for each contact
- Base your company's forecasts on contact revenue

If your company bases its forecasts on contacts, only records meeting these criteria are included in the forecast:

- Revenue record for the contact must have a Status of Open, Pending, or Closed.
- Revenue record for the contact must have the Forecast field checked.
- Revenue record cannot be linked to an opportunity.

**Before you begin.** Your company needs to inform you of the forecasting method that it wants to use. Companies can forecast revenue on opportunity, opportunity product, account, or contact revenue, but only on one of those. The company forecasting method determines which fields you need to fill in when adding revenue records to contacts.

### *To add revenue to contacts*

- 1 Select the contact.

For instructions on selecting contacts, see [Finding Records \(on page 35\)](#).

- 2 On the Contact Detail page, scroll down to the Revenues section and do one of the following:

- To link a revenue record, click Add.
- To update revenue information, click the Edit link next to the existing revenue record.

- 3 On the Revenue Edit page, complete the Revenue Fields, see [Tracking Revenue Based on Accounts \(on page 148\)](#).

**NOTE:** If your company does not use contact revenue for its forecasts, it is best to leave the Forecast check box blank on the Revenue page.

- 4 Save the record.

## Adding Referrals

**Before you begin.** This feature might not be available in your version of the application since it is not part of the standard application.

You can add referrals to your contact record. When you create a new referral, the record is saved as a new lead record.

### *To add a referral*

- 1 Select the contact.  
For instructions on selecting contacts, see [Finding Records](#) (on page 35).
- 2 On the Contact Detail page, scroll down to the Referral section and click New.
- 3 On the Referral Edit page, enter the required information.
- 4 Save the record.  
The new referral shows a status of Qualifying by default.

## Tracking Contact Interests

**Before you begin.** This feature might not be available in your version of the application because it is not part of the standard application.

You can track products, services, or hobbies a contact is interested in, such as mutual funds or golf.

### *To track contact interests*

- 1 Select the contact.  
For instructions on selecting contacts, see [Finding Records](#) (on page 35).
- 2 On the Contact Detail page, scroll down to the Contact Interests section and click Add.
- 3 On the Contact Interests page, fill in the required information.
- 4 Save the record.

## Contact List Page

The Contact List page shows the subset or list of contacts you selected in the Contacts Homepage. From the Contact List Page, you can review multiple contacts at a glance. You can edit fields inline on the Contact List page. You can also select a contact to review, update, or delete. For more information on updating records, see [Updating Record Details](#) (on page 48).

Using the drop-down menu, you can also switch to another contact list. The drop-down list contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table Contact Lists Section table in [Contacts Homepage](#) (on page 157).

The following table describes what you can do from the Contact List page.

**NOTE:** If you access the Contact List page through a record Detail page, some of these features are not available.

To do this	Follow these steps
Add contacts to books or remove contacts from books	On the Contact List title bar, click Menu, and select Batch Assign book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Create a contact	On the Contact List title bar, click New Contact. On the Contact Edit page, enter the required information and save the record.
Create a new list of contacts	On the Contact List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Delete all records from the list	On the Contact List title bar, click Menu, and select Batch Delete. Complete the steps described in <a href="#">Deleting and Restoring Records</a> (on page 79).
Export the list	On the Contact List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a contact	Click the Last Name column header to sort the data. Then click a letter in the alphabet bar. For contacts beginning with numbers, click 0-9.
Manage all the contact lists	On the Contact List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Contact List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more/fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Contact List title bar, click Menu, and select Show List Filter. See <a href="#">View List Page</a> (on page 65) for an explanation of the information.
Update a group of contact records at once	On the Contact List title bar, click Menu, and select Mass Update. Complete the steps described in <a href="#">Updating Groups of Records</a> (on page 69).
View a subset of contacts	On the Contact List title bar, click the drop-down list and change the selection.
View all contacts	Click the All link on the alphabet bar.



## Contact Fields

Use the Contact Edit page to add a contact or update details for an existing contact. The Contact Edit page shows the complete set of fields for a contact.

**TIP:** You can also edit contact information on the Contact List page and the Contact Detail page. For more information on updating records, see [Updating Record Details](#) (on page 48).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Contact Information</b>	
Account	Account the contact is linked to.  <b>NOTE:</b> It is possible to link a contact to more than one account; see <a href="#">Linking Contacts to Multiple Accounts</a> (on page 164) for more information.
Opt In	Used in the U.S. and Europe to indicate that a customer has explicitly chosen to participate in either their information sharing or marketing communications.
Opt Out	Used in the U.S. and Europe to indicate that a customer has explicitly chosen <i>not</i> to allow their information to be shared or has chosen not to receive marketing communications.
<b>Contact Detail Information</b>	
Contact Type	Contact's type, such as Prospect, Qualified Lead, Customer, Partner, and Competitor.
Department	Name of the department of the contact.
Manager	Name of the manager of the contact.
Lead Source	Lead source of the contact, such as Advertising, Billboard, Direct Mail, Event, Promotion, Referral, Tradeshow, Web, and Other.
Source Campaign	The campaign that generated the contact. This field is automatically populated during the lead conversion process or specified by the user when a new contact is created.
Assistant Name	Name of the contact's assistant.
Assistant Phone #	Phone number of the contact's assistant.
Private	Indicates that the contact is private and cannot be viewed by other users.

Field	Description
Never Email	Indicates that the contact does not want to receive email.
Degree	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN, and Master of Public Health. Specific to Siebel CRM On Demand Life Science Edition.
Market Potential	Default values are High, Medium, and Low. Specific to Siebel CRM On Demand Life Science Edition.
Call Frequency	Default values are No See, 1-2 Times/Year, 3-4 Times/Year, and >5 Time/Year. Specific to Siebel CRM On Demand Life Science Edition.
YTD Sales	Specific to Siebel CRM On Demand Life Science Edition.
Route	Default values are Route 1, Route 2, Route 3, and Route 4. Specific to Siebel CRM On Demand Life Science Edition.
Last Call Date	Specific to Siebel CRM On Demand Life Science Edition.
Best Time to Call	Indicates the best time of day to reach a contact. Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning, and Saturday. Specific to Siebel CRM On Demand Life Science Edition.
<b>Additional Information</b>	
Account Address	Primary address. Inherited from the account linked to the contact. Read only.
Contact Address	Alternate address of the contact.
Owner	<p>Alias of the record owner. Generally, the owner can update record details, transfer a record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p> <p>Each record has only one owner. However, contact records can be shared with other users through Contact Team or Account Team pages. For instructions, see <a href="#">Sharing Records (Teams)</a> (on page 68).</p>
Modified By	Name of the person who created or last updated the contact record, followed by the date and time of the update.
Description	Additional information about the contact. Limit of 2,000 characters.

Field	Description
<b>Available Section</b>	
Current Investment Mix	Default values are Aggressive, Moderate, and Conservative. Specific to Siebel CRM On Demand Financial Services Edition.
Objective	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth, and International Diversification. Specific to Siebel CRM On Demand Financial Services Edition.
Segment	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth. Specific to Siebel CRM On Demand Financial Services Edition.
Experience Level	Default values are None, Limited, Good, and Extensive. Specific to Siebel CRM On Demand Financial Services Edition.
Risk Profile	Default values are Conservative, Moderate, Aggressive. Specific to Siebel CRM On Demand Financial Services Edition.
Primary Goal	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets, and Retirement. Specific to Siebel CRM On Demand Financial Services Edition.
Life Event	Default values are Marriage, Birth of Child, Retirement, Divorce, and Other. Specific to Siebel CRM On Demand Financial Services Edition.
Investment Horizon	Default values are Short term, Medium term, and Long term. Specific to Siebel CRM On Demand Financial Services Edition.
Tier	Default values are Gold, Silver, Bronze, Top 100, Top, Medium, and Low. Specific to Siebel CRM On Demand Financial Services Edition.
Total Liabilities	Specific to Siebel CRM On Demand Financial Services Edition.
Total Net Worth	Specific to Siebel CRM On Demand Financial Services Edition.
Total Income	Specific to Siebel CRM On Demand Financial Services Edition.
Total Assets	Specific to Siebel CRM On Demand Financial Services Edition.
Total Expenses	Specific to Siebel CRM On Demand Financial Services Edition.
Credit Score	Specific to Siebel CRM On Demand Financial Services Edition.
Marital Status	Default values are Single, Divorced, Married, Partner, Separated, Widowed, and Widower. Specific to Siebel CRM On Demand Financial Services Edition.
Own or Rent	Default values are Own or Rent. Specific to Siebel CRM On Demand Financial Services Edition.
Home Value	Specific to Siebel CRM On Demand Financial Services Edition.

## Contacts

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Field	Description
Date of Birth	Specific to Siebel CRM On Demand Financial Services Edition.
Tax Bracket	Specific to Siebel CRM On Demand Financial Services Edition.
Customer ID	Specific to Siebel CRM On Demand Financial Services Edition.
Gender	Default values are F and M. Specific to Siebel CRM On Demand Financial Services Edition.
Self-Employed	Specific to Siebel CRM On Demand Financial Services Edition.

# 7 Opportunities

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Use the Opportunity pages to create, update, and track opportunities. *Opportunities* are potential sales deals that, at some point, might be included in revenue forecasting.

## About Opportunities and Forecasts

An *opportunity* is a potential revenue-generating transaction that is included in your sales forecast when it reaches a specific point in your sales process. You can create an opportunity by converting a qualified lead to an opportunity or you can create a new opportunity for an existing account or contact.

Opportunity records help you to manage your sales pipeline as you work to close deals. All of your opportunity information is visible in one place and is linked to related lead, contact, and account information. This information gives you a complete picture of your opportunity and your customer.

## Tips for Managing Your Opportunity Records

Updating your opportunity information as you work to close a deal facilitates clear team communication and ensures accurate forecasts and reports. It is particularly important to keep certain fields on the Opportunity Detail page up to date:

- The Revenue, Close Date, and Sales Stage fields are critical for tracking pipeline history and are used for trend analyses.
- If your company bases its forecasts on opportunities, select the Forecast check box on an opportunity record to add the opportunity to your forecast at the appropriate time in the sales process. If your company bases its forecasts on products, select the Forecast check box on your linked products instead.

### Sales Stages

Every sales process is defined by specific stages. Each sales stage has certain activities and deliverables, or tasks that must be completed before the opportunity is advanced to the next sales stage. As you work on an opportunity, you evaluate it against clearly defined criteria for each stage in your company's sales cycle.

- As criteria are met, update the Sales Stage field in your opportunity record.
- The Probability percentage field on the opportunity record defaults to a value related to the selected Sales Stage for the opportunity. You can change this value, if needed, to better reflect your particular opportunity while it is in that Sales Stage. However, when the Sales Stage changes, the value in the Probability field again defaults to the value related to the new Sales Stage.
- The Expected Revenue field displays a currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field. This figure is used for forecasting.
- Update the Next Step field to reflect the criteria for the next stage in the sales cycle.

### Forecasting

When the application generates forecasts, it determines which records, fields, and data to include according to your forecasting method. If certain conditions are met, it includes those records in the forecasts:

- 1 **Close Date.** The application verifies that the Close Date for the opportunity record falls within this quarter.

Whether forecasts are based on product revenue or opportunity revenue, the *opportunity* record (either alone or linked to products) must show a close date that falls within the quarter. For example, an opportunity with a close date of March 1 is in the Q1 forecast.

- 2 **Expected Revenue, Pipeline.** The application calculates the Expected Revenue and Pipeline forecast data.

- Calculates the total for the Expected Revenue fields in either the opportunity or product revenue records and displays the sum in the Expected Revenue field in the Forecast record.

**NOTE:** For the Expected Revenue to accurately reflect expected revenue based on opportunity products, the user must click the Update Opportunity Totals button. This functionality is only available if the Product Probability Averaging Enabled option is enabled on the company profile.

- Calculates the total for the Revenue fields in either the opportunity or product revenue records and displays the sum in the Pipeline field in the Forecast record.

**NOTE:** For products, only the revenue amount that pertains to that time period is included, not the total product revenue.

- 3 Forecast.** The application retrieves the Revenue field data from records with the Forecast check box selected and displays the sum in the Forecast field in the Forecast record:
- If your company bases its forecasts on opportunities, records with the Forecast check box selected on the Opportunity Edit page are included.
  - If your company bases its forecasts on products, records with the Forecast check box selected on the Product Revenue Edit page are included.
  - The application ignores the values in records without the Forecast check box selected.
- 4 Closed Revenue.** For *opportunity* records with a Sales Stage of Closed-Won, the application retrieves the Revenue field data from these records and displays the total in the Closed Revenue field of the Forecast record:
- If your company bases its forecasts on opportunities, records with the Forecast check box selected on the Opportunity Edit page are included.
  - If your company bases its forecasts on products, records with the Forecast check box selected on the Product Revenue Edit page are included.
- NOTE:** For products, only the revenue amount that pertains to that time period is included in the Closed Revenue field, not the total product revenue.
- The application ignores the values in records without the Forecast check box selected.

## Opportunity Homepage

The Opportunity Homepage is the starting point for managing opportunities. This page contains several sections and displays opportunity information that is relevant to you. If your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

The following are some of the sections that can be displayed on your Opportunity Homepage:

### Opportunity Lists Section

The Opportunity Lists section shows this information:

- **Opportunity Lists.** The first 10 filtered lists. Filtered lists are subsets or groups of opportunities that allow you to limit the number of opportunities to work with at a time.

The application comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

If an already-created list does not appear on the Opportunity Homepage, click any list. Then, on the Opportunity List page, click the drop-down list to see all the available lists, and make your selection.

The following table describes the standard lists.

Opportunity List	Filters
All Closed Opportunities	Sales Stage = Closed/Won
All Large Opportunities	Revenue greater than 100,000
All Opportunities	All opportunities to which you have visibility
Recently Created Opportunities	All opportunities to which you have visibility, sorted by the created date
Recently Modified Opportunities	All opportunities to which you have visibility, sorted by the modified date
My Forecast Opportunities	Forecast check box is selected
My Opportunities	All opportunities with your name in the Owner field
My Top Opportunities	All opportunities that you own with Priority = High

For information on creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** This link takes you to the page where you can review all available filtered lists, create a new list, or view, edit, or delete an existing list. The Manage Lists page also includes the standard lists delivered with CRM On Demand. These lists are view-only; therefore you cannot edit or delete them.

### My Recently Viewed Opportunities Section

The My Recently Viewed Opportunities section shows this information:

- **My Recently Viewed Opportunities list.** List of your most recently viewed opportunities.
- **Show Full List.** Link for expanding the filtered opportunity list.

### My Open Opportunity Related Tasks Section

The My Open Opportunity Related Tasks section shows this information:

- **Opportunity-Related Tasks.** Tasks with an associated opportunity.  
**NOTE:** If you create a task in this section without a linked opportunity, the task does not appear in this section.
- **Due Date.** Date task is due as set by you or your manager.
- **Arrow symbol.** Priority for tasks as set by you or your manager. An upward pointing red arrow indicates high priority, a downward pointing green arrow indicates low priority, and no arrow indicates medium priority.



- **Subject.** Title of task. Click the link to review the task.
- **Opportunity.** Opportunity associated with the task.
- **Show Full List.** Link for expanding the list of opportunity activities.

## Pipeline Analysis for Current Quarter Chart Section

Your company administrator can change the analysis shown in this section. In the standard application, the Pipeline Analysis section shows a quarterly analysis of the pipeline in a chart format, which can help to identify opportunities and challenges.

In this section, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view different opportunity and revenue analysis reports. For example, you can generate an analysis that shows the number of Opportunities by Region.

## Other Sections

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Opportunity Homepage:

- My Recently Created Opportunities
- My Recently Modified Opportunities
- Recently Created Opportunities
- Recently Modified Opportunities
- My Current Opportunity Related Tasks
- Opportunity Tasks

### *To add sections to your Opportunity Homepage*

- 1 On the Opportunity Homepage, click the Edit Layout link.
- 2 On the Opportunity Homepage Layout page, use the directional arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

## Steps for Opportunities

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32)
- [Updating Record Details](#) (on page 48)
- [Sharing Records \(Teams\)](#) (on page 68)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Working with Lists](#) (on page 56)
- [Tracking Partners and Competitors of Opportunities](#) (on page 178)
- [Accessing the Sales Process Coach](#) (on page 179)
- [Linking Products to Opportunities](#) (on page 180) (allows tracking of product revenue)
- [Viewing Audit Trails for Opportunities](#) (on page 184)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Tracking Partners and Competitors of Opportunities

Siebel CRM On Demand provides areas in the application where you can track information on partners or competitors of your opportunities. For example, you might want to track which companies (accounts) you do business with for Opportunity XYZ or which companies (accounts) you compete with for Opportunity XYZ.

To do so, first link the account acting as your partner or competitor to the opportunity record. (You can link as many partner or competitor accounts as you want.) Then add information to the Opportunity Partner or Competitor Edit page about the partner or competitor, such as its strengths and weaknesses.

**Before you begin.** Create an account record for each partner or competitor you want to link to your opportunity. When creating that record, select Partner or Competitor as the Account Type. For instructions on adding records, see [Creating Accounts](#) (on page 139).

***To track partner and competitor information of opportunities***

- 1 Select the opportunity.

For instructions on selecting opportunities, see [Finding Records](#) (on page 35).

- 2 On the Opportunity Detail page, scroll down to the Competitor or Partner section and do one of the following:

- To link an account, click Add.
- To update information, click the Edit link next to the existing partner or competitor.

- 3 On the Opportunity Competitor or Partner Edit page, enter the required information.

The following table describes some field information for tracking partner or competitor information.

Field	Comments
Partner	Click the Lookup icon, and select the account whose relationship and information you want to track as your partner with this opportunity.
Competitor	Click the Lookup icon, and select the account whose relationship and information you want to track as your competitor for this opportunity.
Is a	Select an option that defines the relationship between your opportunity and this account. In the second line, select the option that defines the reverse relationship or role.  Default values are Customer, Partner, System Integrator, Vendor, and Reseller. Your company administrator can change or add values to the drop-down list.
Start Date	Default is today's date. You could use this field to record the start date of a partnership.
End Date	You could use this field to record the expiration date of a partnership.

- 4 Save the record.

## Accessing the Sales Process Coach

At each sales stage of an opportunity, your company might need to collect specific information, according to their business practices. To guide you in completing the information, your company administrator can set up follow-up tasks, require that you fill in specific information, and add information for you to review at each phase of the sales process.

**Note:** Your company can set up different sales processes (stages, probabilities, and coaching information) for different roles and different opportunity types. For example, if some sales representatives sell products while others sell services, they might be linked to different roles and, as a result, see different options for sales stages and different guidelines in the sales process coach.

### *To access the coach information relating to the sales stages*

- 1 Select the opportunity.  
For instructions on selecting opportunities, see [Finding Records](#) (on page 35).
- 2 On the Opportunity Detail page, click the Coach button.
- 3 Review the Process Coach page for information that your company administrator set up, and update the opportunity record accordingly.  
**TIP:** You can print the information by right-clicking on the Process Coach page.  
**NOTE:** In the Useful Resources section, click View in the row of any attachment for further information.
- 4 To update the opportunity, click Edit and revise the record information to meet the coach instructions.
- 5 Save the opportunity record.
- 6 When you update the Sales Stage field, the application prompts you to fill in required fields. Also, some fields might default to certain values, but you can update those.
- 7 Click Close in the Process Coach window.

If your company administrator has set it up, some tasks are added to this opportunity and this opportunity's linked account when you save the record.

### Related Topics

Setting Up Sales Processes, Categories, and Coaches 647

## Linking Products to Opportunities

You can link products to opportunities to:

- Track which products belong to the opportunity
- Calculate opportunity revenue based on product revenue
- Base your company's forecasts on product revenue

**Before you begin.** Your company needs to inform you of the forecasting method it wants to use. Companies can forecast revenue on opportunity or product revenue, but not on both. The company forecasting method determines which fields you need to select when linking products to your opportunities.

**NOTE:** The Update Opportunity Totals button is used to calculate opportunity revenue based on product revenue. This functionality is only available if the Product Probability Averaging Enabled option is enabled on the company profile. For the Update Opportunity Totals button to work correctly, the Quantity and Revenue fields must be present on the Product Revenue Edit

page. Your company administrator can customize your page layout to make these fields available.

### *To link products to opportunities*

- 1 Select the opportunity.

For instructions on selecting opportunities, see [Finding Records](#) (on page 35).

- 2 On the Opportunity Detail page, scroll down to the Products section and do one of the following:

- To link a product, click Add.
- To update product information, click the Edit link next to the existing product.

- 3 On the Product Revenue Edit page, complete the Product Revenue Fields.

- a Fill in the quantity and price information.
- b In the Recurring Revenue section of the Product Detail page, enter details about how often and when the revenue should be recognized.
- c Enter the date on which the first revenue should be recognized.
- d If your company forecasts revenue based on product revenue, select the Forecast check box.

**NOTE:** If your company forecasts revenue based on opportunity revenue, not product revenue, it is best to leave the Forecast check box blank on the Product Revenue page.

- 4 Save the record.

### *To calculate opportunity revenue based on product revenue*

- 1 Select the opportunity.

For instructions on selecting opportunities, see [Finding Records](#) (on page 35).

- 2 On the Opportunity Detail page, do the following:

- Clear the Forecast check box.

If your company bases its forecasts on product revenue, select the Forecast check box on the Product Revenue Edit page, not on the Opportunity Edit page.

- Clear the Revenue field.

Your product revenue is added to the opportunity revenue when you click Update Opportunity Totals. If you entered opportunity revenue and are now

switching to forecasting based on product revenue, you probably want to clear the revenue fields in the Opportunity record. Otherwise, it does not show strictly product revenue.

**NOTE:** For information about editing fields inline on the Opportunity Detail page, see [Updating Record Details](#) (on page 48).

- 3 Save the record.
- 4 On the Opportunity Detail page, scroll down to the Products section and do one of the following:
  - To link a product, click Add.
  - To update product information, click the Edit link next to the existing product.
- 5 On the Product Revenue Edit page, complete the Product Revenue Fields.
- 6 Save the record.
- 7 On the Opportunity Detail page, click the Update Opportunity Totals in the Products section.

This totals the product revenue for each linked product and displays it in the Revenue and Expected Revenue fields for the Opportunity. If you had revenue in the opportunity record, the product revenue is added to the opportunity revenue.

### *To base your company's forecasts on product revenue linked to opportunities*

- 1 Follow Step 1 through Step 5 of the "To calculate opportunity revenue based on product revenue" procedure.
- 2 On the Product Revenue Edit page, complete the Product Revenue Fields and select the Forecast check box.

Selecting the Forecast check box indicates that you want this record information to contribute to your company's forecasts.
- 3 Save the record.
- 4 (Optional) On the Opportunity Detail page, click the Update Opportunity Totals in the Products section.

**NOTE:** If a product is not sold, either remove the product from this opportunity or, if it is the only product, clear the Forecast check box. This prevents the revenue from being added to your company's forecasts.

If one product of several linked to this opportunity is on hold, create another opportunity for that product to prevent its revenue from being included in the forecast.

## Product Revenue Fields

The following table describes field information for product revenue. Your administrator can add, re-label, or delete fields, so the fields you see might differ from those in this table.

**CAUTION:** If your company bases its forecasts on products, the information that you enter for product revenue can affect its calculations.

Field	Description
<b>Key Product Information</b>	
Product Name	Only products marked Orderable by your company administrator can be selected. When you link a product to this opportunity, these fields are copied from the product definition: Product Category, Part #, Type, Status, and Description.
Quantity	Number of units the customer orders. For a recurring product, enter the quantity of the product per recurring period. For example, if you send 10 printer cartridges each month, enter 10 here.
Purchase Price	Product price.
Revenue	Quantity multiplied by Purchase Price. The revenue cannot be overwritten. If the Forecast check box is selected, this revenue amount contributes to your company's forecast totals.
Product Category	Category carried over with the product definition. Read-only.
Part #	Number carried over with the product definition. Read-only.
Type	Type carried over with the product definition. Read-only.
Status	Status carried over with the product definition. Read-only.
Description	Additional information about the product. Limit of 2,000 characters.
<b>Recurring Revenue Information</b>	
Start/Close Date	<p>For an opportunity, the expected close date. For a recurring product, the start date. For a recurring product with a close date that ends on the last day of the month and a start date of mid-month, add one record for the full recurring price and another record for the prorated order.</p> <p>For example: You start supplying paper to a company on May 15th. After that, you will be sending \$500 worth of paper at the end of each month through the end of the year.</p> <p>For the mid-month order, add a product record with these values:  Revenue = \$250  Quantity = 1</p> <p>For the recurring order, add a second product record with these values:  Revenue = \$500  Quantity = 1  Frequency = Monthly  #of Periods = 7 (June through December).</p>

Field	Description
Frequency	Frequency for a recurring product. Bi-weekly means twice a week.
# of Periods	Number of periods for a recurring product.
<b>Sales Information</b>	
Sales Stage	Sales Stage carried over from the opportunity.
Probability	<p>Probability of a successful outcome for the product sale. The initial value in this field is carried over from the Sales Stage of the opportunity. You can change the value, if needed, to better reflect your particular product.</p> <p><b>NOTE:</b> When the Sales Stage changes, the value in the Probability field on the opportunity record again defaults to the value related to the new Sales Stage, but the value in the Probability field on the product is not overwritten.</p>
Expected Revenue	A currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field.
Account	Account linked to this opportunity. Read-only.
Owner	<p>Person assigned to this opportunity. Generally, the owner can update record details, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p> <p>Each record has only one owner. However, opportunity records can be shared with other users through Opportunity Team or Account Team pages. For instructions, see <a href="#">Sharing Records (Teams)</a> (on page 68).</p>
Forecast	Indicator to include this product in forecasting totals.

## Viewing Audit Trails for Opportunities

Your company administrator determines which opportunity fields (if any) are audited. You can view the audit trail that tracks the changes made to the audited fields.

By default, the following fields are audited for opportunities, but your company administrator can customize this list:

- Revenue
- Close Date
- Forecast
- Sales Stage
- Probability
- Owner



**Before you begin.** In the standard application, the opportunity audit trail is not displayed. To add it to the Opportunity Detail page, your company administrator must grant read-only access to the related information for opportunities for your role. Then you must click the Edit Layout link on the Opportunity Detail page and add the Audit Trail as a Related Information section (see [Changing Your Detail Page Layout](#) (on page 317)).

### *To view the audit trail for an opportunity*

- 1 Select the opportunity.

For instructions on selecting opportunities, see [Finding Records](#) (on page 35).

- 2 On the Opportunity Detail page, scroll down to the Audit Trail related information.

Each row shows the date the record is updated, who made the update, and the new and old values in the field.

## About Opportunity Teams

For some record types, such as accounts, contacts, and opportunities, you can allow a team of users to share a record. To allow a user to share a record, you first add the user to the team for the selected record. Then you specify the access level the user has to the record, and to specified linked records.

Note the following points regarding opportunity teams, account teams, and access to opportunity records:

- Based on the opportunity access type you define when you add a user to an account team, the user can be added to an opportunity team automatically when the opportunity is linked to the account. (Similarly, account team members can automatically become members of a contact team when the contact is linked to an account.)
- If you do not want a user to be added to the opportunity team automatically when the opportunity record is linked to an account, leave the Opportunity Access field in the Account Team Add User window blank when adding the user to the account team. This prevents the account team member from being added to the opportunity team automatically.

If the privileges on the user's default access profile give the user access to Opportunity Related Information on the accounts, the user still has visibility to the related records. However, the user is not added to the opportunity team.

Note also that users can be added to account teams in a number of ways:

- Manually through the record detail page
- Through assignment manager
- Through the use of group functionality

To ensure that a user does not have access to opportunities linked to an account, you must ensure that the user is not given access through any of these methods.

## Opportunity List Page

The Opportunity List page shows the subset or list of opportunities you selected in the Opportunity Homepage. From the Opportunity List page, you can review multiple opportunities at a glance. You can edit fields inline on the Opportunity List page. You can also select an opportunity to review, update, or delete. For more information on updating records, see [Updating Record Details](#) (on page 48).

Using the drop-down menu, you can also switch to another opportunity list. The drop-down list contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table in [Opportunity Homepage](#) (on page 175).

The following table describes what you can do from the Opportunity List Page.

**NOTE:** If you access the Opportunity List page through the Account Detail page, some of these features are not available.

To do this	Follow these steps
Add opportunities to books or remove opportunities from books	On the Opportunity List title bar, click Menu, and select Batch Assign book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Create a new list of opportunities	On the Opportunity List title bar, click menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Create an opportunity	On the Opportunity List title bar, click New Opportunity. On the Opportunity Edit page, enter the required information and save the record.
Delete all records from the list	On the Opportunity List title bar, click Menu, and select Batch Delete. Complete the steps described in <a href="#">Deleting and Restoring Records</a> (on page 79).
Delete an opportunity	Click the Opportunity Name link, and from the Opportunity Details page, click Delete.
Export the list	On the Opportunity List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find an opportunity	Click the Opportunity Name column header to sort the data. Then click a letter in the alphabet bar. For opportunities beginning with numbers, click 0-9.
Manage all the opportunity lists	On the Opportunity List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.

To do this	Follow these steps
Refine the search criteria for the list	On the Opportunity List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more/fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Opportunity List title bar, click Menu, and select Show List Filter. See <a href="#">View List Page</a> (on page 65) for an explanation of the information.
Update a group of opportunity records at once	On the Opportunity List title bar, click Menu, and select Mass Update. Complete the steps described in <a href="#">Updating Groups of Records</a> (on page 69).
Update an opportunity	Edit fields inline on the Opportunity List page or select the service request to open the Details page. For more information on updating records, see <a href="#">Updating Record Details</a> (on page 48).
View a subset of opportunities	On the Opportunity List title bar, click the drop-down list and change the selection.
View all opportunities	Click the All link in the alphabet bar.

## Opportunity Detail Page

Click a topic to see instructions for doing the following from the Opportunity Detail page:

- [Updating Record Details](#) (on page 48)
- [Tracking Partners and Competitors of Opportunities](#) (on page 178)
- [Accessing the Sales Process Coach](#) (on page 179)
- [Linking Products to Opportunities](#) (on page 180)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Sharing Records \(Teams\)](#) (on page 68)
- [Changing Your Detail Page Layout](#) (on page 317)

## Opportunity Fields

Use the Opportunity Edit page to add an opportunity or update details for an existing opportunity. The Opportunity Edit page shows the complete set of fields for an opportunity.

**TIP:** You can also edit opportunity information on the Opportunity List page and the Opportunity Detail page. For more information on updating records, see [Updating Record Details](#) (on page 48).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

**CAUTION:** Information you enter for opportunities can affect the revenue forecasts for your company.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Opportunity Information</b>	
Opportunity Name	Name for this opportunity.
Account	Account linked to this opportunity.
Sales Stage	Stages in the sales process, such as Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won, or Closed/Lost.
Next Step	Next action that needs to be accomplished for this opportunity.
Revenue	Amount of opportunity. Affects forecasting.
Close Date	Expected date for opportunity to close. The value defaults to Created date. This date is used in revenue forecasting, so it is important to change the default to the expected close date.
Forecast	Indication to include this opportunity in the forecasting calculation, if other criteria are met.
<b>Sales Detail Information</b>	
Status	Status of opportunity, such as Pending, Lost, or Won.
Priority	Priority level for this opportunity, such as High, Medium, and Low.
Lead Source	Category of the primary source, such as Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Partner, Referral - Employee, Referral - External, Web Site, or Other.
Source Campaign	The campaign that generated the opportunity. This field is automatically populated during the lead conversion process or specified by the user when a new opportunity is created.

Field	Description
Probability %	<p>Percentage that reflects the confidence you have that the deal will close with the specified revenue on the specified close date. The Probability percentage field defaults to a value related to the selected Sales Stage.</p> <p>You can change the value, if needed, to better reflect your particular opportunity while it is in that Sales Stage. However, when the Sales Stage changes, the value in the Probability field again defaults to the value related to the new Sales Stage.</p>
Expected Revenue	A currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field. A lower percentage in the Probability field reduces the expected value that is included in your revenue forecast.
Reason Won/Lost	Reason for opportunity being won or lost, such as Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision, or Other.
<b>Additional Information</b>	
Modified By	Name of the person who created or last updated the opportunity record followed by the date and time of the update.
Owner	<p>Person assigned to this opportunity. Generally, the owner can update record details, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p> <p>Each record has only one owner. However, opportunity records can be shared with other users through Opportunity Team or Account Team pages. For instructions, see <a href="#">Sharing Records (Teams)</a> (on page 68).</p>
Reassign Opportunity	<p>Indicates that the opportunity should be reassigned. If your company administrator has set up opportunity assignment rules, selecting this field triggers assignment manager to process the opportunity again and assign it according to the rules.</p> <p><b>NOTE:</b> The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and the current system load. In the case of opportunities, the processing time is also affected by the number of opportunity team members, and the number of accounts and contacts associated with the record. The owner name changes when the record is reassigned.</p>
Primary Contact ID	<p>Identifies the primary contact for the opportunity.</p> <p><b>NOTE:</b> In releases earlier than Release 14, this field was called <i>Key Contact ID</i>.</p>

## Opportunities

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Field	Description
Description	Additional information about the opportunity. For example, include the product interest (500 parts) and the account (Acme Corp.) in the opportunity description. Limit of 2,000 characters.

# 8

## Forecasts

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Use the Forecast pages to review, adjust, and submit forecasts. A *forecast* is a saved snapshot of revenues over time.

### About Forecasts

A *forecast* is a snapshot of revenues over time. Siebel CRM On Demand calculates forecasts over quarters and breaks down that information by month.

Forecasts in Siebel CRM On Demand automate a process that is often manual, and sometimes inaccurate. Forecasts help companies to develop sales strategies and identify future business needs by giving managers accurate and up-to-date information about expected sales and quarterly progress toward sales targets. Individual sales representatives do not have to compile statistics. Instead, they decide when to include a record in their forecasts. The remainder of the process is automatic.

Your company can base its forecasts on only *one* of the following:

- Opportunity revenue
- Product revenue linked to opportunities
- Account revenue
- Contact revenue

The forecast snapshots save the forecasted opportunity or product information and the adjusted forecast totals so you and your managers can review and evaluate forecast trends. In addition, you can view saved forecasts to examine the history of opportunities on which the team is currently working.

Your company sets up forecasts to be run on a weekly or monthly basis. At the start of the specified day (that is, at one minute past midnight) in the time zone of the hosting facility, Siebel CRM On Demand automatically generates the forecast and displays an alert that appears on My Homepage. After receiving this alert, you can review the forecast to analyze the newly-calculated pipeline, forecast, and closed revenue against the quotas information.

An hour before the next scheduled forecast generation, the current forecast is automatically archived, preventing anyone from editing it.

When calculating forecasts, Siebel CRM On Demand retrieves records meeting a series of conditions.

## Forecast Homepage

The Forecast Homepage is the starting point for managing forecasts. This page lists forecast summary information relevant to you.

- **All and Alpha-Numeric Links.** Locate specific forecasts by clicking the alpha-numeric links. Click the All link to show the entire list of forecasts.
- **Number of records displayed.** Adjust the value in this field to show a greater or lesser number of records in the summary list.

The Forecast Homepage lists your forecasts according to the date on which they were created and gives a summary of key information:

- Pipeline revenue is the combined revenue from all your records, regardless of the setting of the Forecast check box on the individual records.
- Forecast revenue equals the total revenue for all records that have the Forecast check box selected.
- Closed revenue equals the total revenue for all opportunities with a sales stage value of Closed-Won. For product, account, and contact revenue forecasts, closed revenue is recognized in the period between the Start and Close date.

## Steps for Forecasts

Click a topic to see step-by-step procedures to do the following:

- [Reviewing Forecasts](#) (on page 193)
- [Refreshing Forecasts](#) (on page 194)
- [Submitting Forecasts](#) (on page 196)
- [Unsubmitting Forecasts](#) (on page 197)
- [Managing Quotas](#) (on page 197)
- [Managing Your Team's Forecasts](#) (on page 198)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.



Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

### Related Topics

Forecast Fields	200
Forecast Homepage	192
About Forecasts	191
Reports	361

## Reviewing Forecasts

Forecasts are generated automatically either weekly or monthly, according to your company's business process. You receive an alert on My Homepage each time a new forecast is generated. After you receive the notification, you should review the forecast.

### *To review forecasts*

- 1 Click the Forecasts tab.

The Forecast Homepage shows forecast summary information that includes Status, Pipeline, and Closed Revenue. You can sort the forecast summary by status and forecast date.

- 2 In the Forecast Homepage section, click the Forecast Date link for the forecast you want to review.

- 3 On the Forecast Detail page, review the information in the following sections:

- **Forecast Summary.** This section summarizes forecasts by month. The Forecast Summary list provides information on Quota, Closed Revenue, Quota Percent, Forecast amount, Best Case, Pipeline, and Expected Revenue. You can sort the summary list by month.

**Team's Summary by Month.** This section shows a list of forecasts for each team member. If you are a manager, you can sort the information by Owner Alias (team member), Date, Forecast amount, Closed Revenue amount and Last Updated.

**NOTE:** The Forecast Detail page shows only five of your team's records. To view the entire list of records, click the Show Full List link under the Team's Summary by Month section.

- **My Opportunities or My Revenues.** This section lists current opportunities, and indicates whether the opportunity is forecasted. It also shows the Account Name, the Revenue, and the Sales Stage, if specified, for each opportunity. If your company bases its forecasts on product revenue, product names appear in this section as well.

### Viewing and Editing Forecasts Using a Different Currency

The View in currency conversion feature allows you to specify in which currency your forecast should be displayed. By default, the forecast will be displayed in your native currency (the default currency selected on your user profile). You can also edit forecasts in the selected currency if you are managing opportunities in multiple economic zones.

If the forecast is edited while being viewed in EUR, then the user can enter in forecast values in EUR. When the edited forecast is saved, it is converted to, and saved in the corporate currency.

#### *To view a forecast using a different currency*

- 1 Click the Forecasts tab.
- 2 From the Forecast Homepage, click the Forecast Date link for the forecast you want to review.
- 3 On the Forecast Detail page, select the currency from the View in drop-down list in the Forecast Summary title bar.

The View in currency value defaults to your company's default currency. All of your company's active currencies are available for selection.

When you select a View in currency, the forecast values are converted from the stored Forecast Currency (corporate currency) to the selected View in currency using the valid exchange rates for the Forecast Date.

If you drill into a forecast record, or select a View-in currency that does not have a valid exchange rate defined for the forecast date, the forecast is displayed in your company's corporate currency instead, and an advisory message is displayed.

### Refreshing Forecasts

You can refresh some values for an unsubmitted forecast if an opportunity or product value changes. After you make the adjustments, you submit the forecast so that Siebel CRM On Demand recalculates and updates all forecasting totals.

You can adjust forecasts that have not been submitted. However, rather than changing the forecast totals, it is better to update the record values that contribute to the forecast amounts, and then recalculate the forecast totals, as described in this section. Updates to the Revenue, Close Date, Sales Stage, Probability, Forecast, or Status fields can affect your forecast.

#### *To update record values and refresh forecast amounts*

- 1 Click the Forecasts tab.

The Forecast Homepage shows the forecast for each month in the current quarter.

- 2 In the Forecast Homepage Section, select the unsubmitted, active forecast record, and then click the Forecast Date link to view the Forecast Details page for the time period you want to update.
- 3 In the My Opportunities or My Revenues section on the Forecast Detail page, click the Opportunity Name or Product link for the record that you want to modify.
- 4 On the Detail page, click Edit.
- 5 On the Edit page, update the appropriate values for the opportunity or product, and save the record.
- 6 Navigate back to the Forecast Detail page, and then click the Refresh link in the record row.
- 7 On the Forecast Detail page, click Rollup.

This updates (recalculates) the Total fields based on your opportunity updates.

After updating your records, you might still want to adjust your forecast summary to reflect your sales expectations more accurately.

## Adjusting a Forecast Summary

Sales representatives and managers can make high-level adjustments by month to the forecast summary to make sure that the automatically generated forecast reflects values based on professional judgement. You can adjust the following forecast summary fields manually, if necessary:

- Forecast
- Best Case

### *To adjust a Forecast Summary manually*

- 1 Click the Forecasts tab.
- 2 In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to adjust.
- 3 In the Forecast Summary section, click Edit.
- 4 On the Forecast Edit page, change the values in the Forecast and Best Case fields.
- 5 Click Refresh Totals, and then click Save.

## Viewing Forecast History

You can view a history of forecasts to determine trends over time.

### *To view your forecast history*

- 1 Click the Forecast tab.
- 2 In the Forecast Homepage section, click the Forecast Date column header to sort the records by date.
- 3 Review the trends over time for forecasts, pipeline, and closed revenue.

## Submitting Forecasts

When the forecast reflects the amounts you want to include in your company's forecasts, submit the forecast. Before a manager can submit a forecast, all of the manager's direct reports must first submit their forecasts.

Submitted forecasts cannot be edited. If you need to adjust a submitted forecast, your manager or administrator must first unlock (unsubmit) the record. For more information, see [Unsubmitting Forecasts](#) (on page 197).

### *To submit your forecast*

- 1 Click the Forecasts tab.
- 2 In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to submit.
- 3 On the Forecast Detail page, click Submit Forecast in the Forecast Summary title bar.

#### **Related Topics**

[Unsubmitting Forecasts 197](#)

## Unsubmitting Forecasts

Before the forecast owner can adjust a submitted forecast, a manager or administrator must first unlock (unsubmit) the record.

### *To unsubmit a forecast*

- 1 Click the Forecasts tab.
- 2 In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to unlock.
- 3 On the Forecast Detail page, click Unsubmit Forecast.

This action unlocks the forecast, allowing direct reports to update and adjust their forecasts, and then resubmit the forecasts.

### Related Topics

Submitting Forecasts 196

## Managing Quotas

If your administrator is not responsible for setting your quotas, you can create and update quotas for periods throughout the year using the Edit Quota page. This allows you to compare and adjust your quotas against forecasts. You also can review your quota target history for every period, in each year.

After a quota is created, the monthly quota values are automatically reflected in the forecast after the forecast is generated. All active quotas are added together for the month and the totals are displayed in the forecast. If you do not want a quota to be included in your forecast, set the Status field to Inactive until you are ready to track the quota.

### *To manage your quota*

- 1 From any page, click the My Setup link in the top right corner.
- 2 From the Personal Homepage, click the Personal Profile link in the Personal Profile section.
- 3 From the Personal Profile page, click the My Profile link in the Personal Information section.

My Profile allows you to define quotas and sharing groups, as well as change your currency, language, and time zone.

- 4 On the Personal Detail page, scroll down to the Quotas section, and then click New Quota.  
Existing quotas appear in the Quotas list, and can be sorted by year, name and status.  
If you want to modify a listed quota, click the Edit link in the row of the quota record you want to edit. To remove a quota from the list, click the Del link in the row of the quota record you want to delete.
- 5 On the Edit Quota page, complete the required fields for the new quota:
  - a Select the fiscal year.
  - b Make sure the Status is Active.
  - c Enter a name for the quota.
- 6 Enter quota information for each month. (The monthly quota fields start with the first month of your company's fiscal year.)
- 7 Save the quota.

### *To spread a total quota amount evenly across months of the year*

- 1 On the Personal Detail page, scroll down to the Quotas section, and then click New Quota.
- 2 On the Edit Quota page, enter the required information, making sure the quota Status is Active.
- 3 In one of the month fields, enter the total quota amount for the year, and then click Sum.  
The amount appears in the Total Quota field.
- 4 Click Spread.  
The total amount is spread equally across the 12 months of the year, and the apportioned amount appears in the fields associated with each month.
- 5 Save the quota.  
The quota appears in the Quotas list. Click the Edit link in the record row to modify the quota. Click the Del link in the row to remove the quota.

## Managing Your Team's Forecasts

If you are a manager, you can:

- Review and adjust forecasts for your team
- View all opportunities owned by your team
- Unsubmit a forecast so that a team member can adjust it

Your team consists of all employees associated to roles that report to you. This role hierarchy is set up in User Administration. For more information, see [Setting Up Users](#) (on page 611).

### *To review forecasts and opportunities for your team*

- 1 Click the Forecasts tab.
- 2 In the Forecast Homepage section, click the Forecast Date link in the forecast record.  
The Forecast Detail page shows a summary of your team's totals, the totals for each team member by month, and the date the forecast was last updated.
- 3 On the Forecast Detail page, click the Owner Alias link of the team member whose forecast you want to view.

**TIP:** If you want to display the forecast summaries of all your team members, click the [Show Full List](#) link.

The team member's Forecast Detail page appears. From this page, you can review the team member's forecast totals and all of the individual's forecasted opportunities, but since the details are read-only, you cannot edit them.

## Forecast Details Page

The Forecast Details page displays forecast information for the individual submitting it. The page shows the forecast summary, which lists forecasts by month, and the individual's opportunities. Managers and administrators can also see their team's summary by month.

The following table describes what you can do from the Forecast Details page.

To do this	Follow these steps
Show all opportunity records	Click the Show Full List link under the My Opportunities section.
Show all your team's records	Click the Show Full List link under the Team's Summary by Month section.
Submit a forecast	In the Forecast Summary section, click Submit Forecast.
Update a forecast record	In the Forecast Summary title bar, click Edit. This opens the Forecast Edit page.
Update an opportunity	In the My Opportunities section on the Forecast Detail page, click Refresh. To modify opportunity details, click the Opportunity Name link.
Change the currency for a displayed forecast	In the Forecast Summary title bar, click View in and select the currency.

## Forecast Fields

Use the Forecast Edit page to update Forecast and Best Case information for a forecast. The Forecast Edit page shows forecast details such as Forecast Date, Closed Revenue, Forecast, Best Case, Pipeline, and Expected Revenue. The adjustments are automatic, and can be viewed by all of your managers and supervisors, but cannot be viewed by subordinates.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing the names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Best Case	Field entered manually that represents the total best-case value of all opportunity or product revenue.
Closed Revenue	Calculated field. You cannot edit it manually. If your company bases its forecasts on opportunities, it is the total value of all eligible opportunities with a Sales Stage of Closed-Won. If your company bases its forecasts on products, it is the total product revenue paid to your company during that time period, for products linked to opportunities with the Sales Stage of Closed-Won.
Expected Revenue	Weighted average. The value is calculated based on the potential revenue field multiplied by the value in the opportunity Probability field. A lower percentage in the Probability field reduces the expected value that is included in your revenue forecast.
Forecast	<p>The value in this field is calculated when the forecast is generated. However, sales representatives and managers can adjust the value in this field manually to make sure that the automatically generated forecast reflects values based on professional judgment.</p> <p>If the Forecast check box is selected in the Opportunity record, this is the total of all opportunities in the forecast quarter. If the Forecast check box is selected in the Product Revenue record, this is the total of all product revenue linked to opportunities in the forecast quarter.</p>
Owner	System-generated value.
Pipeline	Calculated field. It is the total value of all opportunity or product revenue for the quarter, with or without the Forecast check box being selected. It cannot be edited manually.
Quota	A value that either you or your administrator sets up.
Quota %	Calculated field. It is the closed revenue value divided by the quota value.



Field	Description
Status	<p>Status of forecast (system-generated value):</p> <ul style="list-style-type: none"><li>■ <b>Active</b></li><li>■ <b>In Progress.</b> System sets this status after an auto-forecast is performed.</li><li>■ <b>Auto-Forecasted.</b> System sets this status when it generates a forecast.</li><li>■ <b>Submitted.</b> System sets this status when you click the Submit Forecast button. The record is locked unless your manager unsubmits it.</li></ul>



# 9 Service Requests

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Use the Service Request pages to record, track, and address customer requests for information or assistance.

## About Service Requests

Service Requests serve as the file of record for all service activity. Service Requests include the detail information regarding the service issue. Additional information, such as solutions or activities required to resolve the service issue, can also be captured.

By having all this information located in one place, any service representative has access to all the relevant information and can provide the highest level of service to a customer.

To ensure the highest levels of service and to create a service request record that accurately captures all service activity, changes to records are tracked through an audit trail.

## Service Requests Homepage

The Service Request Homepage is the starting point for managing service requests. This page contains several sections and displays service request information that is relevant to you. If your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

The following are some of the sections that can be displayed on your Service Request Homepage:

### Service Request Lists Section

The Service Request Lists section shows this information:

- **Service Request Lists.** The first 10 filtered lists. Filtered lists are subsets or groups of service requests that allow you to limit the number of service requests to work with at a time.

The application comes with a set of standard lists. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear above the standard set of lists.

If an already-created list does not appear on the Service Request Homepage, click any list. Then, on the Service Request List page, click the drop-down list to see all the available lists, and make your selection.

The following table describes the standard lists.

Service Request List	Filters
All Closed Service Requests	Status = Closed
All Escalated Service Requests	Status = Open - Escalated
All Open Service Requests	Status=Open, Status = Open - Escalated
All Recently Created Service Requests	All service requests, sorted by the created date
All Recently Modified Service Requests	All service requests, sorted by the modified date
All Service Requests	none
My Open Service Requests	Status = Open (displays records containing your user name in the Owner field)
My Service Requests	Service Requests with your name in the Owner field

For information on creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** This link takes you to the page where you can review all available filtered lists, create a new list, or view, edit, or delete an existing list. The Manage Lists page also includes the standard lists delivered with CRM On Demand. These lists are view-only; therefore you cannot edit or delete them.

### My Open Service Requests Section

The My Open Service Requests section shows this information:

- **My Open Service Requests list.** List of your open service requests, in the order they were created.
- **Show Full List.** Link for expanding the list of your open service requests.

## My Open Service Request Related Tasks Section

The My Open Service Request Related Tasks section shows open service request-related tasks assigned to you, sorted by due date and then priority.

- **Due Date.** Date task is due as set by you or your manager.
- **Arrow symbol.** Priority for tasks as set by you or your manager. An upward pointing red arrow indicates high priority, a downward pointing green arrow indicates low priority, and no arrow indicates medium priority.
- **Subject.** Title of task. Click the link to review the task.
- **SR Number.** Number the system assigns to identify the service request.
- **Show Full List.** Link for expanding the list of service request-related tasks.

## Open Service Request Analysis Section

Your company administrator can change the analysis shown in this section. In the standard application, the Open Service Request Analysis section allows you to see your service requests by status, priority, or product area. The graphical representation of the volume of service requests you are handling offers a view of how many open service requests exist, the breakdown by priority, or which product areas are generating the most customer calls.

In this section, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down list to view the same data from another perspective.

## Other Sections

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Service Request Homepage:

- My Current Service Request Related Tasks (tasks that are due today)
- Service-Related Tasks

### *To add sections to your Service Request Homepage*

- 1 On the Service Request Homepage, click the Edit Layout link.
- 2 On the Service Request Homepage Layout page, use the directional arrows to add or remove sections and to organize the sections on the page.
- 3 Click Save.

## Steps for Service Requests

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32)
- [Updating Record Details](#) (on page 48)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Working with Lists](#) (on page 56)
- [Assigning Service Requests](#) (on page 206)
- [Using Service Request Scripts](#) (on page 207)
- [Adding Solutions to Service Requests](#) (on page 208)
- [Escalating Service Requests](#) (on page 208)
- [Closing Resolved Service Requests](#) (on page 209)
- [Viewing Audit Trails for Service Requests](#) (on page 209)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Assigning Service Requests

When you create a service request, the owner field is blank. You can either assign the owner manually or, if your company is using assignment manager, the owner is automatically assigned when you save the record.

If a service request has already been assigned, you can reassign the request in any of the following ways:

- Change the owner name.
- Select the Reassign Owner check box.
- Delete the owner's name.

Selecting the Reassign Owner check box or deleting the owner's name triggers assignment manager to process the service request again and assign it according to the rules set up by your company.

**NOTE:** If a service request has a status of closed, it is ignored by the assignment manager and is not reassigned.

The name in the Owner field is changed when you save the record. However, the processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

### *To manually assign a service request*

- 1 Find the service request.  
For instructions on finding service requests, see [Finding Records](#) (on page 35).
- 2 On the Service Request List page, position your cursor in the Owner field and then click the search icon.
- 3 In the search window, search for the person and click select.

## Using Service Request Scripts

Your company administrator might have set up the assessment scripts to help you to gather information about the service requests (Call Scripts), or to assess the customer satisfaction levels (Customer Satisfaction Surveys). An assessment script consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

### *To use a service request script*

- 1 Select the service request.  
For more information on selecting service requests, see [Finding Records](#) (on page 35).
- 2 On the Service Request Detail page, scroll down to the Call Scripts section or the Customer Satisfaction Surveys section and click Add.  
**NOTE:** If the Call Scripts section or the Customer Satisfaction Surveys section is not shown, click the Edit Layout link in the upper-right corner of the page, and add the appropriate section to your page layout. These sections are only available to add to your page if your company administrator has set them up.
- 3 In the search window, search for the appropriate script, and click Select. You can use the filter fields at the top of the search window to filter the list of scripts.
- 4 In the Call Scripts or Customer Satisfaction Survey window, select the answer for each script question, and then click Save.

The Service Request Detail page appears again. Depending on the outcome of the script, some of the fields on the record might have been automatically updated.

## Adding Solutions to Service Requests

You can add an existing solution to your service requests. For more information on solutions, see [About Solutions](#) (on page 215).

### *To add a solution to a service request*

- 1** Select the service request.  
For more information on selecting service requests, see [Finding Records](#) (on page 35).
- 2** Scroll to the Solutions section of the Service Request Details page and click Add.
- 3** To limit the number of solutions that appear, use the filtering options to search on keywords or Solution ID.
- 4** Click Preview to view the solution details to make sure that it addresses your customer's concerns.
- 5** Click the Select link beside each solution that you want to add to your service request, and then click OK.
- 6** Change the status of the service request to Pending until you can confirm with your customer that the problem is resolved, as follows:
  - a** On the Service Request Details page, click in the Status field, and select the Pending status from the drop-down list.
  - b** Click the green check mark icon in the Status field to save the change.

## Escalating Service Requests

You can escalate a service request so that it stands out as an urgent matter.

### *To escalate a service request*

- 1** On the Service Request List page, click in the Status field of the Service Request you want to escalate.
- 2** Select Open-Escalated from the drop-down list in the field.
- 3** Click the green check mark icon in the Status field to save the change.

Your company policy determines what actions are taken when a service request is escalated. For example, your company administrator might define a workflow rule that sends an email or generates a task when a service request is escalated.

You can create a filtered list to show all escalated service requests to which you have access.



## Closing Resolved Service Requests

After you have satisfactorily answered your customer's request, you can close the service request.

**Before you begin:** View the Service Request detail page to make sure that the service request is complete by verifying the following:

- All activities on the service request have a Completed status, indicating that you have followed up with your customer.
- If your company uses solutions, the solution is linked to the service request record, indicating how the problem was solved.

### *To close a resolved service request*

- 1 On the Service Request List page, click in the Status field of the Service Request you want to close.
- 2 Select Closed from the drop-down list in the field.
- 3 Click the green check mark icon in the Status field to save the change.

## Viewing Audit Trails for Service Requests

Your company administrator determines which service request fields (if any) are audited. You can view the audit trail that tracks the changes made to the audited fields.

By default, the following fields are audited for service requests, but your company administrator can customize this list:

- Subject
- Description
- Area
- Cause
- Type
- Source
- Priority
- Status
- Owner

### *To view the audit trail for a service request*

- 1 Select the service request.  
For instructions on selecting service requests, see [Finding Records](#) (on page 35).
- 2 On the Service Request Detail page, scroll down to the Audit Trail related information.  
Each row shows the date the record was updated, who made the update, and the new and old values in the field.

## Service Request List Page

The Service Request List page shows the subset or list of service requests you selected in the Service Request Homepage. From the Service Request List Page, you can review multiple service requests at a glance. You can edit fields inline on the Service Request List page. You can also select a service request to review, update, or cancel. For more information on updating records, see [Updating Record Details](#) (on page 48).

Using the drop-down menu, you can also switch to another service requests list. The drop-down list contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table in [Service Requests Homepage](#) (on page 203).

The following table describes what you can do from the Service Request List Page:

To do this	Follow these steps
Add service requests to books or remove service requests from books	On the Service Request List title bar, click Menu, and select Batch Assign book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Cancel a service request	Select the service request. On the Service Request Edit page, change the status of the service request to Cancelled.
Create a new list of service requests	On the Service Requests List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Create a service request	On the Service Requests List title bar, click New. On the Service Request Edit page, enter the required information and save the record.
Delete all records from the list	On the Service Requests List title bar, click Menu, and select Batch Delete. Complete the steps described in <a href="#">Deleting and Restoring Records</a> (on page 79).
Export the list	On the Service Requests List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).

To do this	Follow these steps
Find a service request	Click the Subject column header to sort the data. Then click a letter in the alphabet bar. For service requests beginning with numbers, click 0-9.
Manage all the service request lists	On the Service Requests List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Service Requests List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more/fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Service Requests List title bar, click Menu, and select Show List Filter. See <a href="#">View List Page</a> (on page 65) for an explanation of the information.
Update a group of service request records at once	On the Service Requests List title bar, click Menu, and select Mass Update. Complete the steps described in <a href="#">Updating Groups of Records</a> (on page 69).
Update a service request	Edit fields inline on the Service Request List page or select the service request to open the Details page. For more information on updating records, see <a href="#">Updating Record Details</a> (on page 48).
View a subset of service requests	On the Service Requests List title bar, click the drop-down list and change the selection.

## Service Request Fields

Use the Service Request Edit page to add a service request or update details for an existing service request.

**TIP:** You can also edit service requests on the Service Request List page and the Service Request Detail page. For more information on updating records, see [Updating Record Details](#) (on page 48).

The Service Request Edit page shows the complete set of fields for a service request, as shown in the following table.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Contact Information</b>	
SR Number	Service request ID. System-generated.
Account	Account linked to the service request.
Contact	Contact linked to the service request.
Work Phone #	Work phone number of the contact. Inherited from the Contact record.
Email	Email address of contact. Inherited from the Contact record.
<b>Service Detail Information</b>	
Area	Category of service request, such as Product, Installation, Maintenance, Training, Other.
Cause	Reason for service request, such as Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Type	Type of service request, such as Question, Issue, Enhancement Request, Other.
Source	Method service request is received, such as Phone, Web, Email, Fax.
Modified By	Name of the person who created or most recently updated the service request record, followed by the date and time of the update.
Priority	Indication of priority, such as 1-ASAP, 2-High, 3-Medium, 4-Low.
Status	Status of service request, such as Open, Pending, Closed, Open-Escalated, Cancelled. Some filtered lists and reports use the Status field to determine which service requests to include.
Opened Time	Date and time you created the service request. System-generated.
Closed Time	Date and time status of service request changes to Closed. System-generated.
Owner	<p>Alias of the record owner. Generally, the owner can update the record details, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>

Field	Description
Reassign Owner	<p>Indicates that the service request should be reassigned. If your company administrator has set up service request assignment rules, selecting this field triggers assignment manager to process the service request again and assign it according to the rules.</p> <p><b>NOTE:</b> When you select this check box, the name in the Owner field changes when you save the record. However, depending on the complexity of your company's assignment rules, the number of records to be reassigned and the current system load, it may take some time for the tasks that are automatically performed to be completed, for example, sending the notification email.</p>
<b>Additional Information</b>	
Subject	Summary of service request.
Description	Additional information about the service request. Limit of 2,000 characters.



# 10 Solutions

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Use the Solution pages to create, update, and track solutions. *Solutions* contain information about how to resolve a customer problem.

## About Solutions

Solutions are detailed instructions that describe how to resolve a service or product issue and often answer frequently asked questions. By maintaining a knowledge base of solutions, your service representatives, regardless of experience, have access to a centralized knowledge base to help them quickly resolve service issues for your customers.

In addition, the knowledge base grows as users interact with customers and create new solutions.

To assist organizations in improving the information they provide or identifying potential product or service challenge areas, the system tracks the usage of solutions and allows users to rate solutions. Very active solutions could indicate a severe product defect and the need for more information. Poor solution ratings could indicate the need to provide additional or clearer explanations.

## Managing Solutions

Consider implementing a process similar to the following to build and manage a knowledge base of solutions:

- 1 A company administrator imports your existing solutions into the application (optional).
- 2 Service agents and other experts add draft solutions to expand the breadth and depth of your knowledge base over time.
- 3 Service managers review, approve, and publish solutions.
- 4 Agents score existing solutions to make sure the most helpful solutions rise to the top.

- 5 Service managers monitor the solutions knowledge base to ensure that only valid and current information is represented.

## Best Practice Tips for Managing Your Solutions Knowledge Base

Having a well-organized and peer-evaluated library of solutions helps you consistently serve your customers more effectively. Here are some best practice tips for setting up and managing your solutions knowledge base.

### 1 – Import Your Existing Solutions

Before you import solutions, compare the information in your existing solutions with the Solution record in Siebel CRM On Demand. You might want to add, rename, or remove fields from the record to match the information that you want to import.

You can use the Custom Field Setup Template, available in the Tools and Templates page in the Training & Support Center, to help you plan changes. This document will help you plan for and keep track of any custom changes that you want to make to the application.

### 2 – Add Draft Solutions

Establish guidelines for creating solution records and communicate these to anyone who might create draft solutions, such as service agents, product or, service experts. Be sure to emphasize the importance of the Title field in a solution record. This is a searchable field which appears on most lists and search windows for solutions. Therefore, service agents will use it to quickly identify appropriate solutions to their questions or problems.

When a new solution record is created, it has a status of Draft. Draft solutions are not available to be added to service request records and will not appear in the Search for Solution window until they are published. So, if an agent creates a Service Request and enters a draft solution during the call, the agent can add the draft solution to the Service Request, but the draft solution will not be accessible to other agents until it is published.

### 3 – Review, Approve, and Publish Solutions

The approval process ensures that your identified experts get a chance to review all solutions before releasing them for general use by your service agents. Establish review and approval guidelines to ensure that all solutions are valid, easy to follow, and consistently useful to those who need them.

You must have a role with the Publish Solutions privilege to change a solution status to Approved and to publish the solution. For more information, see [Approving and Publishing Solutions](#) (on page 221).



## 4 – Rate Solutions

Ask your service agents to rate the solutions that they use and add to their service request records. They can easily do this from the Solution Detail page by clicking the Rate Solution button. Solutions are rated on a 1 – 5 scale. If the solution was highly effective, rate it a 5. If it was not effective or valid, rate it a 1.

Every time a solution is rated, its rating score is recalculated and displayed on the record. Having your agents rate the solutions gives you information you can use to monitor the quality of your knowledge base. For more information, see [Rating Solutions](#) (on page 221).

## 5 – Monitor Solutions

Make sure that you regularly monitor your solutions knowledge base so that your service agents have the best and most current information and instructions. Some recommendations are:

- Assign an owner for certain areas or types of solutions and have each owner regularly review and update those solutions. Make each owner responsible for the accuracy and approval of his or her area.
- Over time, your solutions can become obsolete. Solutions related to products that are no longer supported are just one example. Create a Solution list to locate these solutions, filtering by the Product field, for example. Then, use the Mass Update feature to remove them from the searchable solutions.
- Do not delete a solution, unless it is a duplicate. Instead, set the status to Obsolete. Obsolete solutions no longer appear on the list when searching for a solution to add to a service request. However, you can still use the lists on the Solutions Homepage to access them if you need them.
- Review all solutions that are rated low. To find them, create a custom list that shows you all published solutions rated a 1 or 2.
- Use the prebuilt Solution lists on the Solutions Homepage to review your top-rated solutions and most active solutions. By doing so, you have an indication of any areas where you can potentially add more knowledge and expand your library.
- Routinely analyze your closed service requests for trends, and identify key problem areas where additional information should be added to your knowledge base.

## Solution Homepage

The Solution Homepage is the starting point for managing solutions. This page provides a window to solution information relevant to you and contains several sections.

### Solution Lists Section

The Solution Lists section shows this information:

- **Solution Lists.** The first 10 filtered lists. Filtered lists are subsets or groups of solutions that allow you to limit the number of solutions to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the Solution Homepage, click any list. Then, on the Solution List page, click the drop-down list to see all the available lists, and make your selection.

The following table describes the standard lists.

Solution List	Filters
All Recently Created Solutions	All solutions, sorted by the created date
All Recently Modified Solutions	All solutions, sorted by the modified date
All Solutions	All solutions, sorted alphabetically on Solution Title
Approved Solutions	Status = Approved
Draft Solutions (visible only to users with the Publish Solutions privilege)	Status = Draft
Published Solutions	Published = Y
Highest Rated Solutions	Highest cumulative ratings given by all individuals
Most Active Solutions	Frequently linked with Service Requests

For information on viewing or creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or view, edit, or delete an existing list. The list of filtered lists on the Manage Lists page includes the standard lists, although you cannot edit or delete them (you can only view them).

## Recently Created Solutions Section

The Recently Created Solutions section shows this information:

- **Recently Created Solutions list.** List of the most recently created solutions.
- **Show Full List.** Link for expanding the list of recently created solutions.

## Most Active Solutions Section

The Most Active Solutions section shows the solutions that have been frequently linked with service requests. High usage can indicate to a service organization the specific areas where customers are being challenged by product and services. Organizations can respond by providing more information to service representatives to help customers or by providing more information to customers directly.

## Highest Rated Solutions Section

The Highest Rated Solutions section lists the solutions with the highest cumulative ratings given by all individuals.

# Steps for Solutions

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32)
- [Updating Record Details](#) (on page 48)
  - NOTE:** To update solution records, your user role must include the Publish Solutions privilege.
- [Linking Records to Your Selected Record](#) (on page 49)
- [Attaching Files and URLs to Records](#) (on page 74)
- [Reviewing Solutions](#) (on page 220)
- [Working with Lists](#) (on page 56)
- [Rating Solutions](#) (on page 221)
- [Approving and Publishing Solutions](#) (on page 221)

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

### Related Topics

Solution Fields	223
Solution Homepage	218
About Solutions	215
Reports	361
Importing Your Data	749

## Reviewing Solutions

You can review the most active solutions or the highest rated solutions. You can also review the complete information for any solution record.

### *To review the most active solutions*

- 1 From any page, click the Solutions tab.
- 2 In the Most Active Solutions section, click the Solution Title link for the solution you want to review.

### *To review the highest rated solutions*

- 1 From any page, click the Solutions tab.
- 2 In the Highest Rated Solutions section, click the Solution Title link for the solution you want to review.

### *To review solution information*

- 1 Select the solution.  
For instructions on selecting solutions, see [Finding Records](#) (on page 35).
- 2 On the Solution Detail page, you can review the solution record.  
For a description of fields, see [Solution Fields](#) (on page 223).

## Approving and Publishing Solutions

**Before you begin.** To perform this procedure, your user role must include the Publish Solutions privilege.

You can review solutions for accuracy and completeness. Then you can approve the draft and publish it internally. Publishing a solution internally makes it available for all customer service representatives to use and link to service requests.

### *To approve and publish a solution*

- 1 From the Solutions Homepage, click the Draft Solutions link.
- 2 From the Solutions List page, select the solution and then click Edit.
- 3 On the Solution Edit page, change the Status to Approved to approve the solution.
- 4 To then publish the solution, select Y or N from the Published drop-down list.
- 5 Save the record.

## Rating Solutions

You can rate the effectiveness of a solution as many times as you want to.

### *To rate solution information*

- 1 Select the solution.  
For instructions on selecting solution, see [Finding Records](#) (on page 35).
- 2 In the Solution Details title bar, click the Rate Solution button.
- 3 On the Solution Rating page, select a rating from 1 to 5 (5 is the best) from the drop-down list.
- 4 Save the record.

Individual user ratings are averaged to determine which solutions appear in the Highest Rated Solutions section on the Solutions Homepage.

## Solution List Page

The Solution List page shows the subset or list of solutions you selected in the Solution Homepage. From the Solution List Page, you can review multiple solutions at a glance.

Using the drop-down menu, you can also switch to another solutions list. The drop-down list contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table in [Solution Homepage](#) (on page 218).

The following table describes what you can do from the Solutions List Page.

To do this	Follow these steps
Create a new list of Solutions	On the Solutions List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Create a solution	Click New Solution in the Solution List title bar. On the Solution Edit page, enter the required information and save the record.
Export the list	On the Solutions List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a solution	Click the Title column header to sort the data. Then click a letter in the alphabet bar. For solutions beginning with numbers, click 0-9.
Manage all the Solution lists	On the Solutions List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Solutions List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show the key information and filter information for the list	On the Solutions List title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> (on page 65).
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a solution	Select the Edit link next to the Solution title. On the Edit page, update the solution and save the record.
View a subset of solutions	Click the drop-down list in the Solution List title bar and change the selection to the appropriate subset.
View all solutions	Click the drop-down list in the Solution List title bar and change the selection to all the solutions.

## Solution Fields

Use the Solution Edit page to add a solution or update details for an existing solution. The Solution Edit page shows the complete set of fields for a solution.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Solution Detail Information</b>	
Solution ID	Unique ID of the solution. System-generated.
Title	Solution title. This field has a limit of 100 characters and is required.
Status	Solution's status, such as Draft, Approved, or Obsolete. Defaults to Draft. Only users with the Publish Solutions privilege can change this information.
Published	Indication that the solution is available for internal use. Only users with the Publish Solutions privilege can change this information.
Solution Rating	Rating of the solution from 1 to 5 (5 is the best).
Created By	Alias of the person who creates the solution record followed by the date and time it occurs. System-generated.
Modified By	Name of the person who creates or updates the solution record followed by the date and time it occurs. System-generated.
<b>Additional Information</b>	
FAQ	Frequently asked questions that capture the solution topic.
Solution Details	Additional information about the solution.

### Related Topics

Steps for Solutions 219





# 11 Communications

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Use the Communication pages together with the Communication Tools and Voice Controls sections in the Action bar to manage customer interactions—phone calls, voicemail messages, and emails. Supervisors can also monitor agents, using these same areas of the application.

**NOTE:** Your company administrator determines which tabs are available to you. If your job responsibility does not include using Call Center On Demand, this tab might be excluded from your setup.

## About Call Center On Demand

Call Center On Demand allows you to use voice, voicemail, and email to manage customer interactions. Because of its integration with Siebel CRM On Demand, each customer interaction is tracked and stored in the same location that your company uses to manage its contacts, accounts, solutions, and so on. This integration allows you to leverage the information in your company's database to find solutions to customer issues, update contact information, and run analytics against your data.

Call Center On Demand is a Web-based call center that uses these channels:

### ■ Voice

Call Center On Demand allows you to establish real-time voice communication and uses skills based routing to forward calls to the appropriate agent. The call controls built into the interface allow you to receive calls, place outbound (external) calls and internal (agent-to-agent) calls, place a call on hold, hang up (close) a call, transfer a call, and conference in other parties. The feature includes these capabilities:

- **Inbound calls.** Receive and work with an inbound call through the Call Center On Demand interface anywhere there is a touch-tone telephone, provided you are logged in to the application.
- **Outbound calls.** Call Center On Demand supports outbound dialing to U.S. (domestic) and international locations. Calls can be placed from the Call Center On Demand toolbar.
- **Call Control.** All calls are handled through the Communication Tools and Voice Controls sections in the Action bar, and the Calls subtab on the Communications Homepage. Other information passed with the call (for example caller name, telephone number, and 800 destination) is only displayed if configured.

- **Internal calls.** Contact another agent or supervisor logged into Call Center On Demand by selecting the desired agent or supervisor from a drop-down list of active users.
- **Skills-based Routing.** Voice calls are routed to the most qualified agent to handle the call (that is, defined by customer touch-tone selection through IVR).
- **Statistics Window.** Provides real-time statistics on call progress in the Call Center On Demand application. The window displays the current state, the time in the state, the number of calls in the queue, and the call that has been waiting in the queue the longest.
- **Click-to-Dial.** Outbound calls are placed by clicking the phone number link in the Details or List pages.
- **Supervisor Control.** Supervisors can record and listen to previously recorded phone calls for quality assurance purposes. In addition, supervisors can monitor agents real-time and invoke actions such as whisper, coach, join, take over, and log agents out.
- **Voicemail**

Call Center On Demand's voicemail channel uses skill-based routing to forward messages to the appropriate agent. Each Call Center On Demand company defines when and how voicemail is offered to a caller. Applying Call Center On Demand's intelligent routing supports rapid response to callers who choose to leave a voice message with the same quality and priority as regular telephone calls. Agents can listen to the caller's message and reassign it to another agent or workgroup, if necessary. You can access the voicemail through the activity record, even after it is wrapped up. Voicemails can be played back on a local media player or on a phone.
- **Email**

Emails are routed to an agent's email, according to keywords in the email or the agent's skills. Emails can be responded to, discarded, and reassigned to another agent or workgroup. Agents are given limits on the number of emails they can work on at a time. To review these limits, the agent can click Statistics in the Action bar and review the Offline Messages line.

### About IVR

Underlying the Voice and Voicemail channels is Interactive Voice Response (IVR). IVR uses underlying touch-tone recognition and Call Center On Demand skill-based routing.

Touch-tone recognition permits the IVR to answer a call, play a prerecorded message, and prompt the customers to indicate the nature of their query and route them to an appropriate agent (for example, by pressing 1 for Sales).

## About Matching Records in Call Center On Demand

When an agent receives a communication from a customer, Call Center On Demand does the following:

- 1 Searches existing records in the Siebel CRM On Demand database to match Contact, Lead, Account, Service Request, and Campaign records.

For phone calls, the application looks for matches based on:

- Originator phone number (which phone number the customer is dialing from). This information is captured in the Origin field.

For emails, the application looks for matches based on:

- Originator email address. This information is captured in the Origin field.

**NOTE:** For campaign records to include the phone numbers and email address fields, which are the ones used to determine matches, your company administrator must add these fields manually to the Campaign Edit pages: Campaign Email, Campaign Phone #. For instructions, see [Customizing Static Page Layouts](#) (on page 570).

- 2 If a single match is found, the matching record appears.

If multiple matches are found, the application doesn't link the activity to a specific record. You need to do that manually.

- 3 An activity record is created for the communication, which is linked to the matching record.

**NOTE:** If an agent transfers a call to another agent, an Activity will be created for the agent to whom the call is transferred.

## Managing the Call Center

As a supervisor, you need tools and information to help you operate your call center effectively. You need to know how many calls, emails, and voicemails your team handles. You need to ask the following questions: what is the average handle time for each interaction: how long are customers waiting in the queue: and so on. Access to real-time information about your operations can help you to manage your call center and even pinpoint improvement opportunities for individual agents.

## Call Center On Demand Supervisor Tools

Siebel CRM On Demand and Call Center On Demand have several tools to help you manage your call center. Every customer communication can be tracked and linked to customer records. This tracking feature builds a database of information about your operations and your customers, which you can access using reports and analyses. Agent-monitoring tools can also help you to coach individual agent performance.

## Communications Dashboard

The Communications Dashboard shows real-time statistics about your call center queues to help you analyze performance.

- Click the Dashboard tab and select the Communications dashboard from the drop-down list. Click Show.
- View the current number of customer interactions in each of your communication channels.
- Review individual workgroup statistics to help you analyze your call center volumes and manage your workforce.
- Click the Additional Reports link to select a different dashboard to view other service or sales analyses.

## Communications Reports and Analyses

The Reports Homepage contains links to prebuilt and custom-built analyses that can help you manage your call center. Review custom and prebuilt analyses regularly to identify call center trends, potential risks, and opportunities for improvement.

You can use On Demand Answers to design customized reports to analyze the communications activities generated by your call center interactions. When you create a custom analysis:

- Use the Activities reporting subject area to build a communications-specific analysis.
- Expand the Activity folder, and then the Communication folder.
- Click Add Columns to add Call Center On Demand data columns to your custom analysis.

For further information, see [About Reports](#) (on page 362).

## Communication Homepage

The Communication Homepage is the starting point for managing customer interaction. This page provides a window to information relevant to you and contains several sections:

### Inbox Section

The Inbox section lists all customer interactions currently assigned to you for the channel you have chosen in the sub tabs (Calls, Voicemail, or Email). For a description of the fields (columns), see [Wrapping Up Communication Activities](#) (on page 241).

## Communications Lists Section

The Communications Lists section displays this information:

- **Communications Lists.** The first 10 filtered lists. Filtered lists are subsets or groups of customer interactions (activities) that allow you to limit the number of communications to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You will see all Activity Lists, including Calendar Lists.

The following table describes the Communication standard lists.

This Activities List	Displays
All Aging Emails	All emails you can see that have been open longer than 24 hours.
All Aging Voicemails	All voicemails you can see that have been open longer than 24 hours.
All Callbacks	All web callbacks and callbacks you can see.
All Emails	All emails you can see.
All Inbound Calls	All inbound calls you can see.
All Inbound Emails	All inbound emails you can see.
All Outbound Calls	All outbound calls you can see.
All Outbound Emails	All outbound emails you can see.
All Transfers	All transfers you can see.
All Voice Calls	All phone calls.
All Voicemails	All voicemails.
All Web Callbacks	All Web callbacks you can see.
My Communications Inbox	All customer interactions currently assigned to you. No new, uncompleted emails appear in this list.
My Calls Inbox	Incomplete calls assigned to you.
My Voicemails Inbox	Incomplete Voicemails assigned to you.
Recently Completed Communications	All communications you have recently completed.
Recently Completed Calls	Calls you have recently completed.
Recently Completed Emails	Emails for which you have sent a reply.
Recently Completed Voicemails	Voicemails you have recently completed.

For information on creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or delete one. The list of filtered lists on the Manage Lists page includes the standard ones, however you cannot edit or delete them. However, those standard lists appear in the drop-down list on the Activities Lists page.

### Recently Completed Communications Section

The Recently Completed Communications section lists your most recently completed interactions. For a description of the fields (columns), see [Wrapping Up Communication Activities](#) (on page 241).

- **Show Full List.** Link for expanding the list of most recently completed communications. This displays a full page of records which you can scroll through page by page.

#### Related Topics

About Call Center On Demand 225

Steps for Call Center On Demand 230

## Steps for Call Center On Demand

Click a topic to see step-by-step procedures to do the following:

- [Preparing for Interacting with Customers](#) (on page 231)
- [Handling Phone Calls](#) (on page 233)
- [Disabling the Communications Toolbar](#) (see "Disabling the Communications Toolbar in a Browser Session" on page 236)
- [Placing Calls](#) (on page 236)
- [Handling Callbacks \(Web and Phone\)](#) (on page 238)
- [Handling Voicemail Messages](#) (on page 238)
- [Handling Emails](#) (on page 239)
- [Wrapping Up Communication Activities](#) (on page 241)
- [Reviewing Your Statistics](#) (on page 242)
- [Viewing Interaction Histories](#) (on page 244)
- [Monitoring Agents](#) (on page 244)

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Preparing for Interacting with Customers

The following topics contain step-by-step procedures used in preparing to interact with customers.

### Accessing Call Center On Demand

When you sign in to Siebel CRM On Demand, the Communications tab should appear along with Accounts, Contacts, and so on. If it does not appear, do the following:

- Click the arrow to the right of the row of tabs, and select Communications from the drop-down list.

**NOTE:** If Communications doesn't appear as an option, you might have to add the tab to your layout or contact your company administrator. For instructions on displaying tabs, see [Displaying Your Tabs](#) (on page 316).

### Updating Your Phone Number

When you want to receive phone calls at another location, be sure to update your phone number. The phone number that you enter is the one where the application directs your phone calls.

#### *To update your phone number*

- 1 In the Communication Tools box in the Action bar, click User Preference.
- 2 In the Configuration window, update the Phone Settings:
  - **SIP Address.** Protocol standard for receiving VoIP phone calls. Update this field if your company uses SIP-based VoIP.
  - **Outside Phone (Remote Extension).** Phone number where Call Center On Demand routes your incoming calls. You can update this phone number at any time.
  - **Play Announcement.** Prompts you to press a digit (DTMF key) before having the call passed to you.

**TIP:** If you work from home, you might want to select this option. This option prevents other people, such as children, from accidentally picking up a phone call routed from the call center.

- 3 Click OK to close the Configuration window.

The new settings take effect immediately.

## Setting User Preferences

To change your personal greeting, work off hook, and change other phone-handling behavior, you need to update your user settings.

### *To set your user preferences*

- 1 In the Communication Tools section in the Action bar, click User Preference.
- 2 In the Configuration window, select the General Phone and Voicemail Prompt settings you want:

Setting	Description
<b>General Phone</b>	
Incoming Call Screen Pop	Automatically opens the Service Request, Contact, Lead, Account, or Call Detail page when you answer a phone call.  The application searches the Siebel CRM On Demand database for existing records that match the caller's phone number. If one match is found, the matching record appears (Service Request, Contact, Lead, or Account record). The Call Detail page appears in other cases (no match, multiple matches).
Work Off Hook (Disable Dial Tone)	Keeps your line open after the first call is taken so that you do not have to pick up your phone to answer it. Instead, you can use the Voice Controls section in the Action bar to answer the phone.
Automatic Call Acceptance	(Available only when working off hook) Automatically accepts the inbound call so callers are connected without you taking any additional steps.
Phone Settings	For information on the Phone Settings options, see "Updating Your Phone Number", above.
<b>Voicemail Prompt</b>	
Agent Name Prompt Wav File	Recording that states your name.
Voicemail Greeting prompt Wav File	Recording that plays when a call is routed to your voicemail.
Welcome Prompt Wav File	Recording that plays when a customer is routed to your phone number.
Record a personalized prompt	Records your personal message. This prompt is used to automatically greet callers when the Play Greeting feature is activated by your Administrator.



## Checking Your Call Center On Demand Inbox

Inbox (on the Communication tab) section lists the channel-specific interactions still in progress that have been assigned to you within the chosen sub tab (Calls, Voicemail or Email). Call Center On Demand considers these communications active until the following occurs:

- **Phone calls.** They are wrapped up when the call is terminated. The wrap up form automatically displays the status to Completed. To apply the Completed status to the activity, click Save in the wrap up screen. To leave the activity in the In Progress state, click Cancel.
- **Voicemails.** You must manually select Wrap Up after you listen to a voicemail. The wrap up form automatically displays the status as Completed.
- **Emails.** You can reply, reassign, or discard email (junk mail, for example). When you reply to an email, the automatically pops a Wrap Up window that allows the agent to include additional information in the Completed Email Activity.

After the email is reassigned, or after the system automatically reassigns an email because an agent did not respond quickly enough, the email no longer appears in the agent's Inbox.

**NOTE:** Email Activities are not saved in CRM On Demand until they are replied to and wrapped up with a status of Completed.

## Making Yourself Available

For you to receive new call and voicemail interactions, your status must be Available. You can receive email interactions when your status is Available or Unavailable. Depending on how your administrator has set it up, your status might change to Available as soon as you sign in to the application. If not, you need to manually set your status to Available.

When your status is Available, you can:

- Receive one or many types of new customer communications assigned to you (phone calls, emails, voicemails). The type and number of communications depends on the settings your administrator configured.
- See data pertaining to the inbound interactions displayed in the Action bar.

### To make yourself available for phone calls

- In the Communication Tools section in the Action bar, click Unavailable.

The status changes to Available.

## Handling Phone Calls

When you become available for work, you can start taking phone calls from customers. Depending on your company's routing, you will receive calls based on your skill set, workgroup, or other criteria.

In addition, the application searches for matching records for the phone call and displays the matching record. If no existing records—or multiple records—match the incoming phone call, the Call Detail window appears. For more information on this sequence, see [About Call Center On Demand](#) (on page 225).

If you change your status to Unavailable, you can still be assigned emails. No other communications such as phone calls, voicemails can be assigned to you. You can make yourself unavailable while you do other work, such as completing or cleaning up existing messages.

### ***To take a phone call***

- When a new communication is assigned to you, answer the phone.

If you are configured for screen popup, the application displays the matching record, based the caller's phone number.

If you are not configured for screen popup, you must click the blinking Inbound Call alert in the Communication Toolbar.

When you accept the call, the call controls become active.

### ***To hang up***

- Hang up the receiver, or click Hangup in the Voice Controls section in the Action bar.

After the call ends, the Wrap Up form appears for you to track information about the call. Your Administrator may set a time-based wrap up, allowing you to complete work after the call. If the interaction is complete and you want to wrap up the call before the time limit expires, click the End Wrap Up button on the Communications Toolbar. For more information, see [Wrapping Up Communication Activities](#) (on page 241).

### ***To place a call on hold***

- In the Voice Controls section in the Action bar, click Hold at any point during the call.

Placing a call on hold allows you to park the call and pause voice communication with the caller. You can see the status of the call (that is, 'On Hold') in the Action bar.

### ***To resume voice communication***

- Click the Hold button.

### ***To transfer a call***

- 1 In the Voice Controls section in the Action bar, click Transfer.
- 2 In the drop-down window, select the option you want.

- 3 In the Transfer window, do one of the following, according to your previous selection:

For this option	Follow these steps
Agent	<p>1. Select an agent.</p> <p><b>TIP:</b> To find the agent in the list, use the Search for an Agent field.</p> <p><b>NOTE:</b> A call transfer to an agent does not require that the agent be signed in to the application or be available for calls.</p> <p>2. Click one of the buttons:</p> <ul style="list-style-type: none"> <li>■ <b>Blind Transfer.</b> Transfers the call to another agent, disconnecting you from the call.</li> <li>■ <b>Announced Transfer.</b> Transfers the call, allowing you to announce the call to the agent who answers. The customer does not hear the announcement.</li> <li>■ <b>Conference.</b> Transfers the call, keeping you and the customer on the line while another person joins the call.</li> </ul> <p><b>TIP:</b> You can double-click the agent name to transfer the call as a blind transfer.</p> <p>3. If the agent does not answer, you can click Abandon Transfer in the Voice Controls section at any time. This puts the customer on hold and returns the control to you. To reconnect with the caller, click the Hold button.</p>
Group	<p>Select the Skill Group from your company list of groups and click Transfer, or double-click the group name.</p> <p>A call transfer to a skill group does not require that any agents be signed in.</p> <p><b>TIP:</b> To find the group in the list, use the Search for an Agent field.</p>
Phone	<p>4. Enter the telephone number in the available field.</p> <p>This might be a telephone within the company or outside of the company.</p> <p>5. Click Conference, Announced Transfer, or Blind Transfer to complete the transfer.</p>
Voicemail	Sends the call to the agent's voicemail.

- 4 Enter information in the Wrap Up form.

**NOTE:** When you transfer a call, the call between you and the caller ends, prompting the Wrap Up form to appear.

### *To reconnect with the caller*

- Click the Abandon Transfer button and then click the Hold button.

**NOTE:** This option is available for announced transfers or conference transfers.

## Disabling the Communications Toolbar in a Browser Session

If you are using multiple browser sessions in CRM On Demand to talk simultaneously to a customer and add details to a form, such as a Service Request, you can disable Communications Tools in one CRM On Demand browser session. This feature allows you to save the details that you are entering in the form. In the second CRM On Demand browser session, you can use Communications Tools to manage customer communications.

**NOTE:** The disabled Communication Tools remain disabled in the browser session until you sign out and then sign in again to CRM On Demand. It is not necessary to close the browser window.

### *To disable Communications Toolbar in browser session 1*

- 1 From the Action bar, click the X button on the Communications Toolbar section title bar.

**TIP:** Move the pointer over the button to see a ToolTip that displays information about the button's functionality.

When the Disable Communications Toolbar button is clicked, a confirmation request appears.

- 2 Click OK to disable the Communications Toolbar.

**NOTE:** If you disable the Communications Toolbar, you cannot use the Discard, Wrapup, Reassign and Open Email buttons, or CCOD Attachments from the browser session. You can sign in again to CRM On Demand to enable the Communications Toolbar.

## Placing Calls

From Call Center On Demand, you can place external calls to customers or internal calls to another agent or supervisor.

By default, each agent has two separate phone lines, allowing you to receive an inbound call on one line and make an outbound call on a second line. For example, your customer might need information that you cannot supply. You can place the customer on hold, click the second line to begin using it, click Dial, and call someone else for the information you need. When you receive the information, you can end the second call and return to your customer on the first line.

Placing an external call automatically creates an activity record within Siebel CRM On Demand for the call, unless you clear that option before dialing each call. Logging the outbound call activity saves you time tracking your daily activities, and allows managers to measure each agent's productivity.

### *To place an external call*

- 1 In the Communication Tools section in the Action bar, click Dial.

**NOTE:** By default, the Log an Activity check box is selected.

- 2 Then you can do one of the following:

- Select a number from the Recently Dialed list, and click Call.

**NOTE:** These recently dialed numbers pertain to the current session. When you sign out, the list is cleared.

- Enter the phone number, and click Call.

- Click the Search Agents button, select the Agent from the list, and click Dial.

**TIP:** To find the agent in the list, use the Search for an Agent field.

- 3 Answer your phone.

Call Center On Demand then calls the destination phone number you entered.

### *To place an external call using Click-to-Dial*

- 1 Navigate to a contact's details on a Contact Details or a Contacts List page.

If the contact's number is displayed as a hyperlink, you can click on it to dial the number.

**NOTE:** System Administrator's can customize your system and change fields and their characteristics. Click-to-Dial may not work with such fields.

- 2 Click the phone link you wish to dial.

A Dialler dialog box appears on screen.

**NOTE:** The telephone number in this dialog box is read-only. To disable this dialog box, navigate to My Setup > Personal Profile > My Profile and unselect the Display Click-to-Dial Popup check box. You need to log out and login again for this change to take effect.

- 3 Click the Call button to place the outbound call.

Call Center On Demand then calls the destination phone number you clicked.

### *To place an internal call*

An internal call can be placed to any agent or supervisor. Their status is displayed in the list of users along with their name and target telephone number (that is, current location). A call placed to an agent rings that agent's telephone, regardless of the agent being logged in or not.

## Handling Callbacks (Web and Phone)

Call Center On Demand provides Web Callback and Callback capabilities, which must be set up by the administrator:

- **Web Callbacks.** Customers access a form on the company Web site to request a callback.
- **Callbacks.** Customers schedule a callback through the phone menu when they contact the call center.

When a request for a callback is submitted through either the Web page or phone menu, the callback is routed to the best suited available agent. That agent sees a flashing alert, and the call buttons become activated.

### *To accept a callback*

- Click Answer when you see the alert notification in your Action bar.

Accepting the callback passes the call to you. Your phone rings, and when you answer it, the call is made to the requesting party.

**NOTE:** For Web callbacks, no screens pop up. Also, activity records are not automatically linked to existing records.

## Handling Voicemail Messages

Voicemail messages can be either personal or ACD messages. ACD messages are voicemails left for your company call center. Those voicemail messages are routed according to the call flow set up by your administrator and are assigned to agents based on their skill and availability.

You can reassign a voicemail message to another agent, supervisor, or a skill group. When you reassign a voicemail, it goes through the routing again, according to the workflow your administrator set up. Reassigned voicemails are no longer owned by you.

When a voicemail message is in your queue, the Inbound Voicemail alert flashes in the Communications Tools section in the Action bar for a few seconds. The record also appears at the top of your Inbox on the Communications Homepage, within the Voicemail subtab.

You can play a voicemail message at any time. Playing a message does not affect your availability in the application.

**NOTE:** Voicemail messages cannot be deleted.

***To listen to a message (new or played)***

- 1 In the Inbox, click the Subject link for the voicemail message.
- 2 On the Voicemail page, click the Listen to Vmail button.  
This plays the voicemail through the local media player.

***To listen to a message on the phone (new or played)***

- 1 In the Inbox, click the Subject link for the voicemail message.
- 2 On the Voicemail page, click the Listen to Vmail on Phone button.  
The agent's phone rings and plays the voicemail through the phone.

***To reassign the voicemail***

- 1 On the Voicemail page, click Reassign.
- 2 Click Agent or Group in the window that appears.
- 3 In the Transfer window, select a group or agent.
- 4 Click Transfer.

## Handling Emails

Emails are routed to agents based on skill, availability, or keyword. When an email has been routed to you, the Incoming Email alert flashes in the Communication Tools box in the Action bar. The record also appears at the top of your Inbox on the Communications Homepage, within the Email subtab.

Generally, you want to respond to all emails. However, when you receive email, such as junk mail, which does not warrant a reply, you can discard it. Discarding wraps up the email without a response and no completed Email Activity is created. You can save incomplete emails by clicking Save As Draft. These are saved to the Drafts folder. You cannot edit discarded and sent emails.

Your administrator also configures the settings for the maximum number of emails you can receive. You can see that information by looking at the Offline Messages line in the Statistics window, shown as x/y. x is the number of messages currently assigned to you. y is your allowed limit.

### *To read a new email*

To access your new email, you can do either of the following:

- Click the Incoming Email alert in the Communication Tools section in the Action bar.  
This automatically opens the Email subtab in the Communications Homepage.
- Navigate to the Email subtab on the Communications tab.

This displays a list of new email assigned to you.

- 1 Click the Subject Link of the email you want to review.
- 2 The email content is displayed in the New Email Details window:
- 3 On the Email Details window you can do the following:
  - **Reassign.** Resends the email to the same workgroup so that it can be reassigned to another agent.
  - **Discard.** Removes the email from the Inbox.  
This is usually used for junk or unwanted emails.
  - **Save as Draft.** Saves the email in the draft email list within my Email section.
  - **Reply.** On replying to an email, a wrap up screen appears. Enter the appropriate wrap up details and click Save.  
  
The activity is now recorded in the Recently Completed Emails section of your Communication home page. Also, if the email was related to any records you can access the email from the object's interaction history.  
  
Both the original email and the response are captured within the interaction history.

### *To read draft, sent and discarded emails*

- 1 Click the Email subtab in the Communications Homepage.
- 2 In the My Emails section, locate the email you want to review from the drop-down menu:
  - Draft Messages
  - Sent Messages
  - Discarded Messages

This displays a list of emails for the selected folder.

- 3 Click the Subject link for the email you want to review.  
The email content is displayed in the Email Details section.

**NOTE:** The Outbound Email activity is saved as a separate activity record. If the Outbound Email activity is linked to a contact, account, and so on, the activity record also appears in the contact or account's related information section. CRM On Demand creates only completed Email Activities in Sent Messages.



## Wrapping Up Communication Activities

When you hang up after a phone call, or when you reply to an email, the application automatically opens the Wrap Up form, depending on your configuration. For voice mails, you must manually open the Wrap Up form to complete the communication activity.

In the Wrap Up form, you can summarize what occurred during the communication. You can also link other records to the activity, such as accounts and contacts, in the Wrap Up form. Linking records creates a historical audit of all communications between your company and a contact or account. You can also track all communications required to resolve a service request or all communications generated by a specific campaign, which helps your company measure overall campaign effectiveness.

The following table describes some fields in the Wrap Up form.

Field	Description
<b>Key Task Information</b>	
Owner	Alias of the record owner. Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.  This value affects which records are included in reports you or your managers run, as well as visibility in managed lists.
Subject	Default is the Activity Subtype followed by the phone number or email address.
Priority	Priority for this activity, as determined by your company setup. Read-only field.
Origin	Phone number or email address from which the call is made or the email address sent. Read-only field.
Destination	Phone number that the customer dials or target email address for the email. Read-only field.
Status	Defaults to Completed in the Wrap Up form. If you save the information with a status of Completed, the activity appears in the Recently Completed Communications section on your Communications Homepage.
Type	Activity type as defined at your company. Read-only.
Activity Subtype	Specific activity type. You cannot edit these values; only your company administrator can change or add values to the drop-down list.  Default values are Inbound Call, Outbound Call, Inbound Transfer, Outbound Transfer, Missed Transfer, Inbound Email, Outbound Email, Forwarded Email, Reassigned Email, Email Response, Inbound Voicemail, Outbound Voicemail, Forwarded Voicemail, Reassigned Voicemail, Callback, and Web Callback.

Field	Description
Resolution Code	<p>Short description of how this call is resolved.</p> <p>Default values are Bad Number, Busy, Call Back, Customer Update, Discarded Email, General Question, Literature Request, New Account, New Contact, New Lead, New Opportunity, New Service Request, No Answer, Not Interested, Outside Transfer, Other, Product Question, Reassigned to Agent, Reassigned to Group, Response Given, Scheduled Follow Up, Transferred to Agent, Transferred to Group, and Transferred to Voicemail.</p> <p>Your company administrator can change or add values to the drop-down list.</p>
<b>Related Items</b>	<p>Records linked to the activity. Call Center On Demand automatically links records when the activity is created based on information captured by the application, such as origin, destination, and other caller entered digits.</p> <p>You can also create new records that are automatically linked to this activity or select existing ones to link. Click the Lookup icon next to the record type. On the Search page, select the existing record or click New, enter the required information on the Edit page, and save the record.</p>
<b>Additional Information</b>	
Modified By	Name of the person who creates or updates the record followed by the date and time it occurs. System-generated.
Description	Additional information about the call. Limit of 2,000 characters.

## Reviewing Your Statistics

You can review statistics by clicking Statistics in the Communication Tools section in the Action bar. The statistics represent activity in the last 24 hours for you or your workgroup, as indicated in the following table. Statistics are reset to zero (0) at midnight, company time.

This label	Shows this information
<b>Session</b>	
Last Update	Last time statistics were updated (agent-specific)
Logged in for	Login duration time (agent-specific)

This label	Shows this information
Talk Time	<p>Duration of the talk time for all the agent's phone interactions.</p> <p>Example:</p> <ul style="list-style-type: none"> <li>■ 4 calls <ul style="list-style-type: none"> <li>■ 1 ACD Call: 30 minutes talk time</li> <li>■ 1 Outbound call: 10 minutes</li> <li>■ 1 Inbound call: 14 minutes</li> <li>■ 1 Web Callback call: 15 minutes</li> <li>■ Talk time is 69 minutes</li> </ul> </li> </ul>
Time to Answer	<p>Average time to answer for all types of interactions for all the workgroups that the agent is assigned to.</p> <p>Example:</p> <ul style="list-style-type: none"> <li>■ Agent is member of workgroup 1, 2 and 3: <ul style="list-style-type: none"> <li>■ Average time to answer for workgroup 1: 2 minutes</li> <li>■ Average time to answer for workgroup 2: 4 minutes</li> <li>■ Average time to answer for workgroup 3: 6 minutes</li> <li>■ Average Time to answer: 4 minutes</li> </ul> </li> </ul>
Offline Messages	Number of emails in your queue or the number of messages you are set up to receive (agent-specific)
<b>Voice</b>	Number of calls taken by the agent. This is agent specific and does not include the workgroup totals.
# Calls in queue	Number of calls in the queue for all the workgroups that the agent is assigned to
Longest Wait	The longest time that a call has been in the queue. This period is calculated by including all the calls in all the workgroups that the agent is assigned to.
Current State	Indicates the state of voice calls, for example, Available, Unavailable, and so on.
<b>Voicemail</b>	Number of ACD voicemails taken by the agent.
# Vmails in Queue	Number of ACD voicemails in the queue for all the workgroups that the agent is assigned to.
Current State	Indicates the state of ACD voicemails, for example, Available, Unavailable, and so on.
<b>Email</b>	Number of ACD emails taken by the agent.

This label	Shows this information
# Emails in Queue	Number of ACD emails in the queue for all the workgroups that the agent is assigned to.
Current State	For ACD emails (agent-specific), for example, Available, Unavailable, and so on.

## Viewing Interaction Histories

Call Center On Demand tracks what happens to each customer interaction in a separate file, called an interaction history. Similar to a log file, the interaction history includes such information as the agent, priority, and routing for the voicemail. Interaction histories are stored as attachments to the activity records.

### *To see the interaction history*

- 1 Select the activity.
- 2 On the Detail page, scroll down to the Attachments sections.
- 3 Click View in the Interaction History row.
- 4 To see further details, click the specific link in the history.

For example, you can click this link to review the reply you sent to an email: Saving the transcript of the email reply.

## Monitoring Agents

**Before you begin.** To perform this procedure, you need to be set up as a Supervisor in Call Center On Demand.

You can use the monitor feature as a coaching tool to help agents best deal with customer issues. When you monitor an agent, they do not know when you are listening to their communications. During the session, you have the option to just listen or to take control of the call.

### *To monitor an agent's call*

- 1 In the Communication Tools section in the Action bar, navigate to Supervisor > Monitor.
- 2 In the Monitor Agent window, select the Agent Name.

**TIP:** To find the agent in the list, use the Search for an Agent field.

- 3 Select the monitoring or recording control for the current call:
  - **Listen.** You can hear the conversation, but neither the customer nor agent can hear you.
  - **Whisper.** You can hear the conversation and can coach the agent. The customer cannot hear you.
  - **Take Over.** You take control of the phone call with the customer. This disconnects the agent from the call and the Wrap Up form appears on the agent's screen.
  - **Join.** You join the conversation. Both the agent and customer hear you.
  - **Record/Stop Recording.** You record the conversation. When you stop recording, the wav file is stored as an attachment to this activity in the interaction history.
  - **Log Out Agent.** You sign out the agent from the application. Use this option for signing out remote agents that have left their workstation. When you select this option, a message appears asking you if you want to disconnect the channel. Selecting Yes disconnects the phone call the agent was on.

#### *To listen to an agent's recording*

- 1 In the Communication Tools section in the Action bar, click Supervisor, and select Recordings.

This displays the recordings made by the supervisor while monitoring an agent.

**NOTE:** Recordings made by the agent are available in the Interaction History.
- 2 In the Recordings window, select the recording.

**TIP:** To find the recording in the list, complete the User, From and To fields and click Search. You can also use the calendar icons to complete the From and To fields.
- 3 Select the recording control for the current recording:
  - **Play.** You can play the selected recording.
  - **Close.** You stop the recording and close the Recordings window.

## Communication Activities List Page (Call Center On Demand)

The Activities List page for Call Center On Demand shows the subset or list of customer interactions you selected in the Communication Homepage. From the Activities List Page, you can review multiple interactions at a glance. You can also select one to review or update.

Using the drop-down menu, you can also switch to another list. The drop-down list contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the Communications Lists Section table in [Communication Homepage](#) (on page 228).

**NOTE:** Activities include Appointments, Tasks, and Communication Activities. You cannot delete Call Center On Demand Activities from the Communications Tab, Calendar or Home pages.

The following table describes what you can do from the Communications List Page:

To do this	Follow these steps
Create a filtered list	Click the Manage Lists link in the title bar, and then click New List. This opens a wizard to guide you through the process.
Create a task record	Click New Task on the title bar. On the Task Edit page, enter the required information and save the record.
Find an activity	Click the Subject column header. Then click a letter in the alphabet bar. For activities beginning with numbers, click 0-9.
Page through the list	Click the Previous or Next links.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
View a different subset of activities	Click the drop-down list on the title bar and change the selection. The drop-down list contains all filtered lists available to you.
View activity details	Click the Subject for the activity you want to view. This opens the Detail page.
View all activities at your company	In the title bar, click the drop-down list and select an item.

## Call Center On Demand Toolbar

Call Center On Demand adds two areas to the Action bar: Communication Tools and Voice Controls. This table describes the options you might see in these two areas, depending on your responsibilities.

Button	Description
<b>Communication Tools</b>	
Available/Unavailable	Allows you to change your work status from either Available to Unavailable for accepting phone calls or not.
Dial	Allows you to place an internal call or outbound call.
Supervisor	Allows supervisors to monitor and record agent's calls and listen to Agent's recordings.
User Preference	Allows you to change the phone where you accept incoming calls as well as other settings.
Statistics	Tracks your session statistics. For more information, see <a href="#">Reviewing Your Statistics</a> (on page 242).

Button	Description
<b>Voice Controls</b>	Specific to each of the two phone lines in use.
Answer	Accepts callbacks (used when working On Hook),
Decline	Declines a callback or declines a call routed to you.
Hangup	Ends an active call.
Hold	Places a call on hold, which allows you to make an outbound call to an external source. Click this button a second time to return to the call.
Transfer	Transfers an active call to another agent, group, or external source.
Record	Records the active call, which is saved as a wav file and can be played on your local media player.

## Communication Activity Fields (Call Center On Demand)

When you click Edit from the Call, Voicemail, or Email Detail pages, the Activity Edit page opens with information carried over from the Wrap Up form for the activity.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table. Not all fields in the application are editable.

The following table provides additional information regarding some fields.

**NOTE:** All times are shown in number of seconds.

Field	Description
<b>Key Activity Information</b>	
Owner	See Owner in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
Subject	See Subject in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
Priority	See Priority in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
Origin	See Origin in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
Destination	See Destination in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).

Field	Description
Status	See Status in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
Type	See Type in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
Activity Subtype	See Activity Subtype in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
Resolution Code	See Resolution Code in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
<b>Key Statistics</b>	
Queue Hold Time	Time in seconds that the interaction is in the queue before it is assigned to an agent.
Start Time	Time, date and timestamp the communication is assigned to the agent.
End Time	Time, date and timestamp that the communication is wrapped up.
Total Hold Time	Time in seconds that the caller is selecting options from the menu prompts combined with queue hold time.
Assigned Queue	Name of group that the interaction is routed to.
IVR Time	Time in seconds the customer is selecting options from the menu prompts. For emails, this shows 0.
Interaction Time	Time in seconds between start time and end time.
Wrap Up Time	Time in seconds the agent spends in wrap up (with the Wrap Up form open).
Handle Time	Sum of interaction time and wrap up time.
Queue Hold Time	Time in seconds that the caller is on hold after entering IVR information.
<b>Related Items</b>	See Related Items in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
<b>Additional Information</b>	
Modified By	See Modified By in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241).
Description	See Description in <a href="#">Wrapping Up Communications Activities</a> (see "Wrapping Up Communication Activities" on page 241)s.



# Call, Voicemail, and Email Detail Pages

Click a topic to see instructions for doing the following from the Call, Voicemail, or Email Detail page:

- [Viewing Interaction Histories](#) (on page 244)
- [Linking Records to Your Selected Record](#) (on page 49)
- [Attaching Files and URLs to Records](#) (on page 74)

Related Topics	
Communication Activity Fields (Call Center On Demand)	247
About Call Center On Demand	225



# 12 MedEd

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Use the MedEd pages to plan and track medical education events. A medical education event can be as simple as a lunch-and-learn session in a physician's office or as complex as a seminar series or national sales meeting.

**NOTE:** Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking MedEd events, the MedEd tab might be excluded from your setup.

## MedEd Homepage

The MedEd Homepage is the starting point for managing MedEd events. This page provides a window to event information relevant to you and contains several sections.

### MedEd Lists Section

The MedEd Lists section shows this information:

- **MedEd Lists.** The first 6 filtered lists (by default). Filtered lists are subsets or groups of events that allow you to limit the number of events to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the MedEd Homepage, click any list. Then, on the MedEd List page, click the picklist to see all the available lists, and make your selection.

The following table describes the standard lists that are available by default.

MedEd List	Filters
All Current Events	Events that meet both these conditions: <ul style="list-style-type: none"><li>■ Status = Active, In Progress, or Planned</li><li>■ Start Date falls in the range of 30 days before today to 60 days after today.</li></ul>
All Events	All events, sorted alphabetically on event name
All Events This Month	Events with Status = Active, In Progress, or Planned and with Start Date that falls within the current month.
All Recently Created Events	All events, sorted by the created date
All Recently Modified Events	All events, sorted by the modified date
My Events	Events with your name in the Owner field

For information on viewing or creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or view, edit, or delete an existing list. The list of filtered lists on the Manage Lists page includes the standard lists, although you cannot edit or delete them (you can only view them).

## Recently Modified Events Section

The Recently Modified Events section shows this information:

- **Recently Modified Events list.** List of the most recently modified events.
- **Show Full List.** Link for expanding the list of recently modified events.

## MedEd-Related Tasks Section

The Event-Related Tasks section shows the tasks assigned to you, sorted by due date and then priority. It also shows this information:

- **Due Date.** Date task is due as set by you or your manager.
- **Arrow symbol.** Priority for tasks as set by you or your manager. An upward pointing red arrow indicates high priority, a downward pointing green arrow indicates low priority, and no arrow indicates medium priority.
- **Subject.** Title of task. Click the link to review the task.
- **Show Full List.** Link for expanding the list of event-related tasks.

## Related Information

See the following topics for related MedED information:

- [Steps for MedED Events](#) (on page 253)
- [MedED Fields](#) (on page 256)

## Steps for MedEd Events

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32) (new events)
- [Updating Record Details](#) (on page 48)

**NOTE:** You cannot edit or delete events with a Status of Completed.

- [Linking Records to Your Selected Record](#) (on page 49)
- [Tracking Invitees to Medical Education Events](#) (on page 254)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32).

- [Working with Lists](#) (on page 56)
- [Transferring Ownership of Records](#) (on page 67)
- [Deleting and Restoring Records](#) (on page 79)

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Related Information

See the following topics for related MedEd information:

- [MedED Fields](#) (on page 256)
- [MedED Homepage](#) (on page 251)
- [MedED List Page](#) (on page 254)

## Tracking Invitees to Medical Education Events

You can track invitees to the medical education event and store feedback about the event invitation.

### *To track invitees to a medical education event*

- 1** Select the MedEd event.  
For instructions on selecting MedEd events, see [Finding Records](#) (on page 35).
- 2** On the MedEd Details page:
  - Click Add in the Invitees title bar to add invitees to the event.
  - Click Edit in the Invitees title bar to update the status, session details, and comments for an existing invitee.
- 3** On the Invitees page, update the information:
  - a** Click the Lookup icon in the New Contact column.
  - b** Use the Search for a Contact window to create a new contact or select an existing one to add as an invitee.
  - c** On the Invitees page, select the status.  
The Type and YTD Sales are carried over from the contact record.
- 4** Save the record.

## MedEd List Page

The MedEd List page shows the subset or list of events you selected in the MedEd Homepage. From the MedEd List page, you can review multiple events at a glance.

Using the drop-down menu, you can also switch to another event list. The picklist contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the MedEd Lists Section table in [MedEd Homepage](#) (on page 251).

The following table describes what you can do from the MedEd List page.

To do this	Follow these steps
Create a filtered list	On the MedEd List title bar, click Menu, and select Manage Lists, and then click New List. Follow the steps in the New MedEd Event List wizard and click Finish when you are done.
Create an event	On the MedEd List title bar, click New Event. On the MedEd Edit page, enter the required information and save the record.

To do this	Follow these steps
Create a new MedEd list	On the MedEd List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Export the list	On the MedEd List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find an event	Click the Name column header to sort the data. Then click a letter in the alphabet bar. For events beginning with numbers, click 0-9.
Manage all the MedEd lists	On the MedEd List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in the <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the MedEd List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more or fewer records	In the Number of records displayed list at the bottom of the page, select a number of records to see at one time.
Show the key information and filter information for the list	On the MedEd List title bar, click Menu, and select Show List Filter in the MedEd List title bar. Complete the steps described in <a href="#">View List Page</a> (on page 65).
Update an event	Select the record. On the Edit page, update the event and save the record.
View a subset of events	On the MedEd List title bar, click the picklist and change the selection.
View all events	On the MedEd List title bar, click the picklist and change the selection.

## Related Information

See the following topics for related MedED information and topics of interest:

- [MedED Homepage](#) (on page 251)
- [MedED Fields](#) (on page 256)
- [Working with Lists](#) (on page 56)
- [Using Mail Merge for Word](#) (on page 352)

## MedEd Fields

Use the MedEd Edit page to add a medical event or update details for an existing event. The MedEd Edit page shows the complete set of fields available for an event.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Event Detail Information</b>	
Name	Name of the event, up to 50 characters. Required field by default.
Location	Limit of 100 characters.
Start Date	Defaults to the current date and time. Required field by default.
End Date	Defaults to one hour later than the current date and time. Required field by default.
Confirm Date	Target date for sending out confirmation about the event to the invitees.
Status	The status of the medical event. Default values are Active, Cancelled, Completed, In Progress, Inactive, and Planned. <b>NOTE:</b> A MedEd event with a Status of Completed becomes read-only.
Type	The type of medical event. Limit of 30 characters. Default values are CD_ROM Presentation, Conference, Hospital Display, Journal Club, Lunch and Learn, Meeting, Rounds, Seminar, Symposium, Tradeshow, and Trading.
Budget	Budget amount in the currency you specify. The default is set to the System currency. Your Administrator sets the currency using the Activity Currency field. This field is not exposed in the default page layout, but your Administrator can expose it in the custom layout.
Product	Product that you want to highlight during the event. You can select either the product or the product category, but not both.  To add products, your company administrator navigates to Admin and clicks Content Management.
Product Category	Product category that you want to highlight during the event. You can select either the product or product category, but not both.  To add product categories, your company administrator navigates to Admin and clicks Content Management.
Max Attendees	Maximum number of invitees allowed to attend this event.
CME Credit	Number of Continuing Medical Education (CME) credits for this event.



Field	Description
<b>Additional Information</b>	
Owner	Person assigned to this record. Generally, the owner can update record details or delete the record. However, access levels can be adjusted to restrict or expand a user's access.  This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).
Objective	Limit of 500 characters. Required field by default.
Session Details	Details regarding session. Limit of 500 characters.
Modified By	Name of the person who creates or updates the record, followed by the date and time when the record is created or updated. System-generated.
Description	Limit of 250 characters.

## Related Information

See the following topics for related MedED information:

- [MedED Homepage](#) (on page 251)
- [Steps for MedED Events](#) (on page 253)



# 13 Funds

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Use the Funds pages to create, update, and track funds. Funds can be marketing development funds, co-op funds, trade promotion funds, and so on.

**NOTE:** Your company administrator determines which tabs are available to you. If your job responsibility does not include working with funds, the Funds tab might be excluded from your setup.

## About Funds

Funds enable you to manage a set of activities for pre-approval and claims processing of marketing funds. As a fund manager, you create a fund record.

When you create a fund record, you become the owner of the fund, or the fund manager. Fund owners can update or delete fund records, add other users as fund participants, create credit and debit entries, and add attachments and notes to the fund.

Fund participants can view the fund record, but they cannot edit it. They can also submit pre-approval and claim requests against the funds in which they are listed as participants.

Fund managers can view and edit all fund requests against the funds they own, and can approve or reject these fund requests.

**NOTE:** Fund requests in which the Status field is Claim Approved are final and cannot be edited further.

## Funds Homepage

The Funds Homepage is the starting point for managing funds and fund requests. This page provides a window to fund information relevant to you and contains several sections.

## Fund Lists Section

The Fund Lists section shows this information:

- **Fund Lists.** The first 4 filtered lists (by default). Filtered lists are subsets or groups of funds that allow you to limit the number of funds to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the Funds Homepage, click any list. Then, on the Funds List page, click the picklist to see all the available lists, and make your selection.

The following table describes the standard lists that are available by default.

Fund List	Filters
All Funds	All the funds that you and your subordinates own
All Active Funds	All the funds that you and your subordinates own with a Status of Active
My Funds	Funds with your name in the Owner field
My Active Funds	Funds with your name in the Owner field and with a Status of Active

For information on viewing or creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or view, edit, or delete an existing list. The list of filtered lists on the Manage Lists page includes the standard lists, although you cannot edit or delete them (you can only view them).

## Pending Fund Requests Section

The Pending Fund Requests section shows this information:

- **Fund Request Name, Pre-Approved Req., Claim Req., Due Date, and Status.** List of your pending fund requests.
- **Show Full List.** Link for expanding the list of recently modified funds.

## Fund Request Lists Section

The Fund Request Lists section shows this information:

- **Fund Request Lists.** The first 4 filtered lists (by default). Filtered lists are subsets or groups of fund requests that allow you to limit the number of fund requests to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create

additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the Funds Homepage, click any list. Then, on the Fund Request List page, click the picklist to see all the available lists, and make your selection.

The following table describes the standard lists that are available by default.

Fund Request List	Filters
All Fund Requests	All the fund requests that you and your subordinates own
My Fund Requests	Fund requests with your name in the Owner field
My Approved Fund Requests	All fund requests that you own with Status = Pre-Approved.
My Pending Fund Requests	All fund requests that you own with Status = Pre-Approval Submitted.

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or view, edit, or delete an existing list. The list of filtered lists on the Manage Lists page includes the standard lists, although you cannot edit or delete them (you can only view them).

## Fund Request - Open Activities

The Fund Request - Open Activities section shows this information:

- **Due Date, Activity, Subject, and Fund Request.** List of the activities linked to your fund requests.
- **Show Full List.** Link for expanding the list of recently modified funds.

## Related Information

See the following topics for related Fund information:

- [Steps for Funds](#) (on page 262)
- [About Funds](#) (on page 259)
- [Fund Fields](#) (on page 270)

# Steps for Funds

Click a topic to see step-by-step procedures to do the following:

- [Creating Funds](#) (on page 263)
- [Adding Fund Participants](#) (on page 263)
- [Adding Credits to Funds](#) (on page 264)
- [Processing Requests for Funds](#) (on page 264)
- [Processing Claims](#) (on page 266)
- [Applying Debits Against Funds](#) (on page 267)
- [Reviewing Fund Activity](#) (on page 268)
- [Viewing Audit Trails for Funds](#) (on page 268)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32):

- [Creating Records](#) (on page 32)
- [Updating Record Details](#) (on page 48)
  - NOTE:** You can update a fund record if you are its owner. If you are a fund participant, you can create and update fund requests.
- [Linking Records to Your Selected Record](#) (on page 49)
- [Working with Lists](#) (on page 56)
- [Transferring Ownership of Records](#) (on page 67)
- [Adding Notes](#) (on page 71)
- [Attaching Files and URLs to Records](#) (on page 74)
- [Deleting and Restoring Records](#) (on page 79)
- [Customizing the Audit Trail](#) (on page 581)

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Related Information

See the following topics for related Fund information and topics of interest:

- [About Funds](#) (on page 259)
- [Funds Homepage](#) (on page 259)
- [Fund Fields](#) (on page 270)

- [Reports](#) (on page 361)
- [Tracking Assets](#) (on page 147)

## Creating Funds

From within Siebel CRM On Demand High-Tech Edition, you create a fund by entering information in a form. You can access this form from different areas within the application, depending on what you are working on and what you need to do.

This section describes one method for creating a fund, which allows you to add the record while continuing with your work in the main area of the application. For a description of all the methods, see [Creating Records](#) (on page 32).

### *To create a fund using the Create box*

- 1 From any page, go to the Create box in the left Action bar.
- 2 From the list, click the Fund link.
- 3 In the New Fund form, enter the required information. For information on the fields, see [Fund Fields](#) (on page 270).
- 4 Save the record.

## Adding Fund Participants

When you create a fund record, you become the owner by default. Next you want to add fund participants. Adding someone as a fund participant allows that person to view the fund record and submit fund requests against the fund.

**Before you begin.** For users to appear on the list of eligible fund participants, they must first be set up as active users of Siebel CRM On Demand High-Tech Edition.

### *To add a fund participant*

- 1 Select the fund.  
For instructions on selecting funds, see [Finding Records](#) (on page 35).
- 2 On the Fund Detail page, scroll down to the Fund Participants section and click Add Participant.
- 3 On the Add Fund Participant page, click the Lookup icon and select the user.  
The user list consists of all people using Siebel CRM On Demand High-Tech Edition.
- 4 Save the record.

## Adding Credits to Funds

To make funds available, add credit to the fund.

### *To add a credit to a fund*

- 1 Select the fund.  
For instructions on selecting funds, see [Finding Records](#) (on page 35).
- 2 On the Fund Detail page, scroll down to the Fund Credits section and click New in the title bar.
- 3 On the Fund Credit Edit page, enter the required information.  
The Credit Name has a limit of 30 characters.

## Processing Requests for Funds

When you want to start using some of the fund amount, create a fund request and submit it to the fund manager for approval. To track the stage of the fund request, you and your fund manager update the Status field.

### *To submit a request for pre-approval*

- 1 Select the fund.  
For instructions on selecting funds, see [Finding Records](#) (on page 35).
- 2 On the Fund Detail page, scroll down to the Fund Requests section and click New.
- 3 On the Fund Request Edit page, enter the required information.  
The following table describes field information for fund requests. Your administrator can add, rename, or delete fields, so the fields you see might differ from those in this table.

Field	Description
<b>Key Fund Request Information</b>	
Fund Request Name	The name of the Fund Request. Required field. Limit of 50 characters.
Fund	The name of the linked Fund. Required field.



Field	Description
Status	The current status of the Fund Request. Required field. Default options are Claim Approved, Claim Denied, Claim Submitted, In Progress, Pre-Approval Denied, Pre-Approval Submitted, or Pre-Approved.  Fund participants can change the status to: In Progress, Pre-Approval Submitted, or Claim Submitted.
Due Date	Required field. Date by which you need to have the fund request approved.
Campaign	Use to link a campaign with a fund.
Marketing Purpose	Default options are Partner Incentive, Joint Marketing, Competitive Positioning, New Product Launch, or Customer Retention.
Region	Default options are Africa, Asia/Pacific, Europe, Latin America, Middle East, None, North America, Northern Europe, Other, South America, Southern Europe, or Worldwide.
Category	Default options are Advertising, Branding, Customer Event, Direct Mailing, Displays, Executive Event, Joint Advertising, Other, Promotion, Samples, Seminar, Spiff, Trade Show, or Training.
<b>Fund Request Detail Information</b>	
Pre-Approval Req.	The amount of funds that you need to execute your tasks.
Granted	Used by the Fund Manager, this field contains the amount granted to the participant, based on the amount requested in the Pre-Approval Req. field.
Claim Req.	After the task is completed, the participant claims the amount spent to complete the task using this field.
Approved	Used by the Fund Manager, this field contains the amount approved based on the amount claimed.
Request Date	Defaults to today's date.
Pre-Approval Date	Used by the Fund Manager, this field contains the date on which the Fund Manager approved the fund request amount.
Claim Decision Date	Used by the Fund Manager, this field contains the date on which the Fund Manager approved the fund claim amount.
Fund Request Currency	The currency in which the fund was requested.

Field	Description
<b>Additional Information</b>	
Owner	Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.  This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).
Modified By	Name of the person who creates or updates the record, followed by the date and time when the record is created or updated. System-generated.
Description	Limit of 250 characters.

**4** For Status, select Pre-Approval Submitted.

**5** Save the record.

The fund request record appears in the Pending Fund Requests section on the fund manager's Funds Homepage.

### *To pre-approve a fund request*

**1** On the Funds Homepage, select the fund request from the Pending Fund Requests section.

**2** On the Fund Request Detail page, click the Edit button.

**3** On the Fund Request Edit page, do the following:

**a** Enter the appropriate date in the Pre-Approval Date field.

**b** Enter the amount you approve in the Granted field.

**c** Update the Status field to Pre-Approved.

**4** Save the record.

## Processing Claims

Once the Fund Manager approves the fund request and you complete the task for which you requested the fund, you are ready to submit a claim. After you submit the claim, the Fund Manager can review and approve it.

### *To submit a claim*

**1** Select the pre-approved fund request for which you want to submit a claim.

For instructions on selecting fund requests, see [Finding Records](#) (on page 35).

- 2 On the Fund Request Detail page, click the Edit button.
- 3 On the Fund Request Edit page, do the following:
  - a Enter the amount you are claiming in the Claim Req. field.
  - b Select Claim Submitted from the Status field.
  - c Enter an appropriate date in the Due Date field.
- 4 Save the record.

#### *To approve a claim*

- 1 Select the fund request for which you want to approve a claim.  
For instructions on selecting fund requests, see [Finding Records](#) (on page 35).
- 2 On the Fund Request Detail page, review the amount being claimed in the Claim Req. field, and then click the Edit button.
- 3 On the Fund Request Edit page, do the following:
  - a Enter the amount you approve in the Approved field.
  - b Enter the date in the Claim Decision Date field.
  - c Select Claim Approved from the Status field.
- 4 Save the record.  
After a claim is approved, it appears in the Fund Debits section of the fund record.  
**NOTE:** After a claim is approved, you can no longer edit the fund request.

## Applying Debits Against Funds

To deduct an amount from the fund, create a debit record.

#### *To apply a debit against a fund*

- 1 Select the fund.  
For instructions on selecting funds, see [Finding Records](#) (on page 35).
- 2 On the Fund Detail page, scroll down to the Fund Debits section and click New in the title bar to create a debit entry.

- 3 On the Fund Debit Edit page, enter the required information.

The Fund Request Name has a limit of 50 characters.

## Reviewing Fund Activity

You can review the fund activity for records that you manage, or if you are the fund administrator at your company, for all your company's funds and fund requests. This allows you to monitor and track fund activity.

### *To review a fund's activity*

- 1 Select the fund.

For instructions on selecting funds, see [Finding Records](#) (on page 35).

- 2 On the Fund Detail page, scroll down to the Audit Trail section.

The list traces each activity concerning the fund, including transactions, dates, and people involved.

## Viewing Audit Trails for Funds

Your company administrator determines which Fund fields (if any) are audited. You can view the audit trail that tracks the changes made to the audited fields.

By default, the following fields are audited; however, your company administrator can customize these default fields as described in [Customizing the Audit Trail](#) (on page 581):

- For Funds: Owner, Partner, Status, and Target Amount.
- For Fund Requests: Approved, Claim Decision Date, Claim Req., Due Date, Fund, Granted, Owner, Pre-Approval Date, Pre-Approval Req., and Status

**Before you begin.** The Fund audit trail is not displayed by default. To add it to the Fund Detail page, your company administrator must grant read-only access to the related information for Funds for your role. Then you must click the Edit Layout link on the Opportunity Detail page and add the Audit Trail as a Related Information section (see [Changing Your Detail Page Layout](#) (on page 317)).

### *To view the audit trail for a fund*

- 1 Select the fund.

For more information on selecting funds, see [Finding Records](#).

- 2 On the Fund Detail page, scroll down to the Audit Trail section.

Each row shows the date the record is updated, who made the update, and the new and old values in the field.

## Funds List and Fund Requests List Page

The Funds and Fund Requests List pages show the subset or list you selected in the Funds Homepage. From the list pages, you can review multiple funds or fund requests at a glance.

Using the drop-down menu, you can also switch to another list. The picklist contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the Fund Lists Section table in [Funds Homepage](#) (on page 259).

The following table describes what you can do from both the Funds List and Fund Requests List pages.

To do this	Follow these steps
Create a filtered list	On the Funds List or Fund Requests List title bar, click the Manage Lists link and select New List. Follow the steps in the New Funds List or the New Fund Request List wizard, and click Finish when you are done.
Create a Fund or Fund Request record	On the Funds List or Fund Requests List title bar, click New Fund or New Fund Request. On the Edit page, enter the required information and save the record.
Create a new Fund list or Fund Request list	On the Funds List or Fund Requests List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Export the list	On the Funds List or Fund Requests List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a Fund or Fund Request list	Click the Fund Name or Fund Request Name column header to sort the data. Then click a letter in the alphabet bar. For funds beginning with numbers, click 0-9.
Manage all Fund lists or Fund Request lists	On the Funds List or Fund Requests List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in the <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Funds List or Fund Requests List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more or fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Funds List or Fund Requests List title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> (on page 65).
Update a fund or a fund request	On the Funds List or Fund Requests List page, select the record. On the Edit page, update the fund or the fund request record and save the record.

To do this	Follow these steps
View a subset of funds or fund requests	On the Funds List or Fund Requests List title bar, click the picklist and change the selection.
View all funds	On the Funds List or Fund Requests List title bar, click the picklist and change the selection.

### Related Information

See the following topics for related Fund information:

- [About Funds](#) (on page 259)
- [Funds Homepage](#) (on page 259)
- [Fund Fields](#) (on page 270)
- [Working with Lists](#) (on page 56)

## Fund Fields

Use the Fund Edit page to add a fund or update details for an existing fund. The Fund Edit page shows the complete set of fields for a fund record.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Fund Information</b>	
Fund ID	The Fund identifier. System-generated.
Fund Name	The name of the fund. Required field. Limit of 50 characters.
Start Date End Date	Time period that the fund is valid.
Status	Default options are Active, Closed, In Progress, or Suspended.
Partner	Accounts must have the Partner field checked for them to appear in this selection list.
Target Amount	The total dollar amount targeted for the fund. Required field.
Total Credits	Read-only field. The sum of all the fund credits that are created in the Fund Credits section.

Field	Description
Total Debits	Read-only field. This is the sum of all the fund debits that are created in the Fund Debits section. Once a Fund Claim is approved, a debit record is automatically created in the Fund Debit section.
Balance	Read-only field. Value is: (Total Credits - Total Debits).
Total Pre-Approved	Read-only field. The sum of all the Fund Requests approved for a given Fund. Once the Fund Manager approves a Fund Request, the value is reflected in this field.
Balance after Pre-Approvals	Read-only field. Value is: (Total Credits - Total Pre-Approved).
<b>Additional Information</b>	
Owner	<p>Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>
Modified By	Name of the person who last updated the record followed by the date and time it occurs.
Description	Limit of 250 characters.

## Related Information

See the following topics for related Fund information:

- [About Funds](#) (on page 259)
- [Funds Homepage](#) (on page 259)
- [Steps for Funds](#) (on page 262)





# 14 Households

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Use the Households pages to create, update, and track household records. A household allows contacts to be grouped together and their related information to be rolled up from the contacts linked to the household.

**NOTE:** Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking household information, the Households tab might be excluded from your setup.

## About Households

A household is a group of contacts generally sharing a common link or association. Households provide valuable segmentation information on the household as a whole, as well as a summary of information about the household member contacts. You can use the Households pages to identify and capture demographic information about a household. You can also use the Households pages to review customer's portfolio accounts, such as financial accounts, brokerage accounts, and life insurance policies. You can also view contact information related to that household.

## Household Homepage

The Household Homepage is the starting point for managing households. This page provides a window to household information relevant to you and contains several sections.

### Household Lists Section

The Household Lists section shows this information:

- **Household Lists.** The first 2 filtered lists (by default). Filtered lists are subsets or groups of households that allow you to limit the number of households to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the Household Homepage, click any list. Then, on the Household List page, click the picklist to see all the available lists, and make your selection.

The following table describes the standard lists that are available by default.

Household List	Filters
All Households	None
All Recently Modified Households	All households, sorted by the modified date.

For information on viewing or creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or view, edit, or delete an existing list. The list of filtered lists on the Manage Lists page includes the standard lists, although you cannot edit or delete them (you can only view them).

### Recently Modified Household Section

The Recently Modified Household section shows this information:

- **Recently Modified Households list.** List of the most recently modified households.
- **Show Full List.** Link for expanding the list of recently modified households.

### Related Information

See the following topics for related Household information:

- [Steps for Households](#) (on page 274)
- [About Households](#) (on page 273)
- [Household Fields](#) (on page 278)

## Steps for Households

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32) (new households)
- [Profiling Households](#) (on page 275)
- [Tracking Household Members](#) (on page 276)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32):

- [Linking Records to Your Selected Record](#) (on page 49) (such as portfolio accounts)
- [Working with Lists](#) (on page 56)

- [Transferring Ownership of Records](#) (on page 67)
- [Adding Notes](#) (on page 71)
- [Attaching Files and URLs to Records](#) (on page 74)
- [Deleting and Restoring Records](#) (on page 79)
- [Merging Records](#) (on page 70)
- [Sharing Records \(Teams\)](#) (on page 68)

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Related Information

See the following topics for related Household information:

- [About Households](#) (on page 273)
- [Household Homepage](#) (on page 273)
- [Household Fields](#) (on page 278)

## Profiling Households

You can profile households by updating the information in household records.

### *To profile a household*

- 1 Select the household.  
For instructions on selecting households, see [Finding Records](#) (on page 35).
- 2 On the Household Detail page, click Edit.
- 3 On the Household Edit page, fill in the information. For a description of the fields, see [Household Fields](#) (on page 278).

## Tracking Household Members

To track members for households, add them as contacts within the household.

### *To track household members*

- 1 Select the household record.  
For instructions on selecting household records, see [Finding Records](#) (on page 35).
- 2 On the Household Details page, scroll down to the Contacts section and click Add.
- 3 On the Contact List page, click the Lookup icon in the New Contact field. This launches the Search for Contact window.
- 4 In the Search for Contact window, select a contact.
- 5 On the Contact List page, select the relation to the household for the contact in the Relationship drop-down.

Field	Description
New Contact	The contact name for the household. Select the contact in the Search for Contact window.
Relationship	The contact's relationship to the household. You can select many predefined relationships, for example: Head, Spouse, Child, In-Law, 2nd Generation Child, Boss, and so on.
Rollup	<p>Check the Rollup check box to select a subset of contacts to rollup into the household financial totals (for example, Total Net Worth or Total Income). Contacts not selected are not rolled up into any of the totals for households, or for any related list such as Opportunities, Portfolios, Activities, or Notes. Rollup is checked by default.</p> <p><b>Note:</b> The Rollup check box on the Contact Detail page and the Household Detail page are the same, so a change on one page is reflected in the other page.</p>

- 6 Click Save on the Contact List page.
- 7 Drill down in the New Contact field to select a contact, and then select the relation to the household for the contact in the Relationship picklist.

For information on Household fields, see [Household Fields](#) (on page 278).

## Household List Page

The Household List page shows the subset or list of households you selected in the Household Homepage. From the Household List page, you can review multiple households at a glance.

Using the drop-down menu, you can also switch to another household list. The picklist contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table in [Household Homepage](#) (on page 273).

The following table describes what you can do from the Households List page.

To do this	Follow these steps
Add households to books or remove households from books	On the Household List title bar, click Menu, and select Batch Assign Book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Create a filtered list	On the Household List title bar, click Menu, and select Manage Lists, and then click New List. Follow the steps in the New Households List wizard and click Finish when you are done.
Create a household record	On the Household List title bar, click New Household. On the Household Edit page, enter the required information and save the record.
Create a new Household list	On the Household List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Delete all records from the Household list	On the Household List title bar, click Menu, and select Batch Delete. Complete the steps described in <a href="#">Deleting and Restoring Records</a> (on page 79).
Export the list	On the Household List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a household	Click the Name column header to sort the data. Then click a letter in the alphabet bar. For households beginning with numbers, click 0-9.
Manage all the Household lists	On the Household List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Household List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more or fewer records	In the Number of records displayed list at the bottom of the page, select a number of records to see at one time.
Show the key information and filter information for the list	On the Household List title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> (on page 65).

To do this	Follow these steps
Update a group of Household records at once	On the Household List title bar, click Menu, and select Mass Update in the Household List title bar. Complete the steps described in <a href="#">Updating Groups of Records</a> (on page 69).
Update a household	Select the record. On the Edit page, update the household and save the record.
View a subset of households	On the Household List title bar, click the picklist and change the selection.
View all households	On the Household List title bar, click the picklist and change the selection.

### Related Information

See the following topics for related Household information:

- [About Households](#) (on page 273)
- [Household Homepage](#) (on page 273)
- [Household Fields](#) (on page 278)
- [Working with Lists](#) (on page 56)

## Household Fields

Use the Household Edit page to add a household or update details for an existing household. The Household Edit page shows the complete set of fields for a household.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields. Many fields on the Household pages are read-only because they are calculated from the contact records linked to the household with the Roll Up field checked. Additive fields, such as Total Assets, are totaled from all contacts with the Roll Up field checked in the household. Non-additive fields, such as addresses, are usually rolled up from the primary contact in the household.

Field	Description
<b>Key Household Information</b>	
Household Name	Limit of 50 characters.
Primary	Read-only.

Field	Description
<b>Household Detail Information</b>	
Type	Default values are: Family - Children, Family - No Children, Family - Senior Citizen, Single, Single Parent Family, Family, Extended Family, Unmarried Couple, Empty Nest, Retired, and Other.
Segment	Default values are: White Collar, Blue Collar, Rural, Own Residence, Renter, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth.
Last Activity	Read-only. Reflects the date of the last activity linked to the household.
Head of Household DOB	Read-only.
<b>Additional Information</b>	
Primary Address	Read-only.
Alternate Address	Read-only.
Owner	<p>Generally, the owner can update record details, transfer a record to another owner, or delete the record. However, access levels can be adjusted by the Administrator to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>
<b>Household Financial Profile</b>	
Total Income	The total income for all contacts that roll up into the household. Read-only.
Total Assets	The total assets for all contacts that roll up into the household. Read-only.
Total Expenses	The total expenses for all contacts that roll up into the household. Read-only.
Total Liabilities	The total liabilities for all contacts that roll up into the household. Read-only.
Total Net Worth	The total net worth for all contacts that roll up into the household. Read-only.
<b>Investment Risk Profile</b>	
Risk Profile	Populated from contact record of the head of household. Read-only.
Experience Level	Populated from contact record of the head of household. Read-only.
Investment Horizon	Populated from contact record of the head of household. Read-only.
Current Investment Mix	Populated from contact record of the head of household. Read-only.
Objective	Populated from contact record of the head of household. Read-only.
Primary Goal	Populated from contact record of the head of household. Read-only.

### Related Information

See the following topics for related Household information:

- [About Households](#) (on page 273)
- [Household Homepage](#) (on page 273)
- [Steps for Households](#) (on page 274)
- [Sharing Records \(Teams\)](#) (on page 68)



# 15 Portfolio Accounts

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Use the Portfolio Account pages to create, update, and track portfolio accounts.

**NOTE:** Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking portfolio account information, the Portfolio tab might be excluded from your setup.

## About Portfolio Accounts

Portfolio accounts can represent:

- Financial accounts: a brokerage account, loan, or a credit card
- Insurance contracts: a life insurance policy or an annuity

## Portfolio Account Homepage

The Portfolio Account Homepage is the starting point for managing portfolio accounts. This page provides a window to portfolio account information relevant to you and contains several sections.

### Portfolio Account Lists Section

The Portfolio Account Lists section shows this information:

- **Portfolio Account Lists.** The first 4 filtered lists (by default). Filtered lists are subsets or groups of portfolio accounts that allow you to limit the number of portfolio accounts to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the Portfolio Account Homepage, click any list. Then, on the Portfolio Account List page, click the picklist to see all the available lists, and make your selection.

The following table describes the standard lists that are available by default.

Portfolio Account List	Filters
All Portfolio Accounts	All portfolio accounts to which you have visibility
All Recently Created Portfolio Accounts	All portfolio accounts to which you have visibility, sorted by the created date
All Recently Modified Portfolio Accounts	All portfolio accounts to which you have visibility, sorted by the modified date
My Portfolio Accounts	All portfolio accounts with your name in the Owner field

For information on viewing or creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or view, edit, or delete an existing list. The list of filtered lists on the Manage Lists page includes the standard lists, although you cannot edit or delete them (you can only view them).

## Recently Modified Portfolio Accounts Section

The Recently Modified Portfolio Accounts section shows this information:

- **Recently Modified Portfolio Accounts list.** List of the most recently modified portfolio accounts.
- **Show Full List.** Link for expanding the list of recently modified portfolio accounts.

## Related Information

See the following topics for related Portfolio Account information:

- [About Portfolio Accounts](#) (on page 281)
- [Portfolio Account Fields](#) (on page 287)
- [Steps for Portfolio Accounts](#) (on page 282)

## Steps for Portfolio Accounts

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32) (new portfolio accounts)
- [Updating Record Details](#) (on page 48)

- [Tracking Key Contacts for Portfolio Accounts](#) (on page 284)
- [Specifying Portfolio Subaccounts](#) (on page 284)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32):

- [Linking Records to Your Selected Record](#) (on page 49) (including referrals)
- [Working with Lists](#) (on page 56)
- [Sharing Records \(Teams\)](#) (on page 68)
- [Transferring Ownership of Records](#) (on page 67)
- [Adding Notes](#) (on page 71)
- [Attaching Files and URLs to Records](#) (on page 74)
- [Deleting and Restoring Records](#) (on page 79)
- [Renaming Record Types](#) (on page 596)
- [Merging Records](#) (on page 70)
- [Steps for Calendars and Activities](#) (on page 88) (working with activities)
- [Setting Up Books](#) (on page 626)
- [Creating Web Applets](#) (on page 574)

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Related Information

See the following topics for related Portfolio Account information:

- [About Portfolio Accounts](#) (on page 281)
- [Portfolio Account Homepage](#) (on page 281)
- [Portfolio Account Fields](#) (on page 287)

## Tracking Key Contacts for Portfolio Accounts

To track key contacts for portfolio accounts, add them as contacts linked to the portfolio account record.

### *To track key contacts for portfolio accounts*

- 1 Select the portfolio account record.  
For instructions on selecting portfolio accounts, see [Finding Records](#) (on page 35).
- 2 On the Portfolio Account Details page, scroll down to the Contacts section and click Add.
- 3 On the Contact List page, click the Lookup icon next to the Name column.
- 4 In the Search for a Contact window, you can click New to create a new contact record or select an existing contact.
- 5 On the Contact List page, fill in the information as required.
- 6 Save the record.

## Specifying Portfolio Subaccounts

You can indicate portfolio account hierarchies, such as a mutual fund that is within a life insurance policy or a brokerage account, by specifying a parent-child relationship. First create the parent portfolio account, and then select that account as the parent for the child or portfolio subaccount.

Portfolios have one-to-many relationship with portfolio subaccounts. For example, you can have many mutual fund or stock subaccounts for the brokerage portfolio account.

### *To create a portfolio subaccount*

- 1 Select the parent portfolio account.  
For information on selecting portfolio accounts, see [Finding Records](#) (on page 35).
- 2 On the Portfolio Account Details page, scroll to the Portfolio Sub-Accounts section and click New.
- 3 Complete the fields in the Portfolio Account Edit page that is launched.
- 4 Save the record.

***To specify the parent portfolio account***

- 1 Select the child portfolio subaccount.  
For instructions on selecting portfolio accounts, see [Finding Records](#) (on page 35).
- 2 On the Portfolio Account Edit page, click the Lookup icon next to the Parent Portfolio Account field.
- 3 In the Search window, select the parent portfolio account.
- 4 Save the record.

## Portfolio Account List Page

The Portfolio Account List page shows the subset or list of portfolio accounts you selected in the Portfolio Account Homepage. From the Portfolio Account List page, you can review multiple portfolio accounts at a glance.

Using the drop-down menu, you can also switch to another portfolio account list. The picklist contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table in [Portfolio Account Homepage](#) (on page 281).

The following table describes what you can do from the Portfolio Account List page.

To do this	Follow these steps
Add portfolio accounts to books or remove portfolio accounts from books	On the Portfolio Account List title bar, click Menu, and select Batch Assign Book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Create a filtered list	On the Portfolio Account List title bar, click Menu, and select the Manage Lists link in the Portfolio Account List title bar, and then click New List. Follow the steps in the New Portfolio Accounts List wizard and click Finish when you are done.
Create a new Portfolio Account list	On the Portfolio Account List title bar, click Menu, and select Create New List in the Portfolio Account List title bar. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Create a portfolio account record	On the Portfolio Account List title bar, click New Account. On the Portfolio Account Edit page, enter the required information and save the record.
Delete all records from the Portfolio Account list	On the Portfolio Account List title bar, click Menu, and select Batch Delete. Complete the steps described in <a href="#">Deleting and Restoring Records</a> (on page 79).
Export the list	On the Portfolio Account List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).

To do this	Follow these steps
Find a portfolio account	Click the Account Number column header to sort the data. Then click a letter in the alphabet bar. For portfolio accounts beginning with numbers, click 0-9.
Manage all the Portfolio Account lists	On the Portfolio Account List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Portfolio Account List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more or fewer records	In the Number of records displayed list at the bottom of the page, select a number of records to see at one time.
Show the key information and filter information for the list	On the Portfolio Account List title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> (on page 65).
Update a group of Portfolio Account records at once	On the Portfolio Account List title bar, click Menu, and select Mass Update. Complete the steps described in <a href="#">Updating Groups of Records</a> (on page 69).
Update a portfolio account	Select the record. On the Edit page, update the portfolio account and save the record.
View a subset of portfolio accounts	On the Portfolio Account List title bar, click the picklist and change the selection.
View all portfolio accounts	On the Portfolio Account List title bar, click the picklist and change the selection.

### Related Information

See the following topics for related Portfolio Account information:

- [About Portfolio Accounts](#) (on page 281)
- [Portfolio Account Homepage](#) (on page 281)
- [Portfolio Account Fields](#) (on page 287)
- [Working with Lists](#) (on page 56)

## Portfolio Account Fields

Use the Portfolio Account Edit page to add a portfolio account or update details for an existing portfolio account. The Portfolio Account Edit page shows the complete set of fields for a portfolio account.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Account Information</b>	
Account Number	Required field. Limit of 100 characters.
Institution	Lookup field for the institution linked with this portfolio account.
Product	Lookup field for the product linked with this portfolio account.
Account Type	A picklist of available account types. Default values are: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings, and Other.
Primary Contact	Read-only.
Account	Lookup field for the account linked with this portfolio account.
Revenue	Revenue linked with this portfolio account.
Purchase Date	The date that the financial account is opened.
Cancelled/Sold Date	The date that the account is closed. If this is an individual holding, it may be the date that all shares are sold.
Status	Status of the portfolio account. Default values are: Active, Pending, Quote, Terminated, and Closed.
Modified By	Name of the person who creates or updates the record, followed by the date and time when the record is created or updated.
Parent Portfolio Account	The parent portfolio account for the current portfolio account.
Owner	<p>Generally, the owner can update record details, transfer a record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.</p> <p>This value affects which records are included in reports you or your managers run (from Reports and Dashboard pages).</p>

Field	Description
Primary Group	Primary group of the portfolio owner.  For releases previous to release 13, this field is used to define Group visibility to Portfolio records. It is recommended that you use the Book of Business feature to replace this capability. For more information, see <a href="#">Setting Up Books</a> (on page 626).
<b>Policy Information</b>	
Risk Class	Defines the risk level of the portfolio. Limit of 50 characters.
Premium	The cost of the insurance policy in your currency units.
Face Value	The face value of the insurance policy in your currency units.
Effective Date	The start date for the insurance policy.
Expiration Date	The expiry date for the insurance policy.
<b>Investment Information</b>	
Total Asset Value	The value of all your investments in your currency units.
Valuation Date	The date of the valuation of your total assets.
<b>Loan Information</b>	
Loan Amount	The value of your loan in your currency units.
Annual % Rate	The interest rate for your loan.
Maturity	The date on which the loan is due for payment.
Term	Read-only. The concatenation of Term Length and Term Unit.
Term Length	The period of time over which the loan is amortized, usually expressed in months.
Term Unit	Limit of 30 characters. Default values are Day, Week, Month, and Year.
<b>Credit Card Information</b>	
Credit Limit	The maximum credit available for the account.
Annual % Rate	The annual interest rate charged on charges placed on the balance.

## Related Information

See the following topics for related Portfolio Account information:

- [About Portfolio Accounts](#) (on page 281)
- [Portfolio Account Homepage](#) (on page 281)
- [Steps for Portfolio Accounts](#) (on page 282)



# 16 Vehicles

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Use the Vehicles pages to create, update, and track vehicles.

**NOTE:** Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking vehicle information, the Vehicles tab may be excluded from your setup.

## Vehicle Homepage

The Vehicle Homepage is the starting point for managing vehicles. This page provides a window to vehicle information relevant to you and contains several sections.

### Vehicle Lists Section

The Vehicle Lists section shows this information:

- **Vehicle Lists.** The first 3 filtered lists (by default). Filtered lists are subsets or groups of vehicles that allow you to limit the number of vehicles to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the Vehicle Homepage, click any list. Then, on the Vehicle List page, click the picklist to see all the available lists, and make your selection.

The following table describes the standard lists that are available by default.

Vehicle List	Filters
All Recently Modified Vehicles	All vehicles, sorted by the modified date
All Vehicles	All vehicles, sorted by the VIN
My Vehicles	Vehicles with your name in the Owner field

For information on viewing or creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or view, edit, or delete an existing list. The list of filtered lists on the Manage Lists page includes the standard lists, although you cannot edit or delete them (you can only view them).

### Recently Modified Vehicles Section

The Recently Modified Vehicles section shows this information:

- **Recently Modified Vehicles list.** List of vehicles with data that was recently changed.
- **Show Full List.** Link for expanding the list of recently modified vehicles.

### Vehicle-Related Service Requests Section

The Vehicle-Related Service Request section shows this information:

- **Vehicle-Related Service Requests.** Service requests assigned to you. Click the SR Number link to review the service request.
- **Subject.** Title of service request.
- **Show Full List.** Link for expanding the list of vehicle-related service requests.

### Related Information

See the following topics for related Vehicle information:

- [Vehicle Fields](#) (on page 296)
- [Steps for Vehicles](#) (on page 290)

## Steps for Vehicles

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32) (new vehicles)
- [Updating Vehicle Ownership](#) (on page 291)
- [Tracking Sales Histories of Vehicles](#) (on page 292)
- [Tracking Service Histories of Vehicles](#) (on page 292)
- [Tracking Assets](#) (on page 147) (includes linking vehicles to accounts)
- [Exposing a Vehicle Product Type](#) (on page 294)

For additional procedures that are common to all records, see [Working with Records](#) (on page 32):

- [Updating Record Details](#) (on page 48)

- [Linking Records to Your Selected Record](#) (on page 49)
- [Working with Lists](#) (on page 56)
- [Adding Notes](#) (on page 71)
- [Transferring Ownership of Records](#) (on page 67)
- [Attaching Files and URLs to Records](#) (on page 74)
- [Deleting and Restoring Records](#) (on page 79)
- [Renaming Record Types](#) (on page 596)

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Related Information

See the following topics for related Vehicle information:

- [Vehicle Fields](#) (on page 296)
- [Vehicle Homepage](#) (on page 289)
- [Reports](#) (on page 361)

## Updating Vehicle Ownership

When a vehicle is sold, update the vehicle record to track the vehicle ownership.

- 1 Select the vehicle.  
For instructions on selecting vehicles, see [Finding Records](#) (on page 35).
- 2 On the Vehicle Detail page, click Edit in the title bar.
- 3 On the Vehicle Edit page, update the Owned By field in the Vehicle record.
- 4 Save the record:
  - To save this record and then open the Vehicle Detail page (where you can link information to this record), click Save.
  - To save this record and then open the Edit page (where you can create another vehicle record), click Save & New Vehicle.

## Tracking Sales Histories of Vehicles

When you want to review, update, or create a sales history for a vehicle, update the vehicle record.

### *To track the vehicle's sales history*

- 1 Select the vehicle.

For instructions on selecting vehicles, see [Finding Records](#) (on page 35).

- 2 On the Vehicle Detail page, scroll down to the Sales History section, and click Add in the title bar.

- 3 On the Sales History Edit page, fill in the information.

The following table describes some field information for sales histories.

Field	Comments
Sales Number	System-generated number.
Currency Code	Defaults to your currency.
Owner First Name	When you select the last name, this field is filled in.
Owner Last Name	Owner of the vehicle.

- 4 Save the record.

## Tracking Service Histories of Vehicles

When you want to review, update, or create a service history for a vehicle, update the vehicle record.

### *To track the vehicle's service history*

- 1 Select the vehicle.

For instructions on selecting vehicles, see [Finding Records](#) (on page 35).

- 2 On the Vehicle Detail page, scroll down and click Add in the Service History title bar.

- 3 On the Service History Edit page, fill in the information.

The following table describes some field information for service histories.

Field	Comments
SH #	Service History number, which is system-generated. Limit of 30 characters.
SR #	Service request record linked to this service history. Limit of 64 characters.
Owner Last Name	Owner of the vehicle. Limit of 50 characters.
Service Date	Default is today's date.
Currency Code	Defaults to your currency. Limit of 20 characters.
Service Name	A name or number linked with the service history record. Limit of 100 characters.
Make	The manufacturer or brand name of the vehicle. Read-only.
Owner First Name	When you select the last name, this field is filled in. Limit of 50 characters.
Service Provider	Dealer or other service provider who serviced the vehicle. Limit of 100 characters.
Description	Limit of 1999 characters.

- 4 Save the record.

## Tracking Financial Information for Vehicles

You can track the financial information for a vehicle.

### *To track the financial information for a vehicle*

- 1 Select the vehicle.  
For instructions on selecting vehicles, see [Finding Records](#) (on page 35).
- 2 On the Vehicle Detail page, scroll down and click Add in the Financial Information title bar.
- 3 On the Financial Information Edit page, fill in the information.  
The following table describes some field information for financial information.

Field	Comments
Financial Detail #	System-generated number. Limit of 15 characters.
Finance Provider	Limit of 30 characters.

# Exposing a Vehicle Product Type

Normally, to add products, your company administrator uses the Content Management portion of the Admin tool. For Vehicles, the Administrator can update the product record with the Product Type field set to Vehicle. Note that the Product Type for Vehicle records is not exposed in the product default layout. To expose the Product Type for a vehicle, your company administrator can create a custom product page layout by completing the steps in the following procedure.

### *To expose the product type for a vehicle record*

- 1** From any page, click Admin, click Application Customization, click Product, click Product Page Layout, and copy the Product Page Standard Layout to a new layout.
- 2** Complete the Page Layout Wizard for the Product:
  - a** In Step 1, provide a name for your layout.
  - b** In Step 2, check the Required box for the Product Type.
  - c** In Step 3, make sure that the Product Type field is listed in the Key Product Information section on the right.
  - d** Click Finish to exit the wizard.
- 3** Assign the new custom layout to a user role as required using the Role Management Wizard. Click Admin, click User Management & Access Control, then click Role Management:
  - a** Find the role that you want to assign to the custom product page layout and click Edit.
  - b** In step 6 of the wizard, change the Page Layout Name to the custom product page layout for the Product record.
  - c** Click Finish to exit the wizard.

The user with the role that is modified can create a product record with the Product Type field visible using the Admin Tool by clicking Admin, Content Management, then clicking Products.

For more information, see [Setting Up Company Products](#) (on page 767).

# Vehicle List Page

The Vehicle List page shows the subset or list of vehicles you selected in the Vehicle Homepage. From the Vehicle List page, you can review multiple vehicles at a glance.

Using the drop-down menu, you can also switch to another vehicle list. The picklist contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table in [Vehicle Homepage](#) (on page 289).

The following table describes what you can do from the Vehicle List page.

To do this	Follow these steps
Create a filtered list	On the Vehicle List title bar, click Menu, and select Manage Lists, and then click New List. Follow the steps in the New Vehicle List wizard and click Finish when you are done.
Create a vehicle record	On the Vehicle List title bar, click New. On the Vehicle Edit page, enter the required information and save the record.
Create a new Vehicle list	On the Vehicle List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Export the list	On the Vehicle List title bar, click Menu, and select Export List in the Vehicle List title bar. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a vehicle	The default sort is on the VIN column. However, you can click any column header to sort the data. Then click a letter in the alphabet bar. For data beginning with numbers, click 0-9.
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Vehicle List title bar, click Menu, and select Refine List in the Vehicle List title bar. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more or fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Vehicle List title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> (on page 65).
Update a vehicle	Select the record. On the Edit page, update the vehicle and save the record.
View a subset of vehicles	On the Vehicle List title bar, click the picklist and change the selection.
View all vehicles	On the Vehicle List title bar, click the picklist and change the selection.

## Related Information

See the following topics for related Vehicle information:

- [Vehicle Homepage](#) (on page 289)
- [Vehicle Fields](#) (on page 296)
- [Working with Lists](#) (on page 56)

## Vehicle Fields

Use the Vehicle Edit page to add a vehicle or update details for an existing vehicle. The Vehicle Edit page shows the complete set of fields for a vehicle.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Vehicle Information</b>	
VIN	Vehicle identifier. Limit of 100 characters.
Make	The manufacturer or brand name of the vehicle. Default values include: Metro Motors, Toyota, and Unknown Make.
Model	Model of the vehicle. Default values are: 4Runner and Tacoma.
Product Name	<p>The name of the product.</p> <p>Normally, to add products, your company administrator uses the Content Management portion of the Admin tool. For Vehicles, the company administrator can update the product record with the Product Type field set to Vehicle. Note that the Product Type is not exposed in the product default layout.</p> <p>The procedure to expose Product Type for vehicles is described in <a href="#">Exposing a Vehicle Product Type</a> (on page 294).</p>
Trim	The trim for the vehicle. Default values are: 2WD and Prerunner.
Door	The number of doors for the vehicle. The default values are: 2 Door, 3 Door, and 4 Door.
Exterior Color	The color of the vehicle.
<b>Additional Vehicle Information</b>	
Used/New	Whether the vehicle is new or used.
Product Type	The type of vehicle. Limit of 30 characters.
Interior Color	Color of the vehicle's interior, for example, Red.
Transmission	The vehicle's transmission type. The default values are: Auto, Manual, and Option.
Engine	The vehicle's engine type. The default values are: 4 Cylinder, 6 Cylinder, 8 Cylinder, 10 Cylinder, and Option.
Body	The vehicle's body type, for example, Coupe or Cabriolet.
Owned By	The vehicle ownership type, for example, Business or Company Car.



Field	Description
Contact	The contact person for the vehicle. Limit of 100 characters.
Account	The account linked with the vehicle.
Account Site	The location of the account. Limit of 50 characters.
Selling Dealer	Name of the dealer selling the vehicle. Limit of 100 characters.
Servicing Dealer	Name of the dealer servicing the vehicle. Limit of 100 characters.
MSRP	The manufacturer's suggested retail price (MSRP) in the currency used in the Vehicle record. Limit of 22 characters.
Dealer Invoice Price	The dealer's invoice price in the currency used in the Vehicle record. Limit of 22 characters.
Status	The current status of the vehicle, for example, Production.
Location	The location of the vehicle, for example, Dealer Lot.
Current Mileage	The current number of miles that appears on the vehicles odometer. Limit of 22 characters (number).
Warranty Type	The type of warranty that is provided with the vehicle, for example, Full or Extended.
License Number	The owner's license number. Limit of 30 characters.
License State	The state for which the license is issued.
Description	Limit of 250 characters.

**Note:** To configure any of the picklist fields, for example Model, Trim, Door, your company administrator can customize the application for the picklist values as described in [Changing Picklist Values](#) (on page 568).

## Custom Fields

**NOTE:** Company administrators, whose role includes the [Customize Application](#) privilege, typically create custom fields.

Any custom field that is created in an Asset record appears as the same custom field in the Vehicle record. A Vehicle record inherits a custom field in an Asset record. However, any custom field created in a Vehicle record does not automatically appear in the Asset record.

If you want to see the same custom field in both the Asset view and the Vehicle view, your company administrator can create the custom field in the Asset record, and make it visible to both the Asset view and the Vehicle view.

If you do not want to see the same custom field in both the Asset view and the Vehicle record, your company administrator can create the Asset specific custom field for the Asset, and make the custom field visible only in the Asset view.

For more information on custom fields, see [About Custom Fields](#) (on page 557).

### Additional Fields

Several fields do not appear on the Vehicle Detail page by default: Part #, Purchase Date, Purchase Price, Quantity, Ship Date, Install Date, Expiration Date, Notify Date, Product Category, and Contract.

Your company administrator can change the definitions of these fields as required. For more information on changing field definitions, see [Creating and Editing Fields](#) (on page 559). To make the fields visible, your company administrator must include these fields in the page layout. For more information on making these fields visible on a page, see [Customizing Static Page Layouts](#) (on page 570).

### Related Information

See the following topics for related Vehicle information:

- [Vehicle Homepage](#) (on page 289)
- [Steps for Vehicles](#) (on page 290)

# 17 Dealers

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Use the Dealers home pages to create, update, and track dealer records.

**NOTE:** Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking dealer information, the Dealer tab might be excluded from your setup.

## Dealer Homepage

The Dealer Homepage is the starting point for managing dealers. This page provides a window to dealer information relevant to you and contains several sections.

### Dealer Lists Section

The Dealer Lists section shows this information:

- **Dealer Lists.** The first 3 filtered lists (by default). Filtered lists are subsets or groups of dealers that allow you to limit the number of dealers to work with at a time.

The application comes with a set of standard lists, arranged in alphabetical order. All standard lists are public and visible to everyone. You and your managers can create additional lists based on different criteria. These custom lists appear in alphabetical order above the standard set of lists.

If an already-created list does not appear on the Dealer Homepage, click any list. Then, on the Dealer List page, click the picklist to see all the available lists, and make your selection.

The following table describes the standard lists that are available by default.

Dealer List	Filters
All Dealers	All dealers, sorted alphabetically on Dealer Name
All Recently Modified Dealers	All dealers, sorted by the modified date
My Dealers	Dealers with your name in the Owner field

For information on viewing or creating these lists, see [Working with Lists](#) (on page 56).

- **Manage Lists.** Link that takes you to the page where you can review the entire list of created filtered lists, create a new list, or view, edit, or delete an existing list. The list of filtered lists on the Manage Lists page includes the standard lists, although you cannot edit or delete them (you can only view them).

### Recently Modified Dealers Section

The Recently Modified Dealers section shows this information:

- **Recently Modified Dealers list.** List of dealers whose information was recently changed.
- **Show Full List.** Link for expanding the list of recently modified dealers.

### Dealer-Related Opportunities Section

The Dealer-Related Opportunities section shows this information:

- **Dealer-Related Opportunities.** Top opportunities assigned to you.
- **Show Full List.** Link for expanding the list of dealer-related opportunities.

### Related Information

See the following topics for related Dealer information:

- [Dealer Fields](#) (on page 302)
- [Steps for Dealers](#) (on page 300)

## Steps for Dealers

Click a topic to see step-by-step procedures to do the following:

- [Creating Records](#) (on page 32) (new dealers)
- [Updating Record Details](#) (on page 48)
- [Linking Records to Your Selected Record](#) (on page 49) (for adding sales and service hours or brands the dealer handles)
- [Working with Lists](#) (on page 56)
- [Transferring Ownership of Records](#) (on page 67)
- [Adding Notes](#) (on page 71)
- [Attaching Files and URLs to Records](#) (on page 74)
- [Deleting and Restoring Records](#) (on page 79)
- [Steps for Calendars and Activities](#) (on page 88)

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in online help.

Also, depending on the access level you have, you may not be able to perform all procedures described in the preceding list.

## Related Information

See the following topics for related Dealer information:

- [Dealer Fields](#) (on page 302)
- [Dealer Homepage](#) (on page 299)
- [Reports](#) (on page 361)

## Dealer List Page

The Dealer List page shows the subset or list of dealers you selected in the Dealer Homepage. From the Dealer List page, you can review multiple dealers at a glance.

Using the drop-down menu, you can also switch to another dealer list. The picklist contains both standard lists distributed with the application and custom lists for your company. For a description of the standard lists, see the table in [Dealer Homepage](#) (on page 299).

The following table describes what you can do from the Dealer List page.

To do this	Follow these steps
Add dealers to books or remove dealers from books	On the Dealer List title bar, click Menu, and select Batch Assign Book. Complete the steps described in <a href="#">Assigning Records to Books</a> (on page 630).
Create a filtered list	On the Dealer List title bar, click the Manage Lists link and select New List. Follow the steps in the New Dealers List wizard and click Finish when you are done.
Create a dealer record	On the Dealer List title bar, click New Dealer. On the Dealer Edit page, enter the required information and save the record.
Create a new Dealer list	On the Dealer List title bar, click Menu, and select Create New List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Export the list	On the Dealer List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a dealer	Click the Name column header to sort the data. Then click a letter in the alphabet bar. For dealers beginning with numbers, click 0-9.

To do this	Follow these steps
Manage all the Dealer lists	On the Dealer List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the Dealer List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show more or fewer records	In the Number of records displayed list at the bottom of the page, specify how many records you want to see at one time.
Show the key information and filter information for the list	On the Dealer List title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> (on page 65).
Update a dealer	Select the record. On the Edit page, update the dealer and save the record.
View a subset of dealers	On the Dealer List title bar, click the picklist and change the selection.
View all dealers	On the Dealer List title bar, click the picklist and change the selection.

### Related Information

See the following topics for related Dealer information:

- [Dealer Homepage](#) (on page 299)
- [Dealer Fields](#) (on page 302)
- [Working with Lists](#) (on page 56)

## Dealer Fields

Use the Dealer Edit page to add a dealer or update details for an existing dealer. The Dealer Edit page shows the complete set of fields for a dealer.

**NOTE:** Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
<b>Key Dealer Information</b>	
Name	Name of the automobile dealer. Limit of 100 characters.
Phone number	The dealer's phone number.
Dealer Type	The dealer type, for example, Truck Dealer. Limit of 20 characters.
Site	The dealer's Web site. Limit of 50 characters.
Email	The dealer's contact e-mail address. Limit of 50 characters.
<b>Additional Information</b>	
Status	The status of the dealer, for example, Active.
Parent Dealer	The parent dealer of the current dealer record.
Currency	The currency of issue.
Ranking	The ranking of a dealer relative to other dealers, typically for sales or service purposes. Limit of 22 characters.
Owner	Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access.  This value affects which records are included in reports you or your managers run.
URL	The dealer's Universal Resource Locator (URL). Limit of 100 characters.
Parent Site	Parent dealer's Web site. Limit of 50 characters.
Stage	The phase of the application and contracting process for the dealer. Default values are: Active, Application Pending, Candidate, and Contract Pending.
Modified By	Name of the person who creates or updates the record, followed by the date and time when the record is created or updated. System-generated.

## Custom Fields

**NOTE:** Company administrators, whose role includes the Customize Application privilege, typically create custom fields.

Any custom field that is created in an Account record appears as the same custom field in the Dealer record, because a Dealer record inherits a custom field in an Account record. However, any custom field that is created in a Dealer record does not automatically appear in the Account record.

If you want to see the same custom field in both the Account view and the Dealer view, your company administrator can create the custom field in the Account record, and make it visible to both the Account view and the Dealer view.

If you do not want to see the same custom field in both the Account view and the Dealer view, your company administrator can create the Account-specific custom field in the Account record, and make the custom field visible only in the Account view.

For more information on custom fields, see [About Custom Fields](#) (on page 557).

### Related Information

See the following topics for related Dealer information:

- [Dealer Homepage](#) (on page 299)
- [Steps for Dealers](#) (on page 300)



# 18 Personalizing Your Application

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As an end-user of the Siebel CRM On Demand application, use the My Setup pages to personalize your Siebel CRM On Demand application. For step-by-step instructions, click one of these topics:

- [Updating Your Personal Details](#) (on page 306)
- [Setting Your Default Search Record Type](#) (on page 311)
- [Setting Your Theme](#) (on page 312)
- [Viewing Audit Trail Fields](#) (on page 312)
- [Managing Your Quota](#) (on page 312)
- [Reviewing Your Sign In Activity](#) (on page 313)
- [Changing Your Password](#) (on page 314)
- [Setting Up Your Security Questions](#) (on page 314)
- [Adding Delegated Users](#) (on page 315)
- [Reviewing Your PIM Sync Activity](#) (on page 315)
- [Granting Sign In Access to Technical Support](#) (on page 316)
- [Displaying Your Tabs](#) (on page 316)
- [Changing Your Detail Page Layout](#) (on page 317)
- [Changing Your Homepage Layouts](#) (on page 317)
- [Changing Your Action Bar Layout](#) (on page 318)
- [Setting Up Your Calendar](#) (on page 319)
- [Embedding a Message Center Widget](#) (on page 321)
- [Embedding a Favorite Lists Widget](#) (on page 320)
- [Embedding a Reports Widget](#) (on page 322)

### Related Information

For additional topics of interest when you are personalizing your application, see the following topics:

- [Importing Your Contacts](#) (on page 160)
- [Using the Offline Edition](#) (on page 326)
- [Synchronizing with PIMs](#) (on page 333)
- [Adding Emails from Microsoft Outlook and Lotus Notes](#) (on page 345)

## Updating Your Personal Details

You can update your personal details, such as your address and phone number. Your company administrator controls the layout and information that you see on your Personal Detail page, consequently there might be differences between the following descriptions and what you see.

**NOTE:** Changes made to your Default Language, Currency, Time Zone, and Country on the Personal Profile pages are not reflected in all reports and analyses until you sign out and sign in again.

### *To update your personal details*

- 1 In the upper right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 In the Personal Detail section, click Edit.
- 5 In the Personal Edit form, update the information.

The following table describes some fields you can review or update:

Field	Description
<b>Key User Information</b>	
First Name	The first name of the user. Limit of 50 characters. This is a required field.
Last Name	The last name of the user. Limit of 50 characters. This is a required field.
Middle Name	The middle name of the user. Limit of 50 characters.
Mr./Mrs.	The salutation of the user.

Field	Description
Reports To	This read-only field indicates the manager of the user.
Status	This read-only field indicates the status of the user. Only active users can access Siebel CRM On Demand.
Job Title	The job title of the user. The information in this field is inherited when added by an administrator.
Region	The region or area where the user is located. Limit of 40 characters.
Subregion	A further refinement of the region or area where the user is located. Limit of 40 characters.
Role	This read-only field indicates the role assigned to the user. A role provides the data access rules and tab layout for the user.
Primary Group	The group to which this user has been added. Read-only.
<b>User Detail Information</b>	
Alias	A short identifier for the user that is used to assign or show ownership on specific record types. For example, enter the user's preferred name or nickname. This is a required field and is set up by the administrator.
User ID	A unique system identifier for a user used in conjunction with Company Sign In ID to sign in to the application. This is a required field, which the administrator sets up.
Email	The complete email address for a user, such as isample@rightequip.com. The email address is used for system notifications such as a reset password notification. This is a required field, which the administrator sets up.
Secondary Email	The secondary email address for the user.
Work Phone #	The user's work telephone number. This is a required field.
Cellular Phone #	The user's cellular phone number.
Company Sign In ID	The company to which the user belongs. This is a default field and is set up at the time the company is created.
User Sign In ID	The ID with which the user signs in to the application. This is a required field and is set up by the administrator.
<b>Contact Preferences</b>	
Never Call	Select this check box if you do not want to receive calls from CRM On Demand Marketing.

Field	Description
Never Mail	Select this check box if you do not want to receive mails from CRM On Demand Marketing.
Never Email	Select this check box if you do not want to receive emails from CRM On Demand Marketing.
<b>User Geographic Information</b>	
Language, Locale, Currency, Time Zone	Your administrator sets up the default settings for these items. You can override the defaults by clicking the picklist for each item, and selecting the value that you want.
<b>User Security Information</b>	
Reporting Subject Areas	<p>Use this picklist to set your visibility to real-time report records in Siebel CRM On Demand Answers. These reports provide real-time analyses of data. You can select one of the following values:</p> <p>Manager Visibility - Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows you to see your own data, plus data shared with you by the Account and Opportunity Team.</p> <p>If you do not define the Reporting Subject Areas setting, the company-wide setting that is set up by your company administrator applies. For more information on reports, see <a href="#">About Reports</a> (on page 362), particularly the About Visibility to Records topic.</p>
Historical Subject Areas	<p>Use this picklist to set your visibility to analyses report records in Siebel CRM On Demand Answers. These reports have to do with historical or trend analyses, or contain more complex calculations than those found in real-time reports. You can select one of the following values:</p> <p>Manager Visibility - Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows you to see your own data, plus data shared with you by the Account and Opportunity Team.</p> <p>Full Visibility - This setting combines Manager and Team Visibility.</p> <p>If you do not define the Historical Subject Areas setting, the company-wide setting that is set up by your company administrator applies. For more information on reports, see <a href="#">About Reports</a> (on page 362), particularly the About Visibility to Records topic.</p>
External Identifier for Single Sign On	Read-only. For more information, see <a href="#">Setting Up Your Company Profile and Global Defaults</a> (on page 529).

Field	Description
Last Sign In	A system-generated field. For information on reviewing all your sign-in attempts, see <a href="#">Reviewing Your Sign In Activity</a> (on page 313).
<b>Additional Information</b>	
Default Search Record Type	This picklist allows you to change the default search record type to display in the Action bar search. (For example, change Contact to Account or another record type that you can access.) The action bar search box defaults to this record type every time you sign in to the application regardless of where you left it the last time you were signed into the application.
Enable Sync of Team Contacts	Determines if you want the PIM Sync application to include the synchronizing of contacts that the user owns, as well as all the contacts that the user has access to using Contact Teams. Selecting this option prevents duplicate records from being created, because each team member is synchronizing with the same contact record in Siebel CRM On Demand. For more information, see <a href="#">Sharing Records (Teams)</a> (on page 68).
Display Click-to-Dial Popup	This check box is for users that are set up with the Call Center On Demand (CCOD) application. CCOD renders phone numbers as links that you can click on the List and Detail pages. If you select the Display Click-to-Dial Popup check box, and then click a phone number link, you are prompted with a Click-To-Dial window before the CCOD telephony system places the call. For more details on placing internal or external calls, see <a href="#">Placing Calls</a> (on page 236).
Theme Name	This picklist allows you to select the available application-wide themes for your application. A theme changes the look and feel of the application, including its background color, hyperlinks, and icons. A blank value means that you have to use the theme that your company administrator has set in the company profile. The available themes are: Classic, Contemporary, or Oracle.
Show Welcome Page on Sign In	This check box allows you to specify whether the Siebel CRM On Demand Welcome Page is displayed when you sign in to the application.

**6** Save the record.

**Note:** You must sign out and in again to activate some of the changes (Language, Locale, Time Zone, and Currency).

For information on other fields, see [User Fields](#) (on page 613).

## About Profile Settings for Users

Each company has at least one designated company administrator, who sets up and customizes Siebel CRM On Demand for their entire organization. Company administrators initially set up some defaults that every user inherits, but each user can override these initial default settings. The following table describes what the settings affect.

**CAUTION:** If company administrators change the Language, Currency, Country, or Time Zone settings for their company, they must contact Siebel Customer Care. Otherwise, their company's reports and forecasts are run with the previous settings.

Setting Name	Description
Time Zone	The application supports Universal Time Code (UTC) so that all times and dates are shown according to the user's time zone. For example, an appointment scheduled for 11:00 a.m. PST displays as 2:00 p.m. for a user whose setting is EST, because of the three-hour time difference.
Locale	The Locale setting determines the formatting for numbers, currencies, phone numbers, times, and dates. For example, users who select the German - Germany locale setting see currency amounts that display 110.000,00, whereas users who select the English - United States setting see the same amount as 110,000.00. Users should select the format they are most comfortable with.
Language	The Language setting allows users to change the language for the user interface, online help, and tutorials. Depending on the company's default language, users may see certain items in reports in a language other than their default.
Currency	<p>The Currency setting provides the default currency amount linked with all new records the user creates. When a user views revenue reports, they display in the user's default currency. If a manager sees cumulative revenue from users with different currencies, she sees the amount in her default currency (company administrators must set up exchange rates for this to occur).</p> <p>However, forecasts are always rolled up to the company's default currency. For example, a user with U.S. dollars as his default currency sees his forecast converted to euros, if his company's currency is euros.</p>
Country	The Country setting affects the default address format that is used when a user creates a new record. For example, if a user with a default country of France creates a new record, the French template is used. The application has address templates specific to over 60 countries.

Setting Name	Description
Phone	<p>The Phone formatting is determined by the Locale setting. The application adjusts for out-of-the-area phone numbers so that users see the entire sequence they need to dial. For example, a user in the U.S. is required to dial 011 when dialing internationally. Therefore, when a user enters +44 3333 333 333 for the United Kingdom, the number displays as 011 +44 3333 333 333.</p> <p><b>NOTE:</b> Users should enter the prefix plus sign (+) before international numbers.</p> <p>Phone fields have a phone icon next to them. Clicking on the icon opens a phone verification window, which allows users to verify if the application has correctly identified the number: country code, city/area code, local number, and any extension for the number. Closing that window prompts the application to enter the correct dialing sequence.</p> <p>Additionally, if users want to determine the country code for a country, they can click the phone icon, select the country, and save the information. The country code for the country displays in the Phone field.</p>

**NOTE:** When users change these settings, they need to sign out and in again for the application to display data with the new settings.

## Setting Your Default Search Record Type

You can set your default search record type from your personal profile information. For example, you might want to modify your default search record type for your targeted searches from a Contact record to an Account record. For more information on using searches with CRM On Demand, see [Finding Records](#) (on page 35). To set your default search record type, complete the steps in the following procedure.

### *To set your default search record type*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link, and click Edit.
- 4 Scroll down to the Additional Information section.
- 5 Select the record type that you want in the Default Search Record Type picklist.
- 6 Save the record.

**Note:** You must sign out and sign in again to CRM On Demand to see the changes.

## Setting Your Theme

You can set your default UI Theme from your personal profile information to an available theme such as Classic or Contemporary, or to a custom theme. A blank theme indicates that your company administrator has set a company-wide theme in the company profile; in this case, you have to use the company theme.

To set your theme, complete the steps in the following procedure.

### *To set your theme*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link, and click Edit.
- 4 Scroll down to the Additional Information section.
- 5 Select the theme that you want in the Theme Name picklist.
- 6 Save the record.

## Viewing Audit Trail Fields

To view the sign-in activity for applications, such as Web services and PIM Sync, complete the steps in the following procedure.

### *To view audit trail fields*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 Scroll down to the Audit Trail section to review the fields that are enabled for audit.

## Managing Your Quota

Either you or your company administrator can set up your quotas. As an end user, you do not require any special privilege, however your company administrator requires the Manage Users and Access privilege to set up your quota.



You can review and modify existing quotas or enter new quotas and calculate them by:

- Entering a yearly quota, which the system spreads evenly over the year
- Entering a quota for each month, which the system totals for the year

You can make a quota active at any time. After you activate a quota, Siebel CRM On Demand uses the quota information to populate fields in the Forecasting pages. It saves your targets for each year, allowing you to review your target history and compare your forecasts against your quotas. For additional information, see [Managing Quotas](#) (on page 197).

**NOTE:** You can have more than one active quota per year. Since only active quotas are used when creating your forecast, make sure that you activate all of the quotas that you want included in your forecast.

### *To define your quota*

- 1 In the upper-right corner of any page, click the My Setup global link.
  - 2 In the Personal Profile section, click the Personal Profile link.
  - 3 In the Personal Information section, click the My Profile link.
  - 4 In the Quotas section, click New Quota.
  - 5 In the Edit Quota form, enter the Year and Name for the quota.
  - 6 Do one of the following:
    - To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
    - To add the monthly quotas together, enter an amount for each month and click Sum.
- NOTE:** Clicking Sum adds all monthly quota entries and displays the total in the Total field.
- 7 Save the record.

## Reviewing Your Sign In Activity

You can review all of your sign in activity, for example, the number of times you signed into the application.

### *To review sign in activity*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.

- 3 In the Personal Information section, click the My Profile link.
- 4 In the Personal Details page, scroll down to the Sign In History section to review your sign-in activity. This activity includes your sign-in activity from other applications including Office, Outlook Email Integration, and so on.

## Changing Your Password

Siebel CRM On Demand allows you to change your password at any time, provided that your role includes the Reset Personal Password privilege. You should review the appropriate guidelines before making any changes to your password. Typically, the guidelines are set by the company administrator and are subject to update.

**Note:** If your company has implemented a solution where you must use Single Sign-On (SSO) to access CRM On Demand, you need to reset your password through that system, and not in CRM On Demand.

### *To change your password*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the Password Update link.
- 4 In the Password Update section, fill in the fields.
- 5 Save the record.

## Setting Up Your Security Questions

If you forget your password and want to access Siebel CRM On Demand, you must correctly answer at least one of the security questions that you define in this procedure. You must supply these security questions and answers before you sign in.

### *To set up your security questions*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 On the Personal Profile page, click the My Security Questions link.
- 4 Select the questions, and enter the answers.  
An answer cannot exceed 29 characters.
- 5 Save the record.

## Adding Delegated Users

You can have a user impersonate you by adding that user to the delegated users list. This is a useful feature if a user who supports multiple people wants to see all of the records belonging to those people. Your company administrator typically enables this feature.

**NOTE:** To delegate users on your behalf, an administrator requires the Manage Users and Access - Manage Delegated Users privilege.

### *To add delegated users*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 Scroll down to the Delegated Users section, and click Add Users.  
**NOTE:** If you do not see the Delegated Users section, your company administrator can add it to your view.
- 5 In the Delegated Users Edit page, click the Lookup icon to select the users that you want to add to the Delegated Users list.
- 6 If you want to designate a role for this user, select a role from the Delegated User Role picklist.
- 7 Click Save.

## Reviewing Your PIM Sync Activity

You can review your activity with PIM Sync. This allows you to track how often you synchronize records between PIMs (Personal Information Managers) such as Siebel CRM On Demand and Microsoft Outlook, Lotus Notes, and your Palm Handheld. For more information, see [Synchronizing with PIMs](#) (on page 333).

**NOTE:** Your company administrator sets up PIM Sync, and clients such as Microsoft Outlook Email Integration (OEI) and the Offline client for your company.

### *To review PIM Sync activity*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the My Profile link.
- 4 Scroll down to the Audit Trail section to review your PIM Sync activity.

## Granting Sign In Access to Technical Support

You can grant permission for a Siebel CRM On Demand Technical Support Representative to access your session. This might be necessary to allow the support representative to troubleshoot a problem.

### *To grant sign in access to others*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Personal Profile section, click the Personal Profile link.
- 3 In the Personal Information section, click the Sign In Access link.
- 4 On the Sign In Access page, enter a date and time range for the period of time you are allowing that person to have access to your session.
- 5 Save the record.

**Note:** If you want to terminate sign in access prior to the Access End Date that you specified, and you have already granted access using this feature, enter a new date and time range with dates that are in the past.

## Displaying Your Tabs

The tabs across the top of your pages provide the starting point for managing your data. The role your administrator assigns to you determines what tabs are available to you and the order in which they initially appear. You can change the order of the tabs or hide ones that you do not want to access.

### *To change your tab order*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Layout Personalization section, click the Personal Layout link.
- 3 In the Personal Tab Layout section, click the Tab Layout link.
- 4 In the Available Tabs box, select the tab you want to add, and then click the right arrow button to move it from the Available Tabs box to the Selected Tabs box.

**NOTE:** You can select more than one tab at a time by holding down the SHIFT or CTRL key when you click to select the tabs.

- 5 In the Selected Tabs area, select one tab at a time and use the up arrow button or down arrow button to move the tab until it appears in the order you want.
- 6 Save the record.

## Changing Your Detail Page Layout

Your administrator determines the type and order of the related information that appears on each Detail page. Related information shows the different records, such as notes or activities, that can be linked to the selected record. For example, notes and activities are related information that can be linked to opportunities or contacts.

You can change the order of the related information or hide any related information that you are not using. Changing these settings affects only your view of the application.

### *To edit the layout of your Detail pages*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Layout Personalization section, click the Personal Layout link.
- 3 In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.
- 4 Move the sections (content) you want to appear from the Available Related Information area to the Displayed Related Information area.
- 5 In the Displayed Related Information area, move the sections up or down until they show the order you want.
- 6 Save the record.

**NOTE:** From your Detail pages, you can also edit the page layout by clicking the Edit Layout link in the upper right corner. Clicking the Edit Layout link takes you to the edit layout page for each tab.

## Changing Your Homepage Layouts

If your user role includes the Personalize Homepages privilege, you can add and remove sections from your Homepage layouts (My Homepage, Account Homepage, Contact Homepage, Lead Homepage, Opportunity Homepage, and Service Request Homepage). Your company administrator configures the Homepage layouts that you see by default.

**NOTE:** You can also personalize Homepages by clicking the Edit Layout link on each Homepage.

### *To change your Homepage Layout*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Layout Personalization section, click Personal Layout.
- 3 In the Personal Layout page, click the Homepage Layout that you wish to modify in the Personal Homepage Layout section (for example My Homepage Layout).
- 4 Select the information you want to appear on the home page that you selected.
- 5 Select the section that you want to display on your Homepage under Available Sections.
- 6 Move the section to the Left Side or Right Side sections using the arrows.
- 7 You can also move the section up or down on the Homepage by using the up or down arrow.
- 8 Save the record.

## Changing Your Action Bar Layout

You can control the layout of the action bar that appears on the left-hand side of all Siebel CRM On Demand pages.

### *To change your Action Bar Layout*

- 1 In the upper-right corner of any page, click the My Setup global link.
- 2 In the Layout Personalization section, click Personal Layout.
- 3 In the Personal Layout page, click Action Bar Layout in the Personal Action Bar Layout section.  
  
By default, all available sections are displayed (Search, Create, Recently Viewed, Favorite Records, and Favorite Lists). To remove any sections from actively displaying, use the left arrow to move the section from Displayed Section to Available Section.
- 4 In the Customize Favorites section of this page, you can modify the Action Bar to add new favorites to the start or the end of a favorites list (Favorite Records or Favorite List). Click one of the following buttons (if required):
  - At the end of the list
  - At the start of the list  
For more information on Favorite Records, see the [Favorite Records Page](#) (on page 55). For more information on Favorite Lists, see the [Favorite Lists Page](#) (on page 66).
- 5 Save the record.

## Setting Up Your Calendar

To set up your calendar, complete the steps in the following procedure. For more information on calendars, see [Calendar and Activities](#) (on page 87).

### *To set up your calendar*

- 1** In the upper right corner of any page, click the My Setup global link.
- 2** In the Calendar Setup section, click Calendar Settings.
- 3** To select the calendar view you would like to display by default on the calendar home page:
  - a** Click Default Calendar View.
  - b** From the Default Calendar View drop-down, select a calendar view.
- 4** To share your calendar with another user:
  - a** Click Share Calendar.
  - b** In My Calendar Share List, click Add Users.
  - c** In the Grant New Users window, use the Lookup icon to add users with whom you want to share your calendar.
- 5** To set up custom group calendar views:
  - a** Click Manage Group Views.
  - b** In My Custom Views, click Add.
  - c** Complete the fields in the Manage View window.

Setting up custom group calendar views allows you to manage your view to other users availability. When you create a new appointment, go to the Group Calendar tab and select the Calendar group you or your administrator created to view availability.
- 6** Save the record.

## Data and Integration Tools

Click the topic you are interested in:

- [Importing Your Contacts](#) (on page 160)
- [Using the Offline Edition](#) (on page 326)

- [Synchronizing with PIMs](#) (on page 333)
- [Adding Emails from Microsoft Outlook and Lotus Notes](#) (on page 345)
- [About On Demand Widgets](#) (on page 320)

## About On Demand Widgets

CRM On Demand provides you with HTML code that you can use to embed a number of On Demand widgets in desktop applications that support Web widgets. You can also embed Web widgets in portals, or in any standalone Web page. A Web widget is a portable piece of third-party code that can be embedded in HTML. If your company administrator has made this feature available to you, HTML code that you can use to embed On Demand widgets in other applications is provided in the My Setup page in CRM On Demand.

When you successfully embed this HTML code in your application, a CRM On Demand login window appears. Then, you can enter your login details to access your CRM On Demand Favorite Lists, Message Center, and so on. You can open the CRM On Demand application in a new browser window by clicking Open Application.

**Note:** This feature is available in your CRM On Demand application only if it is enabled by your company administrator. To confirm if this feature is enabled in your CRM On Demand application, navigate to My Setup. If it is enabled, Embed On Demand Content is displayed. If your company administrator has not assigned you permission to use On Demand widgets, and you try to log in to an On Demand widget, the login fails.

The following On Demand widgets are available:

- **Favorite Lists Widget.** This On Demand widget displays your favorite CRM On Demand lists, for example, All Opportunities, My Accounts, and so on. Favorite Lists are located in the Action Bar of the CRM On Demand Homepage. For more information on embedding the Favorite Lists Widget, see [Embedding a Favorite Lists Widget](#) (on page 320).
- **Message Center Widget.** This On Demand widget allows you to access messages received in CRM On Demand without requiring you to first log in to the CRM On Demand application. The Message Center is located in the Action Bar of the CRM On Demand Homepage. For more information on embedding the Message Center Widget, see [Embedding a Message Center Widget](#) (on page 321).
- **Reports Widget.** This On Demand widget displays reports created in CRM On Demand. For more information on embedding the Reports Widget, see [Embedding a Reports Widget](#) (on page 322).

## Embedding a Favorite Lists Widget

You can embed your CRM On Demand favorite lists widget, for example, All Opportunities, My Accounts, and so on, from your CRM On Demand application in desktop applications that support widgets. You can also embed them in portals and in standalone Web pages.



**Note:** This feature is available in your CRM On Demand application only if it is enabled by your company administrator.

#### *To embed Favorite Lists*

- 1 Navigate to My Setup.
- 2 Click Embed On Demand Content.
- 3 From the Favorite Lists Widget section, copy the HTML code to your application.  
When you successfully embed this HTML code in your application, a CRM On Demand login window appears.
- 4 Enter your On Demand login details to access your Favorite Lists data.

You can use the Add to Google button to quickly add this widget to Google™. For more information about using CRM On Demand widgets on mashup sites, see [Example of Embedding On Demand Widgets](#) (on page 322). A mashup is a Web-based application that combines data from more than one source.

## Embedding a Message Center Widget

This On Demand widget allows you to embed a Message Center in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages. Using this On Demand widget you can access the messages received in CRM On Demand without logging in to the CRM On Demand application. The Message Center is located in the Action Bar of the CRM On Demand Homepage.

**Note:** This feature is available in your CRM On Demand application only if it is enabled by your company administrator.

#### *To embed Message Center*

- 1 Navigate to My Setup.
- 2 Click Embed On Demand Content.
- 3 From the Message Center Widget section, copy the HTML code to your application.  
When you successfully embed this HTML code in your application, a CRM On Demand login window appears.
- 4 Enter your CRM On Demand login details to access the messages in your Message Center.
- 5 Click Refresh to access the new messages.

You can also add this On Demand widget to the Google Desktop. For more information on using On Demand widgets, see [Example of Embedding On Demand Widgets](#) (on page 322).

## Embedding a Reports Widget

This On Demand widget allows you to embed CRM On Demand Reports in desktop applications that support Web widgets. (You can also embed Dashboard widgets.) You can also embed them in portals and in standalone Web pages without requiring you to log in to the CRM On Demand application.

**Note:** This feature is available in your CRM On Demand application only if it is enabled by your company administrator.

### *To embed reports and dashboards*

- 1 Navigate to My Setup.
- 2 Click Embed On Demand Content.
- 3 In the Reports Widget section, select Report or Dashboard from the menu.
- 4 In the Path field, enter the paths of the reports (or dashboards) that you want to display.

**NOTE:** These paths must be separated by colons (:). For more information on creating report paths, see [Creating Homepage Custom Reports](#) (on page 579).

- 5 Click Update HTML.
- 6 Copy the HTML code to your application.

When you successfully embed this HTML code in your application, a CRM On Demand login window appears.

- 7 Enter your CRM On Demand login details to access your reports (or dashboards).

For more information on reports, see [Reports](#) (on page 361). For more information on dashboards, see [Dashboards](#) (on page 499).

## Example of Embedding On Demand Widgets

This topic describes how to embed an On Demand widget using iGoogle as an example. CRM On Demand provides an Add to Google button, which allows you to add Favorite Lists and Message Center to your iGoogle page. CRM On Demand also has configured XML files that allow you to add Favorite Lists and Message Center to Google Desktop.

*To embed the Message Center Widget in a mashup site*

- 1 Navigate to My Setup.
- 2 Click Embed On Demand Content.
- 3 Click Add to Google under Favorite Lists Widget.  
A browser window opens.
- 4 Select See this gadget when you visit Google.com.  
**TIP:** Review the other check boxes displayed on this page, and select your preferences for iGoogle accordingly.
- 5 Click Add to Google.  
The main iGoogle Web page opens.  
A CRM On Demand login window appears for the Message Center.
- 6 Enter your CRM On Demand login details to access the Message Center.

*To embed Message Center in Google Desktop*

- 1 Right-click the Google Desktop taskbar, and select Add Gadgets.  
The Add Gadgets window appears.
  - 2 Enter the following URL into the search field:  
`http://crmondemand.oracle.googlepages.com/oracle_msgcntr_1_0.xml`
  - 3 Click the search icon.  
The CRM On Demand Message Center icon is displayed.
  - 4 Click Add.  
The Message Center is added to your Google Desktop.
  - 5 Enter your CRM On Demand login details to access the Message Center.
- For more information on the Message Center, see [Working with the Message Center](#) (on page 29).



# 19 Working with Other Applications

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Siebel CRM On Demand works with these applications to provide additional functionality:

- Offline edition of Siebel CRM On Demand

You can copy accounts (and their linked contacts and opportunities), tasks, and appointments to an Offline edition of Siebel CRM On Demand on your laptop or desktop. This allows you to work offline, disconnected from the Internet. When you reconnect to the Internet, you can upload your changes to your company's Siebel CRM On Demand application.

- Personal Information Managers (PIM)

You can copy your contacts, tasks, and appointments from Siebel CRM On Demand to Microsoft® Outlook, Lotus Notes, and your Palm handheld and vice-versa. After updating those records, you can run a synchronization session to keep those records consistent between the two applications. The software you use for this feature is Siebel PIM Sync On Demand.

- Microsoft® Outlook and Lotus Notes

Through Siebel Outlook Email Integration On Demand, you can also link specific emails to Account, Contact, Lead, Opportunity or Service Request records in Siebel CRM On Demand. This allows you to store critical emails with the records they pertain to.

- Microsoft® Word

You can use your Siebel CRM On Demand data to create mail merges and mass email in Microsoft Word using Siebel CRM On Demand Integration for Office.

- Microsoft® Excel

You can create refreshable offline Microsoft Excel reports containing your Siebel CRM On Demand data using Siebel CRM On Demand Integration for Office.

## Checking Your System Requirements

Make sure your computer meets the system requirements before you install the software.

### *To check the system requirements*

- 1 From any page in Siebel CRM On Demand, click the My Setup link.
- 2 On the Personal Homepage, click the Data & Integration Tools link.
- 3 On the Data & Integration Tools page, click the link for the procedure you're interested in.
- 4 In the System Requirements section on the page that appears, make sure your hardware and software meet the listed requirements.

## Using the Offline Edition

The Offline edition of Siebel CRM On Demand lets you do much of your work, such as adding accounts, updating opportunities linked to accounts, marking tasks as completed, and setting up appointments, while you are disconnected from the Internet.

To do so, you copy or *download* the records from Siebel CRM On Demand to your computer. When you download records, you can limit the records to include, based on criteria you set up.

After downloading, you can view or update those records as well as create new records while working offline. The interface is similar to the main Siebel CRM On Demand application, but it offers a subset of the functionality that the main application has.

When you reconnect to the Internet, you can upload the new record information to your company's Siebel CRM On Demand application. The process of keeping both sets of records consistent is called *synchronization*.

**NOTE:** To use the Offline edition, you must have the Enable Offline Access privilege.

Related Topics	
What Records You Can Use Offline	327
Installing the Offline Edition	328
Downloading Records to Your Offline Edition	330
Uploading Records From Your Offline Edition	332
About Conflict Resolution with the Offline Edition	332

## What Records You Can Use Offline

You can download a subset of the total information you have access to in Siebel CRM On Demand. The following table shows you what record types you can download or upload, and the records that are linked with those records.

This record type	Contains the following record types when downloaded or uploaded	Which also contains the following record types
<b>Accounts</b>	<ul style="list-style-type: none"> <li>Opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Contacts</li> <li>Appointments</li> <li>Tasks</li> </ul>
	<ul style="list-style-type: none"> <li>Contacts</li> </ul>	
	<ul style="list-style-type: none"> <li>Completed Activities, such as Appointments and Tasks. Due Date falls between Today and 2 months into the past.</li> </ul>	
	<ul style="list-style-type: none"> <li>Open Activities</li> </ul>	
<b>Contacts</b>	<ul style="list-style-type: none"> <li>Accounts</li> </ul>	<ul style="list-style-type: none"> <li>Opportunities</li> <li>Contacts</li> <li>Appointments</li> <li>Tasks</li> </ul>
	<ul style="list-style-type: none"> <li>Opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Contacts</li> <li>Appointments</li> <li>Tasks</li> </ul>
	<ul style="list-style-type: none"> <li>Open Activities</li> </ul>	
	<ul style="list-style-type: none"> <li>Completed Activities, such as Appointments and Tasks.</li> </ul>	
	<ul style="list-style-type: none"> <li>Related Contacts</li> </ul> <p>Related Contacts is not part of the standard application</p>	
	<ul style="list-style-type: none"> <li>Contact Relationship</li> </ul>	

This record type	Contains the following record types when downloaded or uploaded	Which also contains the following record types
Opportunities	<ul style="list-style-type: none"> <li>Contacts</li> </ul>	<ul style="list-style-type: none"> <li>Accounts</li> <li>Contacts</li> <li>Appointments</li> <li>Tasks</li> </ul>
	<ul style="list-style-type: none"> <li>Open Activities</li> </ul>	
	<ul style="list-style-type: none"> <li>Completed Activities, such as Appointments and Tasks.</li> </ul>	

## Installing the Offline Edition

**Before you begin.** All users except those with the Service Representative or Service Manager roles have the Offline privilege enabled to install the Offline edition of Siebel CRM On Demand. You may set up the Service Representative and Service Manager roles with the privilege required to install the Offline Edition using role management. Make sure your computer meets the system requirements shown in the System Requirements section in Siebel CRM On Demand. For the path to that page, see [Working with Other Applications](#). (see "Working with Other Applications" on page 325)

To use the Offline edition of CRM On Demand, install it on your laptop or desktop computer.

### *To install the Offline edition*

- 1 Sign in to Siebel CRM On Demand.
- 2 Click the MySetup link at the top of any page.
- 3 On the Personal Homepage, click the Data & Integration Tools link.
- 4 On the Data & Integration Tools page, click the Siebel Offline On Demand link.
- 5 On the Siebel Offline On Demand page, read the information and then click the Download Siebel Offline On Demand link.
- 6 Repeat Step 5.



- 7 In the window, you can:
  - Click Save to copy the Offline\_OnDemand.exe file to your hard drive to install while you are offline. (Recommended)
  - Click Run to begin the installation. You need to stay connected to the Internet to continue with the installation.

- 8 Follow the instructions to complete the installation.

- 9 If you copy the file, open the Offline\_OnDemand.exe file.

If you accept the default location, the Offline\_OnDemand.xls file is saved in the c:\Siebel\Offline OnDemand folder.

- 10 If you receive a message about enabling macros when opening Offline\_OnDemand.xls, make sure you enable macros and select the option to always trust macros from Oracle.

**Tip:** When you work offline, the Offline On Demand icon on your taskbar is a Microsoft Excel icon.

If you have problems opening the Offline Edition, do the following:

- **If you are receiving compatibility errors.** Open Microsoft Excel. In the Excel window, click Open file, and select Offline Client in the browser window.
- **If you see a run-time error on the screen, or if the Offline Edition is open, but you cannot see it.** Do the following:
  - a Close the Offline Client.
  - b Click the main Excel menu at the top of the screen.
  - c Select Excel Options.  
The Excel Options window opens.
  - d Select Trust Center in the navigation pane.
  - e Click Trust Center Settings.  
The Trust Center Settings window opens.
  - f Click ActiveX Settings in the navigation pane.
  - g Select Enable all controls without restrictions and without prompting.
  - h Click Macro Settings in the navigation pane.
  - i Select Disable all macros except digitally signed macros.
  - j Click OK, and close Microsoft Excel.
  - k Open the Offline Client.

## Downloading Records to Your Offline Edition

### Before you begin:

- In Siebel CRM On Demand, set up the filtered lists that you want to use to restrict the Account, Contact or Opportunity records that are downloaded to your computer. For instructions, see [Working with Lists](#) (on page 56).
- You can download 250 accounts, or, 750 contacts or opportunities at one time. If your records exceed that number, use filtered lists to divide your records into a smaller number, such as accounts based on different Priority values or on location.  
**NOTE:** Your company administrator can request an increase in the number of records available for download. However, increasing the number will increase the amount of time it takes to complete the download process.
- Date and time are determined by regional settings on your computer. Within regional settings, it is possible to change the formatting of the default date and time. The separators for date and time cannot be the same. If they are the same, the downloading of records to Offline CRM On Demand fails. For example, you cannot use dashes to separate the day and month for dates and also to separate the hour and minute for time.
- You must be connected to the Internet to download or upload your records.

After installing the Offline edition, download the records you want to use while working offline. The complete set of records that you can download consists of those you own, and those shared with you and with team members.

### *To download records*

- 1 Open the Offline edition.
- 2 Click the Enable Macros button in Excel.
- 3 Click the Download button.
- 4 When prompted to sign in to Siebel CRM On Demand, enter your user ID and password.

**NOTE:** You must set up your security credentials properly for Siebel CRM On Demand, including the security questions. If you do not do this, a Page Not Found error might be displayed on screen.

- 5 Do one of the following:

- For Accounts, select which Accounts you want to download from the drop-down list.

All the lists you or your managers created for you appear in the drop-down list in the Offline edition.

**NOTE:** Activities created on an account are accessible depending on who created them. If you want to view the activities that you created for an Account, only the activities from the past year are available. However, if you want to view activities created by another user, only those activities from the

- past 60 days are available for viewing. What you can view in On Demand depends on your access rights. For further information see your administrator.
- For Contacts, select which Contacts list you want to download from the drop-down list.
  - For Opportunities, select which Opportunities list you wish to download from the drop-down list.
- 6 If you want to download appointments and tasks, select the Tasks and Appointments you wish to download from the appropriate drop-down arrow.
- NOTE:** The lists for Tasks and Appointments are built into the product and cannot be changed. You always receive Tasks and Appointments from the previous two months, unless you select the extended Task and Appointment download. In this case, you receive activities from the past year.
- 7 Click Download.
- Progress bars indicate how the three-step download process is progressing:
- a Server request to retrieve data.
  - b Gathering of data for the Offline edition.
  - c Process the data within Offline edition.
- When the process is complete, a message notifies you that your download is successful.
- TIP:** If an error message appears, navigate to the Offline directory to check the error log for the specific error message.

## Adding and Updating Records in Your Offline Edition

You can add or update records in your Offline edition and later upload them to Siebel CRM On Demand.

**Before you begin.** Make sure the time zone on your laptop or desktop computer is set to the same one used in your Siebel CRM On Demand application. For instructions on viewing your time zone in Siebel CRM On Demand, see [Updating Your Personal Details](#) (on page 306).

Adding and updating records works the same way in your Offline edition as it does in the main application.

- You can add records from the Create box in the left Action bar or wherever you see a New button on a page.
- You can update records wherever you see an Edit button or an Edit link.

**TIP:** The Offline Status information on the left displays the number of changes you make while working offline.

### Related Topics

Uploading Records From Your Offline Edition 332

## Uploading Records From Your Offline Edition

After you add or update records in the Offline edition, you want to upload the new information to your company's Siebel CRM On Demand application.

**NOTE:** Deleting records must be done from Siebel CRM On Demand, not the Offline edition. Also, if you want to transfer the ownership of the account from yourself to another employee, upload the account first, and then change the owner in Siebel CRM On Demand. (If you transfer ownership, you will not be able to edit the record after it is saved in the Offline edition.) You can upload changes to an account only if you own it, or if it has been shared with you by the owner through the Account Team or Book feature.

**Before you begin.** You must be connected to the Internet to upload your records.

### To upload records

- 1 In the Offline edition, click the Upload button.
- 2 Sign in to Siebel CRM On Demand.  
A progress bar appears, followed by a message notifying you of a successful upload. If you receive an error message, the uploading process continues but ignores the records with the conflicting changes.
- 3 When the upload is completed, you are prompted to perform a download.  
**NOTE:** You must download a new data set otherwise your Offline edition will be read-only.
- 4 Click Yes and continue with the download.

### Related Topics

About Conflict Resolution with the Offline Edition 332

## About Conflict Resolution with the Offline Edition

Conflicts occur at the *field level* when the same field in the same record has been updated in Siebel CRM On Demand and the Offline edition. For example, another employee might update an email address in Siebel CRM On Demand while you updated the same email address in the Offline edition. This is a conflict that is recognized during the synchronization.

By default, the field change in Siebel CRM On Demand wins over your changes. However, if an error cannot be resolved by this rule, you need to address each issue manually. To review the errors, open the UploadError file in the Offline On Demand directory or print it.

## Synchronizing with PIMs

You can synchronize contacts, appointments, and tasks between Siebel CRM On Demand and the following PIMs:

- Microsoft® Outlook 2002, 2003.
- Lotus Notes 6.0/6.5/7.0
- Palm Desktop 4.x

This allows you to update contact records, schedule appointments, and keep To-Do lists in either application and then synchronize the information.

To do so, you first install the software that allows for the synchronization, which is Siebel PIM Sync On Demand. Using the sync software, you then do the initial synchronization between Siebel CRM On Demand and the PIM. You can then make changes, such as adding a contact or updating a contact's business phone number from either application. Finally, you run Siebel PIM Sync On Demand again so that the information in both Siebel CRM On Demand and the PIM is consistent, and updates made by other employees in Siebel CRM On Demand are downloaded to the PIM.

**NOTE:** To install and run the sync software, you must have administrator rights that allow you to install software on your desktop.

**NOTE:** To use Siebel PIM Sync On Demand, you must have the Enable PIM Sync Access privilege.

### About Contacts

New and updated contact records are synchronized between the PIM and Siebel CRM On Demand.

**Deleting contacts.** You should delete contacts from Siebel CRM On Demand, not from the PIM. Otherwise, during the next synchronization, the contacts from Siebel CRM On Demand are added again to the PIM.

**Address information.** The business address fields in the PIM are mapped to the alternate address fields in Siebel CRM On Demand. Home address information is not synchronized.

**Searching Account information.** You may have an account or company associated with a contact in the PIM. During synchronization, the application attempts to match this account or company with an existing account in Siebel CRM On Demand. The application uses Fuzzy Matching to search for accounts. Fuzzy Matching is enabled by default for existing customers and is disabled by default for new customers. To enable or disable Fuzzy Matching, navigate to Admin > Company Administration > Company Profile > Company Security Settings and select or unselect Disable PIM Sync Extended Account Association as necessary.

If Fuzzy Matching is disabled, the application searches for an exact match to the requested account, and performs the following actions:

- If only one account is found, the application associates the requested account with the account that was found.
- If more than one account is found, the application associates the requested account to an account from the search results with no specified location.
- If more than one account is found, and all the accounts have specified locations, the application creates a new account for the requested account and uses it.

If Fuzzy Matching is enabled, the application performs the following actions:

- It searches for an exact match to the account. This is the same action that is performed when Fuzzy Matching is disabled.
- If no exact match is returned, the application performs a further search, this time embedding wildcards, for matches similar to the search string.

For example, if the account name has special characters, such as an underscore, comma, dot, and so on, the application replaces them with a wildcard character such as an asterisk. If the requested account is "I.B.M. Hardware Division", the application returns a match like "Italian BM Hardware Division 132426".

If the name does not contain special characters, the application appends one wildcard character to the end of the requested account. If the requested account is "IBM Hardware Division", the application returns a match like "IBM Hardware Division (Global Operation)".

- If no similar match is returned, the application creates and uses a new account for the requested account.

If you click Disable PIM Sync Account Association, this action disables all searching for an Account match. Instead, it populates the PIM Company Name field on the Contact record.

**NOTE:** Fuzzy Matching is case-sensitive. It is your responsibility as a user to verify if the requested account is correctly associated to the matched account if Fuzzy Matching is enabled.

## About Appointments and Tasks

New, updated, or deleted appointment and task records are synchronized between the PIM and Siebel CRM On Demand.

**Group meetings.** Employees at your company can set up a group meeting in the PIM and then add it to Siebel CRM On Demand during synchronization. If you delete that meeting in Siebel CRM On Demand and then sync again with the PIM, this is what happens:

- If you are the owner of the record (you set up the meeting), the appointment is deleted from your PIM calendar. However, the group meeting is retained in the attendees' PIM calendars.
- If you are *not* the owner of the group meeting but are one of the attendees, the appointment is also deleted in your PIM calendar. However, your name remains on the attendee list in the others' PIM calendars.

**Recurring appointments and tasks.** You must manage *recurring appointments* through your PIM. During the synchronization, they are uploaded to Siebel CRM On Demand and appear in the Calendar. All updates and deletions you make in your PIM continue to be synchronized between the two applications.

Each instance of a *recurring task* appears as a separate task in Siebel CRM On Demand. If you change an individual task record in Siebel CRM On Demand, that change is preserved; it is not overwritten during subsequent synchronizations.

**Reminders.** The reminder in your PIM that notifies you of upcoming appointments, such as a 15-minute reminder, or of tasks that are past their due date does not exist in Siebel CRM On Demand. Also, you must manually set the reminder in your PIM for any new appointments or tasks that are created in Siebel CRM On Demand and then copied over to your PIM during synchronization.

**Linked records.** If an appointment or task is linked to a contact, account, opportunity, lead, campaign, or service request in Siebel CRM On Demand, this record type is named in the first line of the Body field in Outlook. For example:

Related To: Contact: Maria Sanchez; Account: XYZ Corporation; Service Request: Provide upgrade.

Since the Related To information lists the records that are linked to the appointment or task, no changes you make to that information affect Siebel CRM On Demand. Unlike other information that appears in the Body field, the Related To line is not copied over to the Description field in Siebel CRM On Demand.

**Maximum number of records.** To reduce synchronization time, the number of recurring appointments and tasks created in Siebel CRM On Demand has a maximum limit, as shown in this table:

Recurring Frequency	Record Limit
Daily	31
Weekly	53
Monthly	13
Quarterly	5
Yearly	2
Other	50

For example: If you have a daily appointment in Outlook and you synchronize on March 1, Siebel CRM On Demand creates 31 daily appointments (March 1–March 31). If you run another sync a week later (on March 8), once again 31 daily appointments are created; but this time they extend from March 8–April 7.

## About the Sync Engine and Field Mapping

When the initial synchronization takes place, the sync engine looks at certain key fields to match records in your PIM and Siebel CRM On Demand. For example, if you have *John Smith* as a contact in Outlook and *John Smith* as a contact in Siebel CRM On Demand, the sync engine sees them as matching records and treats them as one record.

**NOTE:** The application ignores differences in punctuation and capitalization when determining matches. For example, all these account names (linked to contacts) would be considered matches, and therefore the same record: IBM, I.B.M., ibm.

The following table shows which fields are the key fields (in the Outlook column), which fields are required (in the Siebel CRM On Demand column), and how the fields are mapped between Siebel CRM On Demand and Outlook.

If the required fields are not filled, the record is not created. When this occurs, it is stated in the log file.

Field mappings are fixed and cannot be changed. Those fields that are not listed here are not mapped; the information is not retrieved from any of the applications.

Siebel CRM On Demand Field	Microsoft Outlook Field	Lotus Notes 6.0/6.5/7.0 Field	Palm Desktop Field
<b>Contacts</b>			
Assistant Name	Assistant Name	Assistant	Assistant
Assistant Phone #	Assistant Telephone Number	Assistant Phone #	
Contact City	Business Address City	Business City	City
Contact Country	Business Address Country	Business Country	Country
Work Phone #	Business Telephone Number	Office phone	Work
Contact State/Province	Business Address State	Business State	State
Contact Address	Business Address Street	Business Street	Address
Contact Zip/Postal Code	Business Address Zip	Business Zip	Zip Code
Account	Company Name (Key field)	Company	Company
Department	Department	Department	Department
Email	Email1 Address	eMail address	E-mail
Work Fax #	Business Fax Number	Office fax	Fax



Siebel CRM On Demand Field	Microsoft Outlook Field	Lotus Notes 6.0/6.5/7.0 Field	Palm Desktop Field
First Name (Required)	First name	First name	First name
Job Title	Job title	Job title	Title
Last Name (Required)	Last name (Key field)	Last name	Last name
Middle Name	Middle name (Key field)	Middle name	Middle name
Cellular Phone #	Mobile Telephone Number	Cell phone	Mobile
Description	Body	Comment	Note
Private	Private	Private	Private
Mr./Ms.	Title	Title	
<b>Appointments</b>			
Description	Body	Description	Note
End Time (Date Part) (Required)	End Date	End Date	End Date
End Time (Time Part) (Required)	End Time	End Time	End Time
Location	Location	Location	
Private	Private	Mark Private	Mark Private
Start Time (Date Part) (Required)	Start Date (Key field)	Begin Date	Date
Start Time (Time Part) (Required)	Start Time	Begin Time	Start Time
Subject (Required)	Subject (Key field)	Subject	Description
<b>Tasks (ToDo's)</b>			
Complete Flag	Completed Flag	Completed?	Complete
Description	Body	Description	Note
Due Date (Required)	Due Date	Due Date	Due Date
Priority (Required)	Priority	Priority	Priority
Private	Private Flag	Mark Private	Private
Status	Status		

Siebel CRM On Demand Field	Microsoft Outlook Field	Lotus Notes 6.0/6.5/7.0 Field	Palm Desktop Field
Subject (Required)	Subject (Key field)	Subject	Description

## Running the Initial Synchronization with Your PIM

To run the initial synchronization between your PIM and Siebel CRM On Demand, you need to:

- 1 Install the synchronization software (Siebel PIM Sync On Demand).
- 2 Configure the settings for synchronization.  
**NOTE:** You can create filters during this step.
- 3 Do the initial synchronization of data.

When synchronizing data, you can use filters to synchronize a subset of record, based on criteria you specify. For example, if you are planning to visit a particular region of the country and want to synchronize the contacts for the states you are visiting—or if you want to carry the contact information for only your high-profile customers—you would create filters to limit your records.

### Before you begin:

- Connect to the Internet.
- Make sure your computer meets the system requirements shown in the System Requirements section in Siebel CRM On Demand.
- Each user should synchronize from his or her computer. Siebel PIM Sync On Demand does not support multiple users synchronizing from the same machine or the same user synchronizing from multiple computers.
- Select the filter within PIM Sync to exclude private data before your first synchronization; otherwise, the records will be marked private within On Demand and deleted from your PIM client.
- If you are going to share a contact through different users within the application and then synchronize the contact's details with a mobile, make sure the Enable Sync of Team Contacts check box (located under Additional Information under Personal Preferences) is selected.
- If you are going to create a filter to exclude your private records from being added to Siebel CRM On Demand, make sure the Private check box (bottom right corner of record details) is selected for your personal tasks, appointments, and contacts in Microsoft Outlook.
- Since the data is mapped to specific fields in each application, make sure your data is set up properly in the appropriate fields. For example, if you include the Country in the State field in Outlook, it will not match the drop-down options in Siebel CRM On Demand and,

therefore, won't be added to the record in Siebel CRM On Demand. In subsequent syncs, this type of mismatch is treated as a conflict.

- Special characters, such as the trademark or euro symbols, might not appear correctly between Outlook and Siebel CRM On Demand.
- Make sure the time zone set in Siebel CRM On Demand corresponds to the time zone set in your PIM application. For instructions on setting your time zone in Siebel CRM On Demand, see [Updating Your Personal Details](#) (on page 306).

**CAUTION:** If you change your time zone (for example, if you set your computer clock to match another region's while you're traveling), be sure to close Siebel PIM Sync On Demand and then re-open it. This allows the application to synchronize the times set for your tasks and appointments accurately.

The following section describes how to install the synchronization software.

#### *To install the synchronization software*

- 1 Sign in to Siebel CRM On Demand.
- 2 Click the My Setup link at the top of any page.
- 3 On the Personal Homepage, click the Data & Integration Tools link.
- 4 On the Data & Integration Tools page, click the Siebel PIM Sync On Demand link.
- 5 On the Siebel PIM Sync On Demand page, read the information and click the Download Siebel PIM Sync On Demand link.
- 6 On the second Siebel PIM Sync On Demand page, read the additional information and click the Download Siebel PIM Sync On Demand link.
- 7 In the window, you can do one of the following:
  - Click Save to copy the file to your hard drive, which allows you to complete the installation later while you are offline. (Recommended).
  - Click Open to begin the installation. You need to stay connected to the Internet to continue with the installation.
- 8 Unzip the files.

The default location is C:\OnDemandCRM\sync.
- 9 Open the folder where you unzipped the file, and click Setup.exe to start the installation wizard.
- 10 Follow the instructions to complete the installation.

The following procedure describes how to configure the synchronization.

### *To configure the synchronization*

- 1 Install the software.
- 2 From the Start menu on your computer, select Siebel CRM On Demand > Siebel PIM Sync On Demand > Siebel PIM Sync On Demand.
- 3 In the Siebel PIM Sync On Demand window, click Specify Synchronization Settings.
- 4 In the Siebel PIM Sync On Demand window, type the email address and password you use to sign in to Siebel CRM On Demand, and click Configure Applications.
- 5 In the Siebel PIM Sync On Demand Configuration window, select Appointments and click Choose.
- 6 In the Choose Application window, select Microsoft Outlook, select Synchronize, and click OK.
- 7 In the Siebel PIM Sync On Demand Configuration window, click the Configure drop-down list and select Advanced Settings.
- 8 For Date Range (available for Appointments and ToDo's), select the time span to determine which records are synchronized. The default is to synchronize only future appointments and event items.
- 9 Click the Conflict Resolution tab, and select how you want conflicts to be resolved.  

A data conflict exists when two records contain the same values in key fields. For information on the options, see [About Conflict Resolution with PIMs](#) (on page 344).
- 10 Click Filters and either keep the <None Selected> default or create a new filter based on any default fields in Outlook.  

**CAUTION:** Selecting the Exclude Private Data filter can cause your private records to be deleted during subsequent synchronizations. To exclude your private records, create a new filter based on the Private field in Outlook.
- 11 Repeat Step 5 through Step 10 for the other record types.
- 12 In the Siebel PIM Sync On Demand window, click Save.

The following procedure describes how to create a filter.

***To create a filter***

- 1** Go to the Siebel PIM Sync On Demand Configuration window:
  - a** From the Start menu on your computer, select Siebel CRM On Demand > Siebel PIM Sync On Demand > Siebel PIM Sync On Demand.
  - b** In the Siebel PIM Sync On Demand window, click Specify Synchronization Settings.
  - c** Click the Configure Applications button.
- 2** Select the record type you want to filter on.
- 3** Click the Configure drop-down list and select Advanced Settings.
- 4** Click the Filters tab.
- 5** Click New.
- 6** Type in a name for the filter (for example: Exclude Private Contacts).
- 7** Set up the conditions for the filter:
  - a** Click the Field button and select a Category from the list (for example: Private).
  - b** Select an Operator (for example: is false).
  - c** Type in the first Value to match, if necessary.

For example, if you set up another filter, based on "Company Name," with the condition "contains," then enter the first company name to match: IBM.
  - d** Click Add to List.
  - e** (Optional) Repeat these steps to add more values or more conditions for this filter.
- 8** Set up the rules for the filter:
  - a** Click the Rules tab.
  - b** Select one option: All conditions must be met or One or more conditions must be met.
  - c** Click OK.

The new filter you have set up is selected in the list.
- 9** In the Advanced Settings window, click OK.

- 10 To use this filter and run the synchronization process now, click the Synchronize Your Data button.

Only the records that meet your defined criteria are synchronized.

The following procedure describes how to do the initial synchronization.

### *To do the initial synchronization*

- 1 From the Start menu on your computer, select Siebel CRM On Demand > Siebel PIM Sync On Demand > Siebel PIM Sync On Demand.
- 2 In the Siebel PIM Sync On Demand window, click Synchronize Your Data.  
For each record type, a confirmation box appears, listing the changes made for records of that type. You can review the changes, cancel the sync, or accept the changes to complete the synchronization process.

## Changing the Synchronization Settings

You can change the settings before you synchronize your data. For example, if you find that the synchronization is taking a long time, you might want to reduce the set of data you synchronize during one session.

**Before you begin.** Connect to the Internet.

### *To change the synchronization settings*

- 1 From the Start menu on your computer, select Siebel CRM On Demand > Siebel PIM Sync On Demand > Siebel PIM Sync On Demand.
- 2 In the Siebel PIM Sync On Demand window, click Specify Synchronization Settings.
- 3 To change your email address and password, type the new information in the Siebel PIM Sync On Demand window.
- 4 In the Siebel PIM Sync On Demand window, click Configure Applications.
- 5 In the Siebel PIM Sync On Demand Configuration window, select the record type whose settings you want to change, and specify new options.  
For more information, see [Running the Initial Synchronization with Your PIM](#) (on page 338).
- 6 In the Siebel PIM Sync On Demand window, click Save.

## Running Additional Synchronization Sessions

You want to synchronize your records whenever you update, add, or delete contacts, tasks, or appointments. To do so, you need to be connected to the Internet, but you do not need to be signed in to Siebel CRM On Demand.

If you do not synchronize for seven days, the application adds a task to remind you to do so. The reminder appears once a week until 21 days have passed. After that, no more reminders are triggered.

**CAUTION:** If you change your time zone (for example, if you set your computer clock to match another region's while you're traveling), be sure to close Siebel PIM Sync On Demand and then re-open it. This allows the application to synchronize the times set for your tasks and appointments accurately.

**Before you begin.** Connect to the Internet.

### *To run additional synchronization sessions*

- 1 From the Start menu on your computer, select Siebel CRM On Demand > Siebel PIM Sync On Demand > Siebel PIM Sync On Demand.

- 2 In the Siebel PIM Sync On Demand window, click Synchronize Your Data.

For each record type, a confirmation box appears, listing the changes made for records of that type. You can review the changes, cancel the sync, or accept the changes to complete the synchronization process.

## Reviewing the Sync Results

During the sync process, you are prompted to confirm the results. After the sync session is completed, you can also review the latest sync results by opening log files:

- One log file records errors, warnings, and high-level changes to Siebel CRM On Demand. This file is on the server and accessible through Siebel CRM On Demand.
- The other log file tracks the changes made to Outlook on a very detailed level.

The log files are overwritten each time a sync session is run, so they contain only data about the most current sync.

### *To review the sync results for Siebel CRM On Demand*

- 1 Sign in to Siebel CRM On Demand.
- 2 Click the My Setup link at the top of any page.
- 3 On the Personal Homepage, click the Data & Integration Tools link.

- 4 On the Data & Integration Tools page, click the Siebel PIM Sync On Demand link.
- 5 On the Siebel PIM Sync On Demand page, click the View Sync Log link.
- 6 Save the file or open it directly.  
The default filename is pim\_sync\_log.txt.

### ***To review the sync results for Microsoft Outlook***

- On your computer, open the following files:
  - PTrace.log: C:\Documents and Settings\<Windows user>\Application Data\Siebel PIM Sync OnDemand
  - Is4web.log: C:\Documents and Settings\<Windows user>\Application Data\Siebel PIM Sync OnDemand\<email login On Demand>

## About Conflict Resolution with PIMs

Conflicts occur on the *field level* when the same field in the same record has been updated in Siebel CRM On Demand and your PIM. For example, if an email address has been updated in Siebel CRM On Demand while you updated the same email address in your PIM, this is a conflict that is recognized during the synchronization.

These are the options for resolving conflicts:

- Add all conflicting items  
  
Add a new record to each system containing mapped values from the record in the other system. The original conflicting records remain intact.  
  
Normally, when Add all conflicting items is selected, a data conflict causes a conflicting record to be added to each system. However, if a text field is changed in both systems, and the text in one field is a truncated version of the text in the other, the shorter text is overwritten by the longer text.
- Ignore all conflicting items  
  
Let the conflict stand. No changes are made to either system.
- Notify me when conflicts occur (Default)  
  
Receive notification when conflicts occur. The system displays a window with details about each conflict that it detects, and gives you options for resolving the conflict.
- Siebel CRM On Demand Wins  
  
Use this option when you are confident that Siebel CRM On Demand contains the most current data.
- MS Outlook Wins  
  
Use this option when you are confident that your PIM contains the most current data.



If you accept the default setting for conflict resolution (notify me), you are prompted on how to handle each record conflict. When you resolve the conflict, the sync continues.

**NOTE:** Overlapping appointments are not treated as data conflicts during synchronizations.

## Adding Emails from Microsoft Outlook and Lotus Notes

On Demand Outlook® Email Integration (OEI) and On Demand Notes® Email Integration (NEI) are modules that allow you to add emails from Microsoft Outlook and from Lotus Notes to Siebel CRM On Demand. Those emails become a history of all your account interactions, available to the entire sales team.

When you add emails to the application (either already received or outgoing emails), you can:

- Add the email as a task record (a completed activity) linked to Account, Contact, Lead, Opportunity, or Service records in Siebel CRM On Demand
- Add the email recipients as Contacts, Leads, Opportunities, or Service Requests to Siebel CRM On Demand
- Create followup tasks or appointments from the emails in Siebel CRM On Demand
- Update Siebel CRM On Demand records directly from Outlook or Notes, including new email addresses
- Search Siebel CRM On Demand to find addressee information (OEI only)

To use OEI or NEI, install it on your laptop or desktop computer.

**NOTE:** To use OEI or NEI, you must have the Outlook/Notes Email Integration Access privilege.

### OEI Installation

The OEI installation involves downloading and running a setup program which runs a simple InstallShield wizard. The wizard creates an Outlook plug-in that adds the following icons or labels to the Outlook toolbar:

- Add to Siebel On Demand. This appears in the Inbox toolbar.
- Send & Add to Siebel On Demand. This appears in the Message window toolbar.
- Siebel On Demand Find. This appears in the Message window toolbar.

Before you begin the OEI installation:

- Make sure your computer meets the system requirements shown in the System Requirements section in Siebel CRM On Demand.
- Make sure Microsoft Word is not selected as your email editor. To verify that, click Tools in the Outlook menu bar and select Options. Under the Mail Format tab, clear the check box for this field: Use Microsoft Word to edit email messages.

### ***To install OEI***

- 1** Exit Microsoft Outlook and close all its open windows.
- 2** Sign in to Siebel CRM On Demand.
- 3** Click the My Setup link at the top of any page.
- 4** On the Personal Homepage, click the Data & Integration Tools link.
- 5** On the Data & Integration Tools page, click the Siebel Outlook Email Integration On Demand link.
- 6** On the Siebel Outlook Email Integration On Demand page, read the information and then click the Download Siebel Outlook Email Integration On Demand link.
- 7** Repeat Step 6.
- 8** Click Save (recommended) or Open to unzip the OEI files and save them to your hard drive.
- 9** On your hard drive, open the OEI Setup.exe file and follow the instructions to complete the installation.

## **NEI Installation**

Integrating Lotus Notes® Email with CRM On Demand is a two-step process:

- Modifying the Lotus Notes Template
- Installing the Lotus Notes Email Integration Plug-in on the user's computer

### **Modifying the Lotus Notes Template**

The Lotus Notes template is modified at the corporate level by your Lotus Notes administrator to expose the necessary code and UI elements that provide the interface with the Lotus Notes Email Integration plug-in.

### ***To download the Lotus Notes Email Integration files***

- 1** Click the Training and Support link in the upper-right corner of any page to open the Training and Support Center page.
- 2** On the Training and Support Center page, click the Search Knowledge link, and then sign in to *OracleMetaLink*.

If you already have an Oracle.com account, you can sign in to *OracleMetaLink* without registering. If you do not have an Oracle.com account, you must register as a new user.

- 3 In the Oracle*MetaLink* Knowledge page, click the Downloads link, and then click the link to download the Lotus Notes Email Integration files for the appropriate CRM On Demand release.

### Installing the Lotus Notes Email Integration Plug-In

The NEI installation involves downloading and running a setup program that runs a simple InstallShield wizard. The wizard installs and registers a Lotus Notes plug-in that adds the following buttons to the folder and memo views in Lotus Notes:

- Add to Siebel. This button appears in the Inbox and Sent Items folder views.
- Send & Add to Siebel. This button appears in the New Memo and Reply Memo views.

Before you begin the NEI installation:

- Check with your On Demand administrator to see if NEI has been enabled at your company. Your company's Lotus Notes administrator must make modifications to your company's corporate Lotus Notes template to enable NEI before NEI will work.

**CAUTION:** Do not attempt to install NEI until you are sure that it has been enabled at your company. Doing so will require NEI to be uninstalled and reinstalled before it will work.

- To download the NEI Installation package, click the Training and Support link in the upper-right corner of any page to open the Training and Support Center page. On that page, click the Search Knowledge link, and then sign in to Oracle*MetaLink*. In the Oracle*MetaLink* Knowledge page, click the Downloads link, and then click the link to download the installation package.
- Make sure you have a supported version of Lotus Notes installed on your computer. Lotus Notes 6.5 or higher supports NEI.

### To install NEI

- 1 Exit from Lotus Notes, and close all of its windows.
- 2 Obtain the NEI Installer from your On Demand administrator, and save it to your desktop.
- 3 From your desktop, run Siebel\_LNEI\_OnDemand.exe, and then follow the instructions to complete the installation.

### Uninstalling OEI or NEI

You can uninstall OEI or NEI at any time using the Microsoft Windows Add/Remove Programs utility.

## Adding Email Information to Siebel CRM On Demand

When adding email to Siebel CRM On Demand, the combined file size for the email and attachment cannot exceed 5 megabytes (MB).

**NOTE:** When opening or creating emails in Outlook 2007, CRM On Demand buttons appear on the ribbon in the CRM On Demand Group on the Message tab.

### *To add email information*

- 1 Highlight or open the email you want to add to Siebel CRM On Demand.
- 2 Click the Add to Siebel On Demand icon in the toolbar.
- 3 In the Sign In window, enter the email address and password you normally use to access Siebel CRM On Demand.

**NOTE:** You only need to sign in one time for each Outlook or Notes session; you do not have to log in again until you close Outlook or Notes. Data that is sent to and from On Demand from OEI or NEI is always encrypted for security.

- 4 To automatically link emails during this session with the contact names in the To, Cc, and From fields, select Yes for Automatic Association.

The application searches the emails in Siebel CRM On Demand and automatically adds this email as a completed task. If no match is found, the window appears for you to manually search and link the email to records.

- 5 Click the Sign In button.

The application searches records in Siebel CRM On Demand and displays the results in the Create a Task window, as described in the following table.

This area	Contains these records
Selected Records	<p>Initially, this area shows the contact records whose email addresses in Siebel CRM On Demand exactly match the ones in the To, Cc, and From fields in the emails.</p> <p>You can move records from other areas in this window to the Selected Records. When you click Save in this window, the application saves the email to all the records in this area and to account records linked to them.</p> <p><b>NOTE:</b> A contact must have a linked account record for this email to be saved to it.</p>
Email Recipients Not Found	<p>This area shows names appearing in the To or Cc fields in the email that cannot be mapped to existing contacts in Siebel CRM On Demand.</p>

This area	Contains these records
Related Records	This area shows the records in Siebel CRM On Demand that are linked to the contact records corresponding to the email recipients, for example, Opportunities.

**6** From the Create a Task window, you can do the following:

To do this	Follow these steps
Add follow-up tasks or appointments to Siebel CRM On Demand	<ol style="list-style-type: none"> <li>1 In the Options After Saving area, select the Create a New Task or Create a New Appointment check box.</li> <li>2 Click Save.</li> <li>3 In the New Task or New Appointment form, update the information and save the record.</li> </ol>
Add a new opportunity or service request linked to an email recipient	<ol style="list-style-type: none"> <li>1 In the Selected Records area, right click on the email recipient name.</li> <li>2 Select Add New Opportunity to On Demand or Add New Service Request to On Demand.</li> <li>3 Update the information in the New Opportunity or New Service Request form.</li> <li>4 Click Save.</li> </ol>
Add the email recipient as a contact or lead	<ol style="list-style-type: none"> <li>1 In the Email Recipients Not Found area, right click on the email recipient name.</li> <li>2 Select Add to On Demand (for a new contact record) or Add New Lead to On Demand (for a new lead record).</li> <li>3 Update the information in the New Contact or New Lead form.</li> <li>4 Click Save.</li> </ol> <p>The email recipient's name moves to the Selected Records area in the window.</p>

To do this	Follow these steps
Add this email as a completed task	<ol style="list-style-type: none"> <li>1 Make sure a record appears in the Selected Records area.</li> <li>2 Click Save.  The email is saved as a completed task linked to each record in the Selected Records area along with accounts linked to those records. The default values shown in the Activity Details are used unless you update them.</li> </ol>
Link this email to another record	<ol style="list-style-type: none"> <li>1 In the Create a Task window, double-click on any found records to move them to the Selected Records area.</li> <li>2 (Optional) Update the default settings in the Activity Details area.</li> <li>3 Click Save.  This email is saved as a task linked to the selected records with the values shown in the Activity Details area.</li> </ol>
Remove the record from the Selected Records area	<ul style="list-style-type: none"> <li>■ Double-click the record. It moves to the left side of the window so that it won't be linked to this email.</li> </ul>
Search Siebel CRM On Demand for additional contacts, accounts, opportunities, leads, or service requests	<ol style="list-style-type: none"> <li>1 In the Search drop-down list, select the record type.</li> <li>2 Enter the name for which you want to search.</li> <li>3 Click Submit.  Records matching the name appear in the Search Results area.</li> </ol>
Update a record	<ol style="list-style-type: none"> <li>1 Right click on the record.</li> <li>2 Select Edit.</li> <li>3 Update the information in the Edit form.</li> <li>4 Click Save.</li> </ol>

To do this	Follow these steps
Update an email address in On Demand from this email	<ol style="list-style-type: none"> <li>1 In the Search Results area, right click on the record.</li> <li>2 Select Associate email address.</li> <li>3 In the Associate Contact with Recipient window, select the updated email address from the drop-down list.</li> <li>4 Click Save. The new email address appears in the contact record.</li> </ol>
View record information, such as the record name, email address, and related record names	<ul style="list-style-type: none"> <li>■ Move your mouse over the record and keep it there until the tool tip appears, showing this information.</li> </ul>

***To send an email and add the email to Siebel CRM On Demand***

- 1 In Microsoft Outlook, click New in the toolbar. In Lotus Notes, click the New Memo or Reply button.
- 2 (Optional) Add email recipients from the On Demand Contacts records:
  - a In the Message window, enter a name in the Siebel On Demand Find field.
  - b Press Enter.  
A window displays contacts found in On Demand.
  - c Select one of these options: To, CC, or BCC.
  - d Click Select.
- 3 Enter additional information as you normally would for sending an email.
- 4 Click Send & Add to Siebel.

When you click Save in the window, the email is sent to the recipients you selected, and the email itself is saved according to the information in the Create a Task window.

## Using Siebel CRM On Demand Integration for Office

Siebel CRM On Demand Integration for Office is comprised of downloadable template files:

- Mail Merge for Word
- Reports and Analysis for Excel

These template files insert special toolbars into Microsoft Word and Microsoft Excel. Using these toolbars, you can manipulate Siebel CRM On Demand data in Word or Excel to create direct mail, mass email, or refreshable offline reports.

This section includes the following topics:

- [Using Mail Merge for Word](#) (on page 352). Describes the Mail Merge for Word toolbar, provides information about opening Siebel Mail Merge templates properly, and explains how to create a direct mailing or mass email in Word using data from Siebel CRM On Demand.
- [Using Reports and Analysis for Excel](#) (on page 356). Describes the Reports and Analysis for Excel toolbar, provides background information about creating reports using Reports and Analysis for Excel, and describes how to run existing reports and create new reports using Reports and Analysis for Excel.

If your company uses Segmentation Wizard, a downloadable application that works between Siebel CRM On Demand and Excel, you can build target segments that filter records according to the criteria from a number of record types. To download Segmentation Wizard, click the Training and Support link in the upper-right corner of any page to open the Training and Support Center page. On that page, click the Search Knowledge link, and then sign in to *OracleMetaLink*. (If you already have an Oracle.com account, you can sign in to *OracleMetaLink* without registering. If you do not have an Oracle.com account, you must register as a new user before you sign in.) In the MetaLink Knowledge page, click the Downloads link, and then click the link to download the application.

**NOTE:** To use Siebel CRM On Demand Integration for Office, your administrator must have enabled Web Services. For more information, contact Customer Care.

**NOTE:** Networks that leverage authenticated proxies are not supported.

## Using Mail Merge for Word

Using Mail Merge for Word, you can download your Siebel CRM On Demand data into Word to create a direct mailing or mass email. Before doing so, you need to set up your Siebel Mail Merge templates.

Click a topic to see step-by-step procedures to do the following:

- [Creating Siebel Mail Merge Templates](#) (on page 354)
- [Creating Direct Mailings or Mass Emails with Mail Merge for Word](#) (on page 355)



## Related Topics

About the Mail Merge for Word Toolbar 353

## About the Mail Merge for Word Toolbar

Mail Merge for Word contains a toolbar, which is used to create mail merges with Siebel CRM On Demand data.

**NOTE:** If you are using Office 2007, the On Demand Integration toolbar is available in the Add-Ins tab. When you click the Add-Ins tab, all the On Demand Integration options are displayed.

The following table describes the options available in the Mail Merge for Word toolbar.

Toolbar Option	Description
1. Get Siebel Data	Allows you to sign in to Siebel CRM On Demand and download data to Word. Options are: Contacts, Leads, Accounts, Opportunities, Service Requests, and Use Saved List. Choosing Use Saved List allows you to select an existing data source stored on your machine as a list.
2. Refine Recipients	Allows you to choose which recipients from the downloaded data you want to correspond with.
3. Refine Message	Contains the following options: <ul style="list-style-type: none"> <li>■ <b>AutoText.</b> Allows you to insert predetermined fields into the message. For example, you can insert a closing line into each message using the AutoText option.</li> <li>■ <b>Insert Siebel Field.</b> Allows you to insert fields from the Siebel CRM On Demand record into the message. For example, you may choose to insert Full_Name into the greeting of each message.</li> </ul>
4. Preview	Allows you to preview each message. You can use the arrows to scroll through each one.
5. Print or Send Message	Allows you to merge the data into the template and print, merge into a separate Word document, or merge into individually addressed email messages and send them out.
6. Log as Siebel Activity	Allows you to create an activity in Siebel CRM On Demand as a record of the correspondence. This single activity is associated with each of the message's recipients. The text of the template sent is automatically inserted into the description of this activity.

## Creating Siebel Mail Merge Templates

There is no installation required to use Mail Merge for Word because its toolbar is attached to each template file. The following procedure describes how to create a Siebel Mail Merge template using the Mail Merge for Word toolbar. Using the toolbar to create Siebel Mail Merge templates allows you to make sure that your Siebel CRM On Demand data will support the personalization you are embedding into the template.

### About Opening Siebel Mail Merge Templates

To make sure that Mail Merge for Word is attached to any templates that you create or modify, you must always open the original template files. Make sure you have opened the original template file by checking the title bar. The document title should have a .dot extension.

**NOTE:** Do not double-click the file to open it. This simply opens a new Word document based on the template file. If you save any changes while in this mode, you will be saving a normal Word document that does not have the Mail Merge for Word toolbar attached.

#### *To create or modify Siebel Mail Merge templates*

- 1 Save the Siebel Mail Merge Template .dot file to your computer.
- 2 Right-click the Siebel Mail Merge template that you have saved locally and select Open. The file opens in Word.
- 3 Create a typical correspondence using the Mail Merge for Word toolbar and Word functionality.

You can refine recipients, insert Siebel fields, preview, and so on. For specific details about how to create a correspondence using the toolbar, see [Creating Direct Mailings or Mass Emails with Mail Merge for Word](#) (on page 355).

- 4 Before saving the template, unlink the data source from the template as follows:
  - a Click the Main document setup button on the Microsoft Word Mail Merge toolbar.
  - b In the Main Document Type dialog box, select the Normal Word document radio button.

**NOTE:** If the Microsoft Word Mail Merge toolbar is not visible, access it by clicking View > Toolbars > Mail Merge in the Word menu bar. If you are using Office 2007, this option is available in Mailings tab > Start Mail Merge

**CAUTION:** If you save and publish a template before unlinking the data source, the file will attempt to connect to a data source on the local machine when it is used.

- 5 Do one of the following:
  - If you are saving a new template, select File > Save As.
  - If you are saving changes to an existing template, select File > Save.

## Creating Direct Mailings or Mass Emails with Mail Merge for Word

Using Mail Merge for Word, you can download Siebel CRM On Demand data and merge it into a Word document. The following procedure uses Contacts as an example, but you can also create mail merges using On Demand data from Leads, Accounts, Opportunities, and Service Requests or using a recipient list you have saved locally.

### *To create a direct mailing or mass email using Mail Merge for Word*

- 1 Open the Word template file you want to use for your direct mailing.
- 2 On the Mail Merge for Word toolbar, click Get Siebel Data > Contacts.
- 3 In the CRM On Demand - Sign-in dialog box, complete the appropriate fields and click Sign In to sign in to Siebel CRM On Demand.
- 4 In the Define List dialog box, do the following:
  - a In the Filters tab, define the criteria for the data you want to download into Word.  
For more information about creating filters, see [Working with Lists](#) (on page 56).
  - b In the Fields tab, select the specific fields of information you want to download. A maximum of 40 fields can be selected.  
  
The system will scan the current template and automatically select each of the fields that are needed. You can select additional fields to insert into the template to further personalize the communication.  
  
**NOTE:** You should also select additional fields of information that may be required to send the communication. For example, if you are going to be sending a mass email, you must include the email address in the recipient file.
  - c Click OK.
- 5 In the Save List? dialog box, do one of the following:
  - a To save the list locally for later use, click Yes. In the Save As dialog box, complete the appropriate fields, and then click Save.
  - b If you plan on using the list only once, click No and then click OK. Selecting this option automatically saves the recipient list as a temporary file which will be deleted after use.
- 6 In the Mail Merge Recipients dialog box, you can do the following:
  - Clear check boxes to remove recipients from this correspondence.
  - Select check boxes to include recipients in this correspondence.

When you have finished editing recipients, click OK.

**NOTE:** You can reopen the Mail Merge Recipients dialog box by clicking Refine Recipients in the Mail Merge for Word toolbar.

- 7 Click Refine Message to insert Siebel fields or auto-text into the Word document. For more information about the Refine Message button, see [Using Mail Merge for Word](#) (on page 352).
- 8 Click Preview and use the arrow buttons to scroll through each message to see how they will appear when printed or sent by email. For more information about the Preview button, see [About the Mail Merge for Word Toolbar](#) (on page 353).
- 9 Click Print or Send Message and then do one of the following:
  - a To send to another Word document, select Merge to Document.
  - b To print, select Merge to Printer.
  - c To distribute as a mass email, select Send as Email.
  - d To distribute as a mass fax, select Send as Fax.

**NOTE:** To distribute correspondence as a mass fax, you must first configure Microsoft Office. For more information, search for "fax" in your Microsoft Office help files.
- 10 (Optional) Click Log as Siebel Activity to create a single Siebel CRM On Demand activity that will be associated with every contact selected for the mail merge. The system will automatically populate the Description field of the activity with the text of the template. In the Tasks dialog box, complete the appropriate fields and then click Save.

## Using Reports and Analysis for Excel

Using Reports and Analysis for Excel, you can download Siebel CRM On Demand data into Excel and work with it to create reports. This section includes the following topics:

- [About the Reports and Analysis for Excel Toolbar](#) (on page 357)
- [About Creating Reports with Reports and Analysis for Excel](#) (on page 357)
- [Creating Reports Using Reports and Analysis for Excel](#) (on page 358)

## About the Reports and Analysis for Excel Toolbar

Reports and Analysis for Excel contains a toolbar that is used to create reports using data from Siebel CRM On Demand.

**NOTE:** If you are using Office 2007, the On Demand toolbar is available in the Add-Ins tab. Click the Add-Ins tab to display all the On Demand Integration options.

The following table describes the Reports and Analysis for Excel toolbar.

Toolbar Option	Description
Configure Siebel Report	Allows you to sign in to Siebel CRM On Demand and download data to Excel.
Refresh Siebel Report	Updates data you are viewing in Excel with the most recent data available from Siebel CRM On Demand.

## About Creating Reports with Reports and Analysis for Excel

Using Reports and Analysis for Excel, you can download Siebel CRM On Demand data and manipulate it in Excel. When you click Configure Siebel Report on the Reports and Analysis for Excel toolbar, the Configure Reports dialog box appears. Using the Configure Reports dialog box, you can edit existing reports, create new reports, or remove existing reports. The following table describes the options available in the Configure Reports dialog box.

Button	Comments
Edit Report	Click to modify the filter settings and fields included in the selected report.
New Report	Click to create a custom report for the selected record type. You can set filter criteria against each of the standard and custom fields for that record type. For information about setting filter criteria in lists, see <a href="#">Working with Lists</a> (on page 56).
Remove Report	Click to remove a report from the Excel workbook.
Run Report	Click to run the currently selected report. After running, the report is added as a new worksheet to the workbook.
Exit	Click to exit the Configure Reports dialog box.

## Creating Reports Using Reports and Analysis for Excel

This section contains the following topics:

- Running Existing Reports
- Creating New Reports

### Running Existing Reports

The following procedure describes how to run an existing report using Reports and Analysis for Excel. It also includes an optional step which describes how to edit an existing report. After running the report, you can work with the data in your workbook. You can build pivot tables, pivot charts, charts and graphs, and calculate fields from information included in your report worksheets.

**NOTE:** When adding pivot tables, pivot charts, and graphs and charts you should create them in new worksheets, otherwise when you refresh your reports they could be overwritten.

#### *To run existing reports*

- 1 Open the Excel template file.
- 2 Click Configure Siebel Report on the Reports and Analysis for Excel toolbar.
- 3 In the CRM On Demand - Sign-in dialog box, complete the appropriate fields and click Sign In to sign in to Siebel CRM On Demand.
- 4 In the Configure Reports dialog box, from the Select Record Type drop-down list, select the record type you want for your report. Choices are: Account, Contact, Opportunity, Lead, Service Request, or Solution.

The available reports for the selected record type appear in the Available Reports list. You can edit an existing report, remove an existing report, or create new reports. For more information about the Configure Reports dialog box, see [About Creating Reports with Reports and Analysis for Excel](#) (on page 357). For more information about creating new reports, see Creating New Reports in this topic.

- 5 Select an existing report from the Available Reports list.
- 6 (Optional) Click Edit Report to modify the filter settings and fields included with the currently selected report.
  - a In the Define Report dialog box, in the Filters tab, define the criteria for the data you want to download.

For more information about creating filters, see [Working with Lists](#) (on page 56).

- b** In the Fields tab, select the specific fields of information to be downloaded and then click OK.

**NOTE:** You can select up to 100 Fields for inclusion in a report.

- 7** Click Run Report.

The requested data is inserted into the Excel workbook as a new worksheet labeled with the report name.

- 8** Click Exit in the Configure Reports dialog box to begin editing the data in Excel.

- 9** Click Refresh Siebel Report to update the data you are editing in Excel with the most recent data from your Siebel CRM On Demand application.

**NOTE:** When you click Refresh Siebel Report, each report worksheet in the workbook is overwritten with the most recent information from Siebel CRM On Demand.

## Creating New Reports

The following procedure describes how to create and run a new report using Reports and Analysis for Excel.

### *To create new reports*

- 1** Open the Excel template file you want to use to create your report.
- 2** On the Reports and Analysis for Excel toolbar, click Configure Siebel Report.
- 3** In the CRM On Demand - Sign-in dialog box, complete the appropriate fields and click Sign In to sign in to Siebel CRM On Demand.
- 4** In the Configure Reports dialog box, from the Select Record Type drop-down list, select the record type you want to use for your report. Choices are: Account, Contact, Lead, Opportunity, Service Request, or Solution.

The available reports for the selected record type appear in the Available Reports list.

- 5** Click New Report to create your own query.

**NOTE:** Creating a new report allows you to create a custom report for a selected record type. You can set filter criteria against each of the standard and custom fields for that record type.

- 6** In the Define Report dialog box, do the following:

- a** In the Filters tab, define the criteria for the data you want to download.

For more information about creating filters, see [Working with Lists](#) (on page 56).

- b** In the Fields tab, select the specific fields of information to be downloaded and then click OK.

**NOTE:** You can select up to 100 Fields for inclusion in a report.

- 7** In the Save Reports dialog box, enter a name for this report in the Report Name field for future use, and then click Save.

- 8** In the Configure Reports dialog box, select the report you just created and click Run Report.

The report you created appears as a worksheet in Excel labeled with the name you indicated.

- 9** After adding all the reports you need, click Exit to close the Configure Reports dialog box and begin to work with the data in your worksheet.

- 10** Click Refresh Siebel Report to update the data you are editing in Excel with the most recent data from Siebel CRM On Demand.

Clicking Refresh Siebel Report updates every report worksheet in the workbook.



# 20 Reports

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Siebel CRM On Demand displays reports on several pages in the application:

- **Reports Homepage.** The Reports Homepage shows the full catalog of available reports. It provides a good starting point for running, printing, and saving reports. If your role includes the Manage Custom Reports privilege, you can also create custom reports from this page and make them available to the employees at your company.
- **Dashboard.** The Dashboard Homepage shows a subset of all available reports grouped into business areas, each with a separate page for easy viewing and analysis of your data.
- **Homepages.** Several Homepages, such as the Account and Opportunity Homepages, show reports that are specific to that record type.
- **CRM On Demand widgets.** You can use CRM On Demand widgets to embed CRM On Demand reports in other applications. For more information about CRM On Demand widgets, see [About On Demand Widgets](#) (on page 320).

The reports provided by Siebel CRM On Demand initially cannot be edited or deleted, even by users with the Manage Custom Reports privilege. However, those reports can be opened, edited, and saved under different names.

**NOTE:** Changes made to your Default Language, Currency, Time Zone, and Country fields on the Personal Profile pages are not reflected in all reports and analytics until you sign out and in again. Also, depending on your company's default language, you may see certain items in reports in a language other than your personal default.

If your company has more than one active currency, your company administrator must set up exchange rates for each currency and wait for the nightly analytics refresh to run *before* the reports and dashboards will accurately reflect all currencies.

*Note for first-time users:* Some reports are updated nightly, so you might not see data in reports for the first 24-hour period after signing in. For example, the Sales Effectiveness Reports will not show data until after that initial period.

# About Reports

Reports can be divided into two types:

- **Prebuilt reports.** Standard reports that Siebel CRM On Demand provides with the application. They appear on the Reports Homepage, the Dashboard pages, and Homepages for various record types, such as Accounts and Opportunities.
- **Custom reports.** Reports that users can create whose role includes the Manage Custom Reports privilege. Custom reports that are designated as Public are accessible to other employees, your company (through the Shared Custom Analyses link appearing on their Reports Homepage). Custom reports that are designated as Private are accessible only to the user who created the report (through the My Analyses link on the Reports Homepage).

## About Visibility to Records in Reports

When users view a report, the report shows only data that they have access to.

If a user's role includes the Access All Data in Analytics privilege, the user can see all records for their company within Siebel CRM On Demand Answers, and the user can see all records in reports. This privilege is typically assigned to administrators and executives. It overrides any other Analytics visibility setting.

If a user's role does not include the Access All Data in Analytics privilege, the visibility to records in Siebel CRM On Demand Answers is based on the Analytics visibility settings selected in the Reporting Subject Areas and Historical Subject Areas fields in the User Security Information section of the User Detail page. The Analytics visibility setting is available at the company level and also for individual users. If the user setting is not defined, the company setting applies. There are three visibility options:

- **Manager Visibility** - Allows users to see their own data, plus data directly owned by their subordinates.
- **Team Visibility** - Allows users to see their own data, plus data shared with them by Account and Opportunity Team.
- **Full Visibility** - Available only for the Historical Subject Areas field, this option combines Manager and Team Visibility.

## About Books in Analytics

The Book feature provides further control over what users see in Analytics results.

Users can use the Look In selector to restrict the data to a single book hierarchy. The book structure only appears in the Look In selector when the user is in Full Visibility mode.

Once a user selects a book, all Analytics contents (All Reports, Dashboards, and Homepage embedded reports) are restricted to the hierarchy of the selected book.

## About User Delegation in Analytics

The User delegation Analytics feature allows users to choose the view of data owned by every other user who has added them to their Delegated User list. You can select the delegator from the Look In selector. Even though you are selecting the view of data owned by a different user, your own visibility settings determine your view of the other user's data.

## About Creating Custom Reports

You use the Siebel CRM On Demand Answers tool to create custom reports. A custom report can be private, accessible only to the person who created it, or shared, accessible to other users.

- The Manage Custom Reports privilege allows users to create custom reports and publish them to company-wide shared folders in Siebel CRM On Demand Answers.
- The Manage Personal Reports privilege allows users to create custom reports and save them in a personal folder, but not to publish them to company-wide shared folders that are accessible to other users.

**NOTE:** Managers with the appropriate privileges can add or edit fields and drop-down list options (picklist values) in Siebel CRM On Demand. If you cannot find the standard fields and values when setting up your reports, ask your managers for the new display names. For more information, see [Application Customization](#) (on page 549).

## About Refreshing Reports and Data Updating

In the main area of Siebel CRM On Demand Answers, reports are grouped under these categories:

- **Analytics.** (Previously referred to as In-Depth Analysis or Historical Analysis.) These reports generally have to do with historical or trend analyses, or contain more complex calculations than those found in real-time reports. These reports do not have a Refresh link. For these reports, the system displays the date and time of the last update at the bottom of the page.

If this is the first time you sign in, the historical analyses will not show data during the first 24-hour period.

- **Reporting.** (Previously referred to as Real-Time Analysis) These reports provide real-time analysis. For these reports, the system displays a Refresh link directly underneath them. Click the Refresh link to view the most current, live information. The system then bypasses the cached information and regenerates the information in the report.

### Related Topics

About Dashboards	499
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# Setting Up Report Folders

You can set up report folders and limit user visibility to those folders. After that, only users granted visibility to certain folders will see them on their Reports Homepage.

Setting up report folders consists of these general steps:

- 1 Create folders and subfolders (in Siebel CRM On Demand Answers).
- 2 Assign visibility to folders (from the Administrator pages of Siebel CRM On Demand). See [Setting Up User Visibility to Shared Report Folders](#) (on page 366).
- 3 Populate folders with reports (in Siebel CRM On Demand Answers).

**Note:** To perform this procedure, your user role must include the Manage Custom Reports privilege.

### *To create report folders*

- 1 Click the Reports tab.
- 2 In the Custom Reports and Analyses section of the Reports Homepage, click the Design Analyses link.

This opens Siebel CRM On Demand Answers.

- 3 In the top right corner, click the Manage Analyses link.
- 4 In the Manage Analyses window, select one of these options:
  - My Folders. This stores the new folder in your private folder directory.
  - Shared Folders. This stores the new folder in the company-wide shared folder.

- 5 Open the parent folder, if necessary.

This creates the new folder as a subfolder of the parent folder.

- 6 Click the Create New Folder link.
- 7 Enter the folder name and description.

**NOTE:** Restrict report folders names to 255 characters or less. Visibility cannot be configured for shared report folders with names greater than 255 characters.

- 8 Click Create Folder.

When a folder is created, it becomes visible on the Reports Homepage. All users with access to the Shared Custom Analyses folder will see newly created Company Wide Shared folders. If needed, visibility to the shared folder may be restricted by linking user roles to it. If no user roles are linked to the folder, visibility remains public.

If a new folder is created in My Folders, it becomes visible in the My Analyses folder available from the Reports tab of Siebel CRM On Demand Answers. This folder contains private reports only. Other users will not see them.

For more information, see [Setting Up User Visibility to Shared Report Folders](#) (on page 366).

#### *To rename a folder*

- 1 In the Manage Analyses window, select the folder.
- 2 Click the Rename link.
- 3 Enter the new name.
- 4 (Recommended) Select Preserve references to old name of this item.
- 5 Click the Update button.

#### *To delete a folder*

- 1 In the Manage Analyses window, select the folder.
- 2 Click the Delete link.

#### *To populate a report folder with reports*

- Do one of the following:
  - Create the report, and then Save it in the folder.
  - Copy or move an existing saved report from one folder to another:
    - a In the Manage Analyses window, select the folder.
    - b Click the Copy/Move link.

The saved report directory for that report opens.
    - c Select the folder.
    - d Click the Copy or Move button.

**NOTE:** Do not copy or move a report from the My Folder to a Shared Folder. Instead, use the Open Analysis button to locate and open the report. Then, save it to a Company Wide Shared Folder.

## Setting Up User Visibility to Shared Report Folders

By default, all user roles have visibility to each shared folder. You can override the default by manually linking specific roles to individual folders. However, if you manually link a user role to a folder, the system automatically revokes visibility for all other user roles (except the Administrator role) to that folder. You must continue to manually link each role that should have visibility.

If you link a role to a folder with subfolders, then the role is also linked to all its subfolders. To change this, navigate to the subfolder and make any needed changes.

The Administrator role has visibility to all folders at all times. Consequently, the Administrator role cannot be manually linked to or removed from a folder. Any custom role created by copying the Administrator role inherits this same visibility to all folders at all times, regardless of whether or not the role is manually linked to or unlinked from folders.

**Before you begin.** To perform this procedure, your role must include the Manage Content privilege.

### *To set up user visibility to a shared report folder*

- 1 In the upper right corner of any page in Siebel CRM On Demand (not On Demand Answers), click the Admin global link.
- 2 On the Admin Homepage, in the Content Management section, click the Content Management link.
- 3 On the Content Management page, in the Report Folders section, click the Shared Custom Analyses link.

The Folders List page displays all subfolders for the Shared Custom Analyses parent folder.

**NOTE:** All users have visibility to the Shared Custom Analyses root folder.

- 4 Then you can:
  - Click the Folder Name to set visibility to the top-level folder.
  - To restrict visibility to a subfolder, click the Subfolders link until you reach the appropriate folder. Then click its name in the Folder Name column.
- 5 On the Folder Details page, click Add Roles.
- 6 Click the Lookup icon next to each field to link user roles.
- 7 To remove a user role from having visibility to a report folder, click Remove.
- 8 Click Save.

- 9 If you set visibility for a subfolder, you can click the folder name next to Parent Folder to go back to the listing of its subfolders.

## Sharing Private Reports

Visibility to the user's My Analyses private reports folder is restricted to the Siebel CRM On Demand session user only. The My Analyses folder contains reports created by the user and then stored as private. Users who have the Manage Custom Reports privilege can share Private reports with others by saving them in the Company Wide Shared Folder.

To share a private report, go to Siebel CRM On Demand Answers, and use Open Analysis to open the private report. Save it to a Shared folder and configure shared visibility as needed.

## About Sharing and Hiding Prebuilt Reports

Prebuilt reports are automatically shared to all company users.

The Access Analytics Reports - View Prebuilt Analyses privilege controls whether or not shared prebuilt analyses are exposed to users for specific roles. If Access Analytics Reports - View Prebuilt Analyses is enabled for a user role, all shared prebuilt analyses appear on their Reports tab. If the privilege is not enabled for the user role, then all prebuilt analyses are hidden.

To hide specific shared prebuilt reports and display others, clear the Access Analytics Reports - View Prebuilt Analyses privilege. This hides all shared prebuilt reports. Then to share specific prebuilt reports, go to Siebel CRM On Demand Answers, open the report you wish to share, and save it in a shared folder within Company Wide Shared Folder. Configure the shared folder visibility as needed.

**NOTE:** The Access Analytics Reports - View Prebuilt Analyses privilege determines whether or not prebuilt reports display on the Reports Homepage. It has no impact on the other Homepages or prebuilt dashboards. Therefore, if the Access Analytics Reports - View Prebuilt Analyses privilege is selected, prebuilt reports appear on the Reports Homepage as well as on prebuilt dashboards and other Homepage pages. If not selected, prebuilt reports appear on the prebuilt dashboards and other Homepages, but not on the Reports Homepage.

## Steps for Reports

Click a topic to see step-by-step instructions to do the following:

- [Running Reports](#) (on page 370)
- [Reviewing Report Data](#) (on page 368)
- [Printing Reports](#) (on page 368)
- [Downloading Reports](#) (on page 371)

If your role includes the Manage Custom Reports privilege, you can perform these additional procedures:

- [Getting Started with Custom Reports](#) (on page 373)
- [Making Custom Reports Public](#) (on page 457)

### Related Topics

About Reports 362

## Reviewing Report Data

Report data is shown in lists, tables, charts, or graphs. For many reports, you can select different categories to re-organize the same data from a different perspective. For example, you can see your accounts first grouped by region, and then change the selection to see the same data grouped by industry.

For charts and graphs, you can also drill down on each segment to see the records comprising that segment.

To allow users to compare relative and absolute numbers, many chart reports also show a table of supporting data metrics.

### *To change the perspective of the report*

- From the drop-down list, select another category to re-organize the same data from a different perspective.

### *To view the records comprising a segment of the chart or graph*

- On the chart, click a segment of the pie chart or bar graph.  
A list appears of the underlying opportunities, accounts, or service requests contributing to that segment.

## Printing Reports

You can print a report from the Reports Homepage or, if your role includes the Manage Custom Reports privilege, from Siebel CRM On Demand Answers.

### *To print a report from the Reports Homepage*

- 1 Click the Reports tab.
- 2 On the Reports Homepage, select the report.



- 3** Scroll to the bottom of the report, and click the Printer Friendly link.  
A new window shows the report without the extraneous links or interface elements.
- 4** On the browser menu, select File > Print.
- 5** In the Print window, click the Preferences button.
- 6** Select Landscape.  
Using Landscape mode optimizes the appearance of the reports.
- 7** Follow the onscreen instructions to print the report.
- 8** Click the Close Window button in the upper right hand corner to return to the Reports page.

***To print a report from within Siebel CRM On Demand Answers***

- 1** Click the Reports tab.
- 2** In the Custom Reports and Analyses section, click the Design Analyses link.
- 3** On the Siebel CRM On Demand Answers page, in the Open Existing Analysis section, click Open Analysis.
- 4** In the Open Analysis dialog box, locate and select the analysis you want to print and then click OK.
- 5** On the title bar, click the Preview Analysis button.
- 6** Scroll to the bottom of the report and click the Printer Friendly link.  
A new window shows the report without the extraneous links or interface elements.
- 7** On the browser menu, select File > Print.
- 8** In the Print window, click the Preferences button.
- 9** Select Landscape.  
Using Landscape mode optimizes the appearance of the reports.
- 10** Follow the onscreen instructions to print the report.
- 11** Click the Close Window link to return to the Reports Homepage.

## Running Reports

Although you can view reports on different pages in your application, the Reports Homepage provides a single point of access to all prebuilt reports and public custom reports.

### To run a report

- 1 Click the Reports tab.

The Reports Homepage groups the reports under these categories:

Category	Description
Custom Reports and Analyses	All custom reports, which are reports created by users at your company. Reports released to some or all employees are Shared Custom Analyses, while private reports are My Analyses. Only users with roles that include the Manage Custom Reports privilege can create custom reports using the Design Analyses link.
Quick Lists	Reports used for standard list reporting rather than interactive or graphical analytics.
Pipeline Analysis	Reports to help you evaluate your company's sales and team effectiveness.
Sales Effectiveness	Reports to help you evaluate your company's historical and current pipeline trends and performance.
Customers	Reports to help you evaluate the quality and demographics of your accounts and contacts.
Service	Reports to evaluate the effectiveness of your service organization.
Communications	Reports to help you evaluate statistics regarding your Call Center On Demand use, based on each workgroup and project.  The Communications section appears if your user role has the privilege for viewing this dashboard.
Marketing Effectiveness	Reports to help you evaluate the effectiveness of your campaign and lead management activities.

- 2 On the Reports Homepage, click the link for the prebuilt report you want to run, or drill down into a folder to click on the link to a custom report you want to run.

The report information appears on the Reports page.

- 3 Depending on the specific report, you might be able to do the following on the Reports page:

- To show the data from a different perspective, select other options from the drop-down lists.

- To view exact totals for a segment in a chart or graph, place the pointer over the segment.
- To view the records belonging to a segment, click the segment. The list of records appears with its specific data.
- To filter on a reporting level, select an option from the Reporting Level drop-down list:

Reporting Level	Description
(All Choices)	Report run on data owned by any user that the session user has visibility to in Siebel CRM On Demand Answers.
0	Report run on data owned by only the session user.
1	Report run on data owned by users 1 level beneath the session user in the organizational hierarchy, and all levels above the selected level.
2	Report run on data owned by users 2 levels beneath the session user in the organizational hierarchy, and all levels above the selected level.

- To download the report, click the link at the bottom of the page and follow the instructions.
- To refresh the report with current, real-time data (available for most, but not all reports), click the Refresh button at the bottom of the page.
- To print the report, click the Printer Friendly link at the bottom of the page.

#### Related Topics

About Reports 362

Reviewing Report Data 368

## Downloading Reports

You can download a report from the Reports Homepage or, if your role includes the Manage Custom Reports privilege, from Siebel CRM On Demand Answers.

### *To download a report from the Reports Homepage*

- 1 Click the Reports tab.
- 2 On the Reports Homepage, select the report.

- 3 Scroll to the bottom of the report, click the Download link, and select one of the following options from the drop-down list:
  - Download to Microsoft Excel (for Excel 2002 or more recent)
  - Download to Excel 2000

**NOTE:** Downloading charts to Excel 2000 is not supported; only data can be downloaded.

  - Download Data (.csv)
  - Download Data (.txt)
  - Download Web Page (MHTML)
- 4 Follow the onscreen instructions to download the report.
- 5 Click the Close button in the upper right hand corner to return to the Reports Homepage.

### *To download a report from within Siebel CRM On Demand Answers*

- 1 Click the Reports tab.
- 2 On the Public Analyses title bar, click the Create New Analysis button.
- 3 From the Open Existing Analysis section, click Open Analysis.
- 4 In the Open Analysis dialog box, locate and select the analysis you want to download and then click OK.
- 5 In the title bar, click the Preview Analysis button.
- 6 Scroll to the bottom of the report, click the Download link, and select one of the following options from the drop-down list:
  - Download to Microsoft Excel (for Excel 2002 or more recent)
  - Download to Excel (2000)
  - Download Data (.csv)
  - Download Data (.txt)
  - Download Web Page (MHTML)
- 7 Follow the onscreen instructions to download the report.
- 8 Click the Close button in the upper right hand corner to return to the Siebel CRM On Demand Answers page.
- 9 Click the Close button on the Siebel CRM On Demand Answers page to return to the Reports Homepage.

## Importing Your Downloaded Report

Within Excel, choose File then Open to import your downloaded report. If the data appears in a single column, select that column and choose Data then Text to Columns. In some versions of Excel, you can also double-click the downloaded file icon in Windows Explorer to import your downloaded report. For more information about compatibility with your version of Excel, contact your internal IT support team.

# Getting Started with Custom Reports

Imagine that the head of sales for your company asked you to put together a new weekly sales report to help analyze why sales deals are taking so long to close. How would you start? This is exactly the kind of task that Siebel CRM On Demand Answers can help you to do.

### Before you begin:

- To perform the procedures described in this section, your role must include the Manage Custom Reports privilege.
- Make sure the data that you want to include is not already available in a prebuilt report.
- Review the information about custom reports. See [About Reports](#) (on page 362). If you have added new fields, you can use those custom fields on a report. If you have changed the display names for fields, the new display names are used for reports.

However, if you rename record types, such as Accounts, the new names are not reflected in the reports.

**NOTE:** If you selected the option to add new picklist values when importing data, those new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during that time period.

To create custom reports, you access Siebel CRM On Demand Answers and begin creating your custom report by doing one of the following:

- Selecting an existing report to base your new report on
- Creating the report from scratch

After that, the Siebel CRM On Demand Answers tool guides you through the process of setting up your custom report and performing an ad hoc analysis. This process consists of these general steps:

### 1 [Step 1: Defining Criteria](#) (on page 378)

Set up columns and filters. Add filters to determine which data to include (optional but recommended). Filters restrict the data that is displayed, reducing the size of the data set and avoiding performance issues.

### 2 [Step 2: Creating Layouts](#) (on page 403)

Add charts or tables (optional) to include graphical or alternative representations of the data.

### 3 [Step 3: Defining Prompts \(Optional\)](#) (on page 452)

Add prompts that allow users to specify filter values when they run the report.

### 4 [Step 4: Reviewing Reports](#) (on page 457)

View the report results before you save it.

### *To begin creating a custom report*

#### 1 Click the Reports tab at the top of your page.

#### 2 On the Reports Homepage, in the Custom Reports and Analyses section, click the Design Analyses Link.

Siebel CRM On Demand Answers appears in a separate page, independent of the other Siebel CRM On Demand pages. It contains these sections:

##### ■ Create New Analysis

Allows you to create new analyses by first selecting a subject area to target the scope of your analysis. You can create real-time or historical analyses. The main area categorizes the custom reports under the Create New Analysis Area, according to how often their data is refreshed:

- **Analytics.** These reports are historical and trend analyses based on data that is refreshed nightly. For more information, see [About Reports](#) (on page 362).
- **Reporting.** These reports are up-to-the-second data analyses and real-time reports. For a list of the reports, see [About Reports](#) (on page 362).

##### ■ Open Existing Analysis

Allows you to edit the criteria and change the layout of existing analyses.

##### ■ Manage Analyses

Allows you to rename or delete saved analyses.

#### 3 Do one of the following:

- To build a completely new report, click the relevant subject area in the Create New Analysis section.

On the Build and View Analysis page, the Action bar on the left displays the folders and columns that are available for your selection.

- To build a new report based on an existing one, click Open Analysis in the Open Existing Analysis section.

In the Open Analysis window, select an existing analysis. On the Build and View Analysis page, the Action bar on the left displays the folders and columns that are available for your selection.

**NOTE:** When you build a report based on an existing one, the original report remains intact, and the one you are creating becomes a new custom report.

*To save your custom report*

- 1 Above the title bar, click the Save button.
- 2 Select the folder where you want to save the report.  
**TIP:** Save the report as a private one first, in My Folders. After checking the setup, if you want to allow others to use it, you can save it in Shared Folders, and then delete it from My Folders. Reports saved in Shared Folders appear in the Shared Custom Analyses folder on the Reports Homepage.
- 3 Enter a name for your report.  
**TIP:** Use a consistent naming convention that all users will recognize. Avoid using extra blank spaces, or symbols such as apostrophes, when naming reports.
- 4 Enter a short description of the report. The information you enter for both the name and description appears on the employees' Reports Homepage exactly as you enter it.  
**TIP:** Use the description to let users know if the report contains historical or real-time data.
- 5 Click OK to save the report.  
Your custom report is saved and appears in the folder you specified. It can also be accessed later using the Open Analysis button.

*To delete reports you have created*

- 1 Click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click the Design Analyses link.
- 3 On the Siebel CRM On Demand Answers page, in the Manage Analyses section, click the Manage Analyses button.
- 4 In the Manage Analyses window, select the folder containing the report you want to delete.
- 5 In the report row, click the Delete link, and then confirm the delete by selecting Yes.
- 6 Click the Getting Started link at the top of the page to return to the Getting Started With Answers page.

### *To rename reports you have created*

- 1 Click the Reports tab.
- 2 On the Reports Homepage, in the Custom Reports and Analyses section, click the Design Analyses link.
- 3 On the Siebel CRM On Demand Answers page, in the Manage Analyses section, click the Manage Analyses button.
- 4 In the Manage Analyses window, select the folder containing the report you want to rename.
- 5 In the report row, click the Rename link.
- 6 Update the Name field.
- 7 If necessary, update the Description field.  
Remember that if your report is a public one, the text for both the Name and Description fields shows up on the employee's Reports Homepage exactly as you enter it.
- 8 Click Rename.
- 9 Click the Getting Started link at the top of the page to return to the Getting Started With Answers page.

## Changing Appearance of Reports

When setting up or updating reports, you can change the visual appearance of reports, known as cosmetic formatting. You can apply cosmetic formatting, copy and paste cosmetic formatting attributes, and save a formatted report to use as a style template.

Depending on the item you are formatting, the dialog box displays different options, such as font, cell, and border controls, background color, additional formatting options such as cell padding, and custom CSS style options for HTML.

You can change the appearance of:

- columns and sections, such as background color and borders
- columns in tables
- size of titles

You can copy the range of cosmetic formatting attributes that you apply to an item, such as a column in a table, and paste them to an item of the same type, such as another column in the table or a column in a different table. You can also restore the default appearance. To do this, use the icons at the top right of the dialog boxes.

Views that support copying and pasting include the table, pivot table, and chart views.



## About Saving Reports as Style Templates

After you have customized the cosmetic appearance of a report and saved it, you can use it as a template. This allows you to apply the formatting from the saved report to new or existing reports.

Views that support the use of a saved report as a template include the table, pivot table, and chart views.

### *To format the visual appearance of a report*

- 1 Open the cosmetic format dialog box by doing one of the following:
  - In Step 1, click the Column Properties button, and then click the Style tab in the Column Properties dialog box.
  - In Step 2, open the Edit Format dialog box by doing one of these:
    - For Title or Table, click the Format View button.
    - In the pivot table view, click the Pivot Table View Properties button and then the Set alternate format button.

**NOTE:** In the table view, you can also click the format column button and use the Value Format tab. In the pivot table view, you can also click the section properties button and use the Section Properties tab.

The cosmetic format dialog box appears.
- 2 In the Font area, make your selections for the font family, size, color, style (such as bold), and any effects that you want to apply (such as underlining).

**NOTE:** For some items, this option is not available.
- 3 In the Cell area, set up the alignment and background color.

**NOTE:** For horizontal alignment, the most common justification for text data is left. For numeric data, the most common justification is right.

Vertical alignment does not have any impact unless the column spans multiple rows of other columns.
- 4 In the Border area, make your selections for the border position, color, and style of the cell.

**TIP:** You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position drop-down list.
- 5 To format spacing within the cell, click Additional Formatting Options and specify values for the width and height of the cell contents, and the space above, below, left and right of the contents.

Values are specified in pixels.

- 6 To override the style and class elements specified in Siebel CRM On Demand Answers style sheets, make your selections in the Custom CSS Style Options area:

- a Click the settings that you want to use.
- b Provide the location of the class, style, or style sheet.

**NOTE:** The advanced style formatting options are for users who know how to work with cascading style sheets.

- 7 Click OK.

### *To copy and paste a formatting attribute*

- 1 Select the item whose formatting you want to copy, such as a row, column, or table cell.
- 2 Open the cosmetic formatting dialog box, and click the copy formatting button.
- 3 Select the item to which you want to paste the formatting, access the cosmetic formatting dialog box, and click the paste formatting button.

### *To restore the default appearance*

- Access the cosmetic formatting dialog box for the item, and then click the clear formatting button.

### *To use a saved report as a template*

- 1 Click the import view formatting button near the top of the workspace:



- 2 At the Choose Request dialog box, navigate to the saved report, and click OK.
- 3 Click either the Saved Results link or the Preview Analyses button.

## Step 1: Defining Criteria

The defining criteria step consists of several substeps. Click a topic to see step-by-step instructions to do the following:

- 1 [Adding Columns to Reports](#) (on page 379)
- 2 [Adding Filters to Columns](#) (on page 379) (optional but recommended)

- 3 [Editing Column Properties](#) (on page 388)
- 4 [Setting Up Column Formulas](#) (on page 400)
- 5 [Sorting and Reordering Columns](#) (on page 401)

#### Related Topics

About Using Addresses in Reports 402

## Adding Columns to Reports

You add columns until your report contains all the data you want it to.

**NOTE:** If you select Fiscal Week, data is calculated from Sunday through Saturday. The start day of Sunday cannot be changed to another day.

### *To add columns to your report*

- 1 From the Siebel CRM On Demand Answers Active Subject Area, expand the Column lists to display the columns you can include in the reports.
- 2 Click the columns that you want to include in the report.

**NOTE:** You can remove a column from the report by clicking the X icon within that column. You can change the order of columns by dragging them to the new location and dropping them.

## Adding Custom Fields to Reports

You can add custom fields to reports and analyses by selecting them as columns from the Action bar on the left side of the page.

For multi-language deployments using Siebel CRM On Demand Answers, you must translate custom fields into each language used for Siebel CRM On Demand Answers for those fields to appear as selectable for reports and analyses. For example, if a custom field is created in English, it must be translated into German so that a German language user can see and then use the field in a report or analysis.

## Adding Filters to Columns

As part of the criteria, you can set up filters for columns in your report. A filter limits the results that appear when a report is run. Siebel CRM On Demand Answers shows only those results that match the criteria.

A column filter consists of the following elements:

- A column to filter, such as Account Type.
- A value to use when applying the filter, such as 10 (a SQL expression or a variable can be used instead of a value when necessary).
- An operator that determines how the value is applied, such as Less Than.

For example, if the column contains the quantity sold, the operator is Less Than, and the value is 10, the results include only order quantities where less than 10 units were sold.

A column filter can also have the following characteristics:

- It can be combined with other column filters from the same subject area to further constrain the results of a report.
- Filters can be grouped to create complex filters.
- Its value can be constrained by the results of a previously saved report from the same subject area.

The filter is translated into a WHERE clause in the SQL SELECT statement. The WHERE clause is used to limit the rows returned to those that fit the specified constraints. Advanced users can enter the SQL for a filter directly.

**NOTE:** If you selected the option to add new picklist values when importing data, those new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during that time period.

## Creating Column Filters

You can create a filter for each column in your reports. If you do not want the column to display in results, you can hide it.

**CAUTION:** If you click your browser's Refresh button before you have finished creating a column filter, the browser will reload the page and discard your changes.

### *To create a column filter*

- 1 In Siebel CRM On Demand Answers, to create a filter for use with a specific report criteria, display or add the criteria, and then click the New Filter button for the column that you want to filter on.

- 2 In the Create/Edit Filter dialog box, select an operator from the Operator drop-down list.

The choices for operators and values appear in the left column. Depending on the type of column you select, additional options may appear in the right column, such as calendar buttons for specifying a date range, or a text-matching box for limiting long lists of values.

- 3** To specify a value, enter it in the Value box, or click the Search link to view the available values in the column, and select a value from the right column.

Multiple values can be added by clicking Add and selecting Value after entering data for the current value field.

Use the guidelines shown in the following table when choosing an operator and specifying values.

Operator	Usage Guidelines
is equal to or is in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column matches the value in the filter.
is not equal to or is not in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column does not match the value in the filter.
is less than	Valid for a column that contains numbers or dates. Specify a single value. Results will include only records where the data in the column is less than the value in the filter.
is greater than	Valid for a column that contains numbers or dates. Specify a single value. Results will include only records where the data in the column is greater than the value in the filter.
is less than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will include only records where the data in the column is less than or the same as the value in the filter.
is greater than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will include only records where the data in the column is greater than or the same as the value in the filter.
is between	Valid for a column that contains numbers or dates. Specify two values. Results will include records for both the specified values and the values in between them.
is null	<p>Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the absence of data in the column. Results will include only records where there is no data in the column.</p> <p>Sometimes it may be useful to know whether any data is present, and using the is null operator is a way to test for that condition. For example, suppose your business has a worldwide address book and you want to extract the United States addresses only. You could do this by checking for the presence or absence of data in the State field. This field should be unpopulated (null) for non-United States addresses and populated (not null) for United States addresses. You can obtain a list of United States addresses without checking the column for a specific value.</p>

Operator	Usage Guidelines
is not null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the presence of data in the column. Results will include only records where there is data in the column.
is in top	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only the first n records, where n is a whole number specified as the value in the filter.  This operator is for ranked results. For example, you could use this operator to obtain a list of the top 10 performers.
is in bottom	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only the last n records, where n is a whole number specified as the value in the filter.  This operator is for ranked results. For example, you could use this to obtain a list of the customers reporting the fewest numbers of problems.
contains all	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column contains all of the values in the filter.
contains any	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column contains at least one of the values in the filter.
does not contain	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column does not contain any of the values in the filter.
begins with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only records where the data in the column begins with the value in the filter.
ends with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only records where the data in the column ends with the value in the filter.
is LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percentage symbol (%) as a wild card character. You may specify up to two percent sign characters in the value. Results will include only records where the data in the column matches the pattern value in the filter.
is not LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percentage symbol (%) as a wild card character. You may specify up to two percent sign characters in the value. Results will include only records where the data in the column does not match the pattern value in the filter.

Operator	Usage Guidelines
is prompted	<p>Valid for a column that contains text, numbers, or dates. Setting a column to <i>is prompted</i> flags it to be filtered by a value passed to it from another report.</p> <p><b>NOTE:</b> Use this option when linking reports together through navigation (see <a href="#">Step 2: Creating Layouts</a> (on page 403)). One or more columns in the report you drill into must contain the <i>is prompted</i> filter for that report to display rows limited to the value selected and drilled into from the parent report.</p>

- 4 Use the paging controls to navigate the choices when there are many choices for the column:
  - Click on a specific page number to navigate to that page.
  - Click the double right-arrow paging button ( >> ) to advance to the last page or the double left-arrow paging button ( << ) to go back to the first page.
- 5 Use the calendar buttons to specify the date range for columns that contain dates.  
To specify a single date, specify the same date for the beginning and ending date.
- 6 Use the Match drop-down list to view the available values to use in a filter. If desired, specify criteria to constrain the values to be returned (this is not mandatory). Then click the All Choices link, and select a value from the list returned.  
  
For example, suppose you want to see results for the East region. If you enter an E into the text box and select "begins with" from the Match drop-down list, the list shows only the values that begin with an E.
- 7 To add an SQL expression or a session variable, do the following:
  - a Click the Add button and select the appropriate option.  
The label on the Value box changes to reflect your selection.
  - b Enter the SQL expression or session variable name into the box.  
  
SQL expressions can contain function calls that operate on column values. For more information, see [Using Functions in Analyses](#) (on page 459) and [Session Variables](#) (on page 497).
- 8 To remove a value, SQL expression, or session variable, click the X icon next to it.  
To remove all definitions, click the Clear Values button.
- 9 To have this filter constrained by the value of a column from the same subject area in another analysis, click the Advanced button and select the Filter based on results of another request option.  
  
The Filter on Saved Request dialog box appears.

- 10** To convert the filter to SQL, click the Advanced button and select the Convert this filter to SQL option.

The Advanced SQL Filter dialog box appears.

- 11** When you are finished, click OK.

The filter appears in the Filters area on the Define Criteria page or on the Saved Filters page.

### **Saving Column Filters**

You can save a filter as part of an analysis or for reuse in other analyses. If a filter is for a specific analysis and you save the analysis, the filter is saved as part of the analysis and will be applied every time the analysis runs. You can also save the filter explicitly so it can be used in other analyses.

Saved filters and folders containing filters for the subject area appear following the name of the subject area. If there are no saved filters for the subject area, this part of the page is blank.

#### ***To save a column filter as part of an analysis***

- 1** Select the Save button on the Define Criteria page.
- 2** At the Save Analysis dialog box, select the location in which to save the analysis and then click OK.

#### ***To save a column filter for use in other analyses***

- 1** In the Filters area on the Define Criteria page, click the Save Filter button for the filter you want to save.

The Save Filter dialog box appears.

- 2** Select a folder in which to save the filter:

- To save the filter for your personal use, click My Filters.

Filters saved in My Filters are available only to you.

- To save the filter for use by others, click Public Filters.

Filters saved in a public filters folder are available to other users that have permission to access the folder.

- 3** Enter a name for the filter.
- 4** (Optional) Enter a description for the filter.
- 5** Click OK.



*To display the properties for a saved filter*

- With the filter showing in the Filters area, click the Filter Options icon next to it, and then click the Edit Filter option.

## Applying Saved Column Filters to Analyses

You can apply a saved column filter to an analysis. You can apply either the contents of the filter or a reference to the filter.

When you apply the contents of a saved column filter, the actual contents of that filter are copied into the Filters area on the Define Criteria page. This allows you to manipulate the filter criteria without altering the saved filter. When you apply a reference to a saved filter, the saved filter is referenced only by its name, and you can view but not alter its contents.

*To apply a saved column filter to an analysis*

- 1 On the Define Criteria page in Siebel CRM On Demand Answers, display an analysis to which you want to add a saved column filter.
- 2 In the Filters section, click the Open Saved Filter button, navigate to the appropriate Filters folder, click the saved filter that you want to apply, and then click OK.

The Apply Saved Filter dialog box appears.

- 3 Specify your choices, if any, in the Filter Options area.
- 4 Click OK.

The filter appears in the Filters area on the Define Criteria page.

## Editing Column Filters

You can edit a column filter to change its properties.

*To edit a column filter*

- 1 In the Filters area on the Define Criteria page in Siebel CRM On Demand Answers, click the Filter Options icon for the filter you want to edit, and then select Edit Filter.

The Create/Edit Filter dialog box appears.

- 2 Make your changes, and then click OK.

### Editing the Formula for a Column Filter

You can edit the formula for a column filter. The edits that you make apply only to the filter's use of the column; a formula can contain calls to functions to perform more advanced calculations. See [Using Functions in Analyses](#) (on page 459).

#### *To edit the column formula for a filter*

- 1 In the Filters area on the Define Criteria page, click the Filter Options icon for the filter and select Edit Column Formula.
- 2 Click the Column Formula tab.
- 3 Type the formula into the Column Formula area.

### Removing Column Filters

You can remove a single filter or all filters from an analysis.

**NOTE:** If the analysis was saved previously with any filters applied, save the analysis again to remove the filters.

#### *To remove a column filter from an analysis*

- In the Filters area on the Define Criteria page in Siebel CRM On Demand Answers, click the X icon.

### Combining Column Filters with Other Column Filters

Combining column filters, also known as parenthetical filtering, allows you to create complex filters without requiring you to know SQL.

You can combine column filters with AND and OR operators. The AND operator means that the criteria specified in each filter must be met. This is the default method for combining column filters. The OR operator means that the criteria specified in at least one of the column filters must be met.

#### *To combine a column filter with other column filters*

- 1 At the Define Criteria page in Siebel CRM On Demand Answers, add at least two column filters to an analysis, or add at least two column filters to a saved filter.

The filters are listed in the Filters area with an AND operator between them.

- 2 To change an AND operator to an OR operator, click it.

- 3 As you add column filters, click AND and OR operators to group filters and construct the desired filter combinations.  
Combined filters elements are bounded by boxes.
- 4 To cut, copy, or ungroup bounded elements, click the Edit Filter Group button and select the appropriate option.

## Preventing a Filter from Being Replaced During Navigation and Prompting

You can protect the contents of a filter in a report from being affected during navigation and prompting. A protected filter is always applied to results.

### *To protect a filter from changing during navigation and prompting*

- In the Filters area on the Define Criteria page, click the Filter Options icon for the filter, and select Protect Filter.

## Using Saved Reports as Filters

Filters can be combined with other filters, as well as be based on the values returned by another report. Any saved report that returns a column of values can be used to filter the selected column in your report.

### *To create a filter based on the results of another saved report*

- 1 Click the New Filter button to display the Create/Edit Filter dialog box.
- 2 Click the Advanced button, and then select the Filter based on results of another request option.
- 3 Select the appropriate relationship between the results and the column to be filtered from the Relationship drop-down list.
- 4 Click Browse to navigate to the saved report.  
If the saved report contains a matching column name, it appears in the Use Values in Column drop-down list. If you want to use another column, select it instead.
- 5 Click OK.

The filter appears in the Filters area on the Define Criteria page. Once you have chosen this option, editing the filter will always show you the "Filter based on ..." information only.

### Editing the SQL for a Column Filter

You can edit the logical SQL WHERE clause to be used as a filter. While generally not necessary, this feature is available for users who need advanced filtering capability. For a comprehensive description of SQL syntax, see a third-party reference book on SQL, a reference manual on SQL from one of the database vendors, or an online reference site. For more general information about using SQL in Siebel CRM On Demand Answers, see [Using Functions in Analyses](#) (on page 459).

#### *To edit the SQL generated for a column filter*

- 1 While in the Create/Edit Filter dialog box, click the Advanced button, and then select the Convert this filter to SQL option.

- 2 Enter your modifications into the text box and then click OK.

The filter appears in the Filters area on the Define Criteria page. Once you have chosen this option, editing the filter will always display the SQL that you entered.

*Example: Identifying Customers with the Most Sales Volume*

The following example reports data on the ten customers with the most sales volume in 2003.

```
"Close Date". "Calendar Year" = 2003  
AND RANK("Opportunity Metrics". "Closed Revenue") <= 10
```

### Editing Column Properties

You can edit properties for a column to control the appearance and layout of a column and its contents. You can also specify formatting to apply only if the contents of the column meet certain conditions. By default, your selections for a column apply only to the current report.

### Editing the Appearance of Column Contents

The default appearance of column contents in results is based on cascading style sheets and XML message files. You can use the Style tab of the Column Properties dialog box to override several default settings, such as the font and font size to use. Your selections apply only to the contents of the column for the report with which you are working.

#### *To edit the appearance of column contents*

- 1 In Siebel CRM On Demand Answers, click the Column Properties button for a column to open the Column Properties dialog box, and then click the Style tab.

- 2 Make your choices for font, cell, border, image, and advanced style formatting options.

For more information, see “Formatting Column Content” below.

- 3 In the Data Format tab, you can control the way the data is displayed by selecting the Override Default Data Format check box.

This option allows you to override the default display characteristics. The selections that you see vary based on the data type. For example, if the column contains numeric data, you can select how you want the numbers treated, such as percentages, month names, or dates. You can select the number of decimal places to display, how to display negative numbers, the number of digits to show, and the thousands separator to use. If your column contains text, you can select how to treat the text, such as plain text, HTML, or a link. Based on your selection, the Custom Text Format text box displays the applicable HTML string used to display the data.

To use a custom format for text, select Custom Text Format from the Treat Text As drop-down list, and then enter the custom format. You can enter HTML calls that provide special formatting. You can also enter any valid HTML string, including JavaScript, VBScript, and so on.

For example, the following example HTML sets the column width and height in tables and pivot tables. In the example, the text `html` enclosed in brackets (`[html]`) means to use HTML, and the at sign character (`@`) represents the dynamic contents of the column.

```
[html]<span style="width:200px" style="height:50px">@</span>
```

If you do not know HTML, JavaScript, VBScript, and so on, you can consult a third-party reference.

To create a custom numeric format, you can use the number sign (`#`) to include significant digits, and the number zero (`0`) to include as many digits as specified, even if the number does not contain that detail. These are examples:

Specifying `##.#` shows 12.34 as 12.3

Specifying `##.000` shows 12.34 as 12.340

- 4 Click OK when you are done.

## Editing the Layout of Column Contents

Use the Column Format tab of the Column Properties dialog box to perform the following tasks:

- Specify whether the column should appear in results.  
Columns are usually visible in results by default. However, you may want to include a column in your report that you do not want displayed in results, such as a column used in creating a filter.
- Assign alternate table and column headings and apply custom formatting to them.
- Control the display of duplicate data such as repeating column values.

The data in one column of a table may be repeated in relation to rows of data in other columns in the table. For example, if one column lists customer names and another column lists the regions those customers are in, the region data could be repeated for each customer row. You can select to display duplicate data only once, or display it for

every row. Displaying repeating or duplicated data only once can make a table somewhat easier to read, and can make distinctions in that data more apparent.

- Specify the interaction that should occur when users work with the results, such as navigation to another report.

You can also use functions and conditional expressions to format results in a variety of ways.

Your selections apply only to the contents of the column for the report with which you are working.

### *To hide a column in results*

- 1 On the Define Criteria page in Siebel CRM On Demand Answers, click the Column Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.
- 2 Select the Hide this column check box, if it is not already selected.

### *To create custom table and column headings*

- 1 On the Define Criteria page in Siebel CRM On Demand Answers, click the Column Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.

- 2 In the Headings area, select the Custom Headings check box.

This allows you to change the heading text and the heading formatting.

- 3 To change the text of the table or column heading, enter a new heading into the appropriate text box.

The heading will be used in this report instead of the default heading.

**NOTE:** You can also specify navigation to another report in the Column Heading Interaction area.

- 4 To change the format of the table or column heading, click the Edit Format button next to the text box.

The Edit Format dialog box appears.

Make your choices for font, cell, border, and advanced style formatting options. For more information, see "Formatting Column Content" below.

### *To suppress duplicate data*

- 1 On the Define Criteria page in Siebel CRM On Demand Answers, click the Column Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.

- 2 In the Value Suppression area, select the appropriate option:
  - Select Suppress to display repeating data only once and suppress duplicate rows.
  - Select Repeat to display repeating data for every row.
  - Select Default to retain the default display characteristics.

#### *To specify what happens when users click the column*

- 1 On the Define Criteria page in Siebel CRM On Demand Answers, click the Column Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.
- 2 To specify what should happen when users click the column, select the appropriate option in the Column Heading Interaction area:
  - Default - Restores the default interaction.
  - Drill - Allows you to drill down, so that you can view more information.
  - Navigate to another Analysis - Allows navigation to another analysis. Click the Add Navigation Target button, browse to a target report or dashboard, click OK, and enter a caption for the target in the Caption text box. Repeat this step for each navigation target you want to add. Click the Remove button beside the Caption text box to remove that navigation target.
  - No Interaction - Disables drilling or navigation. Interactions are defined separately for a column heading and the data in a column.

#### *To specify what happens when users click a value*

- 1 On the Define Criteria page in Siebel CRM On Demand Answers, click the Column Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.
- 2 To specify what should happen when users click a value, select the appropriate option in the Value Interaction area:
  - Default - Restores the default interaction.
  - Drill - Allows you to drill down, so that you can view more information.
  - Navigate to another Analysis - Allows navigation to another analysis. Click the Add Navigation Target button, browse to a target report or dashboard, click OK, and enter a caption for the target in the Caption text box. Repeat this step for each navigation target you want to add. Click the Remove button beside the Caption text box to remove that navigation target.
  - No Interaction - Disables drilling or navigation. Interactions are defined separately for a column heading and the data in a column.

### Applying Conditional Formatting to the Column Contents

In tables and pivot tables, conditional formatting helps direct attention to a data element if it meets a certain condition. For example, you can show high revenue sales figures in a certain color, or display an image such as a trophy next to the name of each salesperson who exceeds revenue by a certain percent.

You do this by selecting one or more columns in the report to use, specifying the condition to meet, and then making selections for font, cell, border, and style sheet options to apply when the condition is met. The conditional formats can include colors, fonts, images, and so on, for the data and for the table cell that contains the data. The steps to specify a condition are very similar to those used to create filters.

You can add multiple conditions so that the data and the table cell are displayed in one of several formats, based upon the value of the data. For example, low revenue sales can be displayed in one color, and high revenue sales can be displayed in another color.

Several subtle conditional formatting differences exist between traditional tables and pivot tables. Conditional formats that format one column based on the value of another column are not reflected in a pivot table, but are reflected in a standard table. For example, setting the color of a region name based on the sales in that region has no effect in a pivot table. However, setting the color of the sales data based on the value of the sales data is reflected in a pivot table, as is setting the color of the region name based on the actual name; for example, displaying a value of Eastern Region in bold colored text.

**NOTE:** In pivot tables, conditions are evaluated against the values as calculated or aggregated by the pivot table. Conditional formatting is applied based on the underlying value, even if you select the Show As options to show the data as percents or indexes.

Your selections apply only to the contents of the column for the report with which you are working.

#### *To add conditional formatting to a column in a report*

- 1 On the Define Criteria page in Siebel CRM On Demand Answers, click the Column Properties button for a column to open the Column Properties dialog box, and then click the Conditional Format tab.

- 2 Click the Add Condition button and select the desired column in the report for use in constructing the condition.

The Create/Edit Filter dialog box opens. Select the operator and value for the condition.

**NOTE:** When you access the Create/Edit Filter dialog box from the Conditional Format tab, the dialog box shows only the options that apply to conditional formats. For example, the Operator drop-down list shows the subset of operators that are used in conditional formats.

- 3 Click OK in the Create/Edit Filter dialog box.

The Edit Format dialog box appears.



- 4 Make your choices for font, cell, border, image, and advanced style formatting options.

For more information, see “Formatting Column Content” below.

**NOTE:** If you specify an image as part of the conditional formatting, it appears conditionally in the results.

- 5 Click OK when you are done to return to the Column Properties dialog box.

The Column Properties dialog box shows the condition, and the conditional formatting to apply.

Columns are evaluated in the order that they are listed.

- To reorder a column, click the Move Up or Move Down buttons.
- To delete a column from the condition, click the Delete button.
- To edit a condition or a conditional format, click it.

- 6 You can specify another condition to include, or click OK if you are done.

The following example describes how conditional formatting can be applied to results.

Suppose a report includes ten ranking categories, with a value of 1 in the column indicating the worst ranking, and a value of 10 indicating the best ranking. You could apply conditional formatting to show the following:

- One image to indicate a low rank for columns that contain 1, 2, or 3.
- Another image to indicate an average rank for columns that contain 4, 5, 6, or 7.
- A third image to indicate a high rank for columns that contain 8, 9, or 10.

In the Graphics dialog box, select the Images Only image placement option. In the results display, the columns appear with only the images, and not the ranking numbers.

## Formatting Column Content

Use the Edit Format dialog box (and the options on the Style tab of the Column Properties dialog box) to select font, cell, border, and advanced style formatting options for column data that is shown inside a cell in a tabular format, such as a table or pivot table. You can also select settings for table and column headings.

If you are overriding the default formatting properties for a column, your selections are static. If you are specifying conditional formatting properties for a column, your selections apply only if the condition is met.

### *To use the Edit Format dialog box or the Style tab of the Column Properties dialog box*

- 1 In the Font area, make your selections for font family, size, color, style (such as bold), and any effects to apply (such as underlining).

- 2 In the Cell area, make your selections for alignment, background color, and an image to display inside the cell.

- The selections for horizontal and vertical alignment are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

**For horizontal alignment:**

Select left to left-justify the data. This is the most common justification for text data. Select Right to right-justify the data. This is the most common justification for numeric data. Select Center to center the data. To retain the default data alignment associated with this column, select Default.

**For vertical alignment:**

Select Top to align the data to the top of the table cell. Select Bottom to align the data to the bottom of the table cell. Select Center to align the data to the middle of the table cell. To retain the default vertical alignment associated with this column, select Default.

- When you click the Image button, the Graphics dialog opens.
  - Select the No Image option if you do not want to include an image.
  - To include a custom image, select the Custom Image option and specify the appropriate path in the text box. The image should be one that is accessible to all users who will view the results. Custom images can be used for both conditional and unconditional results.
  - To include an image distributed with Siebel CRM On Demand Answers, use the graphics selection window. The window shows images that are useful in conditional formatting, such as meters and trend arrows. The left pane shows the categories of images. When you click on an image category, the right pane shows the images in that category. Make your selection by selecting the radio button next to the image you want to use.
  - To specify the location of the image within the cell, make a selection from the Image Placement drop-down list:

Default - Displays any images in the default position, which is usually to the left of the column data or heading.

Images Left - Displays any images to the left of the column data or heading.

Images Right - Displays any images to the right of the column data or heading.

Images Only - Displays only the image, and not the column data or heading.

- 3 In the Border area, make your selections for the border position, color, and style of the cell.
- 4 In the Additional Formatting Options area, make your selections for column width, height, indent (left padding), right padding, top padding, and bottom padding.

- 5 In the Custom CSS Style Options (HTML Only) area, you can override style and class elements specified in Siebel CRM On Demand Answers style sheets. This capability is for users who know how to work with cascading style sheets.
  - Expand the Custom CSS Style Options (HTML Only) area by clicking the + icon.
  - Click the check box beside the settings you want to use, and then provide the location of the class, style, or style sheet.

For example, for Use Custom CSS Style you can enter valid CSS style attributes, separated by semicolons, such as:

```
text-align: center; color: red
```
- 6 Click OK when you are done to close the dialog box.

## Using Custom Date/Time Format Strings

Custom date/time format strings provide additional options for formatting columns that contain timestamps, dates, and times.

### *To enter a custom date/time format string*

- 1 On the Define Criteria page in Siebel Answers, click the Column Properties button for a column that contains a timestamp, a date, or a time.  
The Column Properties dialog box opens.
  - 2 Select the following option in the Data Format area:  
Override Default Data Format
  - 3 In the Date Format field, select Custom from the drop-down list.
  - 4 In the Custom Date Format field, type the custom format string exactly as shown in the following tables, including left and right bracket characters ([ ]).
- NOTE:** You must type the custom format string into the Custom Date Format field. Custom format strings are not available for selection from the drop-down list.

### General Custom Format Strings

The following table describes some general custom format strings and the results they display. These allow the display of date/time fields in the user's locale.

General Format String	Result
[FMT:dateShort]	Formats the date in the locale's short date format. You can also type [FMT:date].
[FMT:dateLong]	Formats the date in the locale's long date format.

General Format String	Result
[FMT:dateInput]	Formats the date in a format acceptable for input back into the system.
[FMT:time]	Formats the time in the locale's time format.
[FMT:timeHourMin]	Formats the time in the locale's time format but omits the seconds.
[FMT:timeInput]	Formats the time in a format acceptable for input back into the system.
[FMT:timeInputHourMin]	Formats the time in a format acceptable for input back into the system, but omits the seconds.
[FMT:timeStampShort]	Equivalent to typing [FMT:dateShort] [FMT:time]. This formats the date in the locale's short date format and the time in the locale's time format. You can also type [FMT:timeStamp].
[FMT:timeStampLong]	Equivalent to typing [FMT:dateLong] [FMT:time]. This formats the date in the locale's long date format and the time in the locale's time format.
[FMT:timeStampInput]	Equivalent to [FMT:dateInput] [FMT:timeInput]. This formats the date and the time in a format acceptable for input back into the system.
[FMT:timeHour]	Formats the hour field only in the locale's format, such as 8 PM.

### ODBC Custom Format Strings

The following table shows the ODBC standard typed custom format strings and the results they display. These display date/time fields according to the ODBC standard.

ODBC Format String	Result
[FMT:dateODBC]	Formats the date in standard ODBC yyyy-mm-dd format (4-digit year, 2-digit month, 2-digit day).
[FMT:timeODBC]	Formats the time in standard ODBC hh:mm:ss format (2-digit hour, 2-digit minute, 2-digit second).
[FMT:timeStampODBC]	Equivalent to typing [FMT:dateODBC] [FMT:timeStampODBC]. This formats the date in yyyy-mm-dd format, and the time in hh:mm:ss format.
[FMT:dateTyped]	Displays the word date and then shows the date, in standard ODBC yyyy-mm-dd format. The date is shown within single quote characters (').
[FMT:timeTyped]	Displays the word time and then shows the time, in standard ODBC hh:mm:ss format. The time is shown within single quote characters (').
[FMT:timeStampTyped]	Displays the word timestamp and then the timestamp, in standard ODBC yyyy-mm-dd hh:mm:ss format. The timestamp is shown within single quote characters (').

### Custom Format Strings for Integral Fields

The following table shows the custom format strings that are available when working with integral fields. These allow the display of month and day names in the user's locale.

Integral fields hold integers that represent the month of the year or the day of the week. For months, 1 represents January, 2 represents February, and so on, with 12 representing December. For days of the week, 1 represents Sunday, 2 represents Monday, and so on, with 7 representing Saturday.

Integral Field Format String	Result
[MMM]	Displays the abbreviated month name in the user's locale.
[MMMM]	Displays the full month name in the user's locale.
[DDD]	Displays the abbreviated day of the week in the user's locale.
[DDDD]	Displays the full day of the week in the user's locale.

### Custom Format Strings for Conversion into Hours

The following table shows the custom format strings that can be used to format data into hours. These can be used on the following kinds of fields:

- Fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).
- Fields where the output is in [FMT:timeHour] format. (This format displays the hour field only in the locale's format, such as 8 PM.)

Data Conversion Format String	Result
[FMT:timeHour]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and formats the number of hours into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 2 AM, and a value of 12.24 as 12 PM.
[FMT:timeHour(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and formats the number of minutes into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 12 AM, and a value of 363.10 as 06 AM.
[FMT:timeHour(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and formats the number of seconds into an hh display, where hh is the number of hours. Fractional hours are dropped from the value. For example, a value of 600 is formatted as 12 AM, a value of 3600 as 1 AM, and a value of 61214.30 as 5 PM.

### Custom Format Strings for Conversion into Hours and Minutes

The following table shows the custom format strings that can be used to format data into hours and minutes. These can be used on fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).

They can also be used where the output is in [FMT:timeHourMin] format. (This format displays the time in the locale's time format, but omits the seconds.)

Data Conversion Format String	Result
[FMT:timeHourMin]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 12 is formatted as 12:12 AM, a value of 73 as 1:13 AM, and a value of 750 as 12:30 PM.
[FMT:timeHourMin(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 60 is formatted as 12:01 AM, a value of 120 as 12:02 AM, and a value of 43200 as 12:00 PM.
[FMT:timeHourMin(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the number of hours into an hh:mm display, where hh is the number of hours and mm is the remaining number of minutes. For example, a value of 0 is formatted as 12:00 AM, a value of 1.5 as 1:30 AM, and a value of 13.75 as 1:45 PM.

### Custom Format Strings for Conversion into Hours, Minutes, and Seconds

The following table shows the custom format strings that can be used to format data into hours, minutes, and seconds. These can be used on fields that contain integers or real numbers that represent time.

They can also be used where the output is in [FMT:time] format, described in the topic General Custom Format Strings. (This format displays the time in the locale's time format.)

Data Conversion Format String	Result
[FMT:time]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 12:01:00 AM, a value of 126 as 12:02:06 AM, and a value of 43200 as 12:00:00 PM.

Data Conversion Format String	Result
[FMT:time(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 1:00:00 AM, a value of 126 as 2:06:00 AM, and a value of 1400 as 11:20:00 PM.
[FMT:time(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 6.5 is formatted as 6:30:00 AM, and a value of 12 as 12:00:00 PM.

## Advanced Custom Formats

In addition to the formats previously described, you can format dates and times by creating your own format using some of the common date and time formats described in the following table.

For example, using the following formats, you can create the format:

dddd - h:mm tt

which formats the timestamp fields in the following way:

Monday - 4:03 PM

**NOTE:** When using these formats, do not include the square brackets ([ ]) that are required with other formats.

While the following formats do provide greater formatting flexibility, they do not allow date formats to change according to the user's locale setting, which is possible with many of the previous formats.

Some common date and time formats are described in the following table.

Format	Result
d	Number of the day of the month (for example: 1 through 31). Single-digit numbers do not have a leading zero (0).
dd	Like d, but single-digit numbers begin with a 0.
ddd	Three-letter abbreviation for the day of the week (for example: Sun, Mon).
dddd	Full name of the day of the week (for example: Sunday, Monday).
M	Month number (for example, 1, 12). Single-digit numbers do not have a leading 0.
MM	Similar to M, but single-digit numbers begin with a 0.
MMM	Three-letter abbreviation for the month (for example: Jan, Feb).

Format	Result
MMMM	Full name for the month (for example: January, February).
yy	Two-digit number for the year (for example: 06).
yyyy	Four-digit number for the year (for example: 2006)
h	Hour in a 12-hour format. Single-digit numbers do not have a leading 0.
hh	Similar to h, but single-digit numbers begin with a 0.
H	Hour in 24-hour format. Single-digits do not have a leading 0.
HH	Similar to H, but single-digit numbers begin with a 0.
m	Number of minutes. Single-digit numbers do not have a leading 0.
mm	Similar to m, but single-digit numbers begin with a 0.
s	Number of seconds. Single-digit numbers do not have a leading 0.
ss	Similar to s, but single-digit numbers begin with a 0.
tt	AM and PM indicator. Use with h and hh formats.

## Setting Up Column Formulas

Advanced users can create new formulas, or edit existing formulas, using built-in functions. Siebel CRM On Demand Answers supports a wide variety of SQL-92 functions, as well as extensions to SQL-92. Available functions are presented in [Using Functions in Analyses](#) (on page 459).

### *To edit or add a formula*

- 1 Within the Columns area of the Define Criteria page, click the Edit Formula button for a column whose formula you want to edit or add.
- 2 Select the Column Formula tab.
- 3 Select the Custom Headings check box if you want to change the table heading and column heading text.
- 4 Modify the formula, as required, using the buttons below the Column Formula box.
- 5 Select an aggregation rule from the Aggregation Rule drop-down list, as required.
- 6 Select the Bins tab and combine multiple values or ranges into bins, if required. See "To combine multiple values or ranges into bins" below.



- 7 Click OK.

In an analysis, you can also use functions and conditional expressions to present search results in a variety of ways.

#### *To combine multiple values or ranges into bins*

- On the Bins tab, add and name bins to combine multiple values or ranges of values from a given column into bins.

All instances of the different values that make up the bin in the result set will be replaced by the bin name. Aggregations are performed accordingly as well.





## Sorting and Reordering Columns

You will want to select the sort order for the data in a column as well as make sure the columns appear in the order you want.

You can specify the sort order for one or more columns that appear in an analysis. When you click the Order By button, it shows a new image to indicate the sort order that the selected column will apply to the results.

#### *To sort an analysis based on columns*

- 1 Click the Order By button for the column you want to sort by.  
The button changes to indicate the sort order.
- 2 Continue clicking the Order By button until the sort order you want appears.  
The following table describes the available sort orders.

Button	Description
	The selected column will not be used to sort the results.
	The results will be sorted in ascending order, using the items in the selected column.
	The results will be sorted in descending order, using the items in the selected column.
	<p>A number that appears on an Order By button indicates that the column is not the primary sort column applied to the results. The number corresponds to when the sort order is applied.</p> <p>In this example, the column is used as the second sort order column. The up arrow indicates that the results are sorted in ascending order, using the items in the selected column.</p>

## About Using Addresses in Reports

Many reports require the use of address fields. In Siebel CRM On Demand, you can report on addresses in two different ways, depending on your needs. In the Action bar, an address folder with the word Extended in it (for example, Billing Address - Extended) provides reporting on all nine standard address fields included with Siebel CRM On Demand. For details on how each field maps to the address format for specific countries, see [About Countries and Address Mapping](#) (on page 731).

Fields included from the address Extended folder are not drillable in reports. Field labels display consistently regardless of the country for each record or the On Demand user's default company country.

Most of the other address fields in the Action bar (those not in the Extended folder) are drillable when included in reports. The fields displayed will match those associated with the On Demand user's default company country; however, all fields may not appear if the country associated with a specific record is not the same as that of the On Demand user's default company country.

## Combining Results from Multiple Reports Using Set Operations

After you have selected a subject area and added columns to a report, you can combine criteria from one or more subject areas using Set operations. This action combines the results of two or more reports into a single report.

**NOTE:** The number and data types of the columns selected in each component must be the same. The column lengths can differ.

The following table lists the Set operators and describes their effects on results.

Set Operator	Effect on Results
Union	Returns nonduplicate rows from all reports.
Union All	Returns all rows from all reports, including duplicate rows.
Intersect	Returns rows that are common to all reports.
Minus	Returns rows from the first report that are not in the other reports.

### *To combine the results of multiple reports*

- 1 Select a subject area and add columns to the report at the Define Criteria page.
- 2 At the Define Criteria page, click the plus sign in the Advanced section, and then click the Combine with Similar Analysis button.
- 3 In the Subject Area dialog box, select a subject area that contains the data you want to combine with the selections you made in Step 1.  
  
The subject area can be the same as that selected in Step 1, or a different subject area.  
  
The Set Operations page appears.
- 4 Follow the onscreen instructions to build the combined report.
- 5 Click the Set button and select the operation type.
- 6 Select columns from the selection area to combine with the first report.
- 7 If required, define the filters that are specific to the current subject area.
- 8 Add additional subject areas by clicking Edit in the Set Operations section, and then choose Create New Criteria.
- 9 Edit column characteristics (format column, sort) for the combined report by clicking Result Columns in the Set Operations section.  
  
This action displays the resulting columns with buttons that you can use to edit format and sorting.

## Step 2: Creating Layouts

After you define the criteria, you should create the layout for your report. In this step, you can add more views to your layout. These initially show up at the bottom of your layout. You can also add subtotals and totals to your columns.

Views use the presentation capabilities to help you look at results in meaningful, intuitive ways. You can add a variety of views to results, such as charts and pivot tables that allow drilling down to more detailed information, explanatory text, a list of filters that were used to limit the results, and more.

When you run a new report, Siebel CRM On Demand Answers initially displays results in a table, with a title preceding the table. It does this by including a Title view, which displays the name of the saved report, and a Table view, which displays the results in a basic table that inherits the formats, sorting and other options specified in the Define Criteria step. You can customize or delete these existing views for a report, add other views, and combine and position views anywhere in the workspace.

Preparing multiple views of results can help you identify trends and relationships in data. You can then save the report with the collection of views.

Your layout can include any views shown in the following table.

Layout	Description
Title	Use this view to include a title and subtitle, a saved name for the results, and a custom logo to identify the results. For result-specific help, you can include a help icon that links to any HTML page or site that contains information about the report or the results.
Table	Use this view to display data in a column format. You can select to display a page of information at a time, which is convenient for larger result sets, and control the size of the page and the position of the paging controls. Tables are supported in a wide variety of formats and can include graphics, links, and so on, using custom formatters. Using Table view, users can also change the format of the table headings.
Chart	Use this view to drag and drop columns to a layout chart. You have complete control over the title, the location of the legend, axis titles and data labels. You can control the size and scale of the chart, and control colors using a style sheet. In addition, you can drill down into the results. Supported chart types include bar charts, column charts, line charts, area charts, pie charts, scatter charts, bubble charts, and custom subtypes including 2D, 3D, absolute, clustered, stacked, combination, and custom.
Pivot table	Use this view if you want to be able to take row, column and section headings and swap them around to obtain different perspectives. You can drag and drop headings to pivot results, preview them, and apply the settings. Users can navigate through pivot tables and drill down into information. Users can create complex pivot tables that show aggregate and nonrelated totals next to the pivoted data, allowing for flexible analysis. For an interactive result set, elements can be placed in pages, allowing users to select elements. Like the Table view, elements can be formatted using custom formatters.
Gauge	Use the gauge view to show results as gauges, such as dial, bar, and bulb-style gauges.
Active filters	Use this view to show the filters in effect for a report.

Layout	Description
Static text	Use this view to include static text in the results. You can use HTML to include banners, tickers, Active-X objects, Java applets, links, instructions, descriptions, graphics, and so on, in the results.
Legend	Use the Legend view to document the meaning of special formatting used in results, such as the meaning of custom colors applied to gauges.
Column selector	Use column selectors to allow users to dynamically change which columns are displayed in the analysis. This allows users to analyze data along several dimensions and dynamically alter the content of the results.
View Selector	Use the View Selector view to select a specific view of the results from among the saved views. When placed on a dashboard, the view selector appears as a drop-down list where users can make a selection.
Funnel chart	Use this view to display a three-dimensional chart that represents target and actual values using volume, level and color. It is useful for depicting target values that decline over time, such as a sales pipeline.
Narrative	Use this view to display the results as one or more paragraphs of text. You can enter in a sentence with placeholders for each column in the results, and specify how rows should be separated. You can incorporate custom HTML or JavaScript to specify how information is displayed.
Ticker	Use this view to display the results of a report as a ticker or marquee, similar in style to the stock tickers that run across many financial sites on the Web. This view is useful for calling attention to results and for late-breaking information. You can control what information is presented and how it scrolls across the page. This view supports a variety of formats and can include graphics, links, and so on, using custom formatters.
No Results	Use this view to specify explanatory text to appear if the report does not return any results.

Click a topic to see step-by-step instructions to do the following:

- [Adding Titles to Results](#) (on page 406)
- [Adding Tables to Results](#) (on page 407)
- [Showing Results in Charts](#) (on page 409)
- [Showing Results in Pivot Tables](#) (on page 422)
- [Showing Filters Applied to Results](#) (on page 438)
- [Adding Markup Text to Results](#) (on page 439)
- [Allowing Users to Change Columns in Reports](#) (see "Showing Results in Charts" on page 409)
- [Showing Results in Funnel Charts](#) (on page 444)
- [Adding Narrative Text to Results](#) (on page 445)

- [Showing Results in Scrolling Tickers](#) (on page 448)
- [Alerting Users to No Data](#) (on page 452)

## Adding Titles to Results

Use the Title view to add a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results. Titles and subtitles can be formatted.

A Title view is always added to the results, as the first view.

### *To work with a Title view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new Title view, navigate to the Create Layout page, click the Add View button, and then select Title from the drop-down list.
  - To edit an existing Title view, navigate to the Create Layout page, find the Title view, and click the Edit View icon.
- 2 In the Title text box, enter the text to display as the title.

If you do not specify a title, the name of the saved report is used as the title. For unsaved reports, the Title text box is blank.
- 3 If you do not want the saved name of the report to appear, clear the Display Saved Name check box.

If the box is checked, the saved name is displayed below the text in the Title text box (if this text exists).
- 4 (Optional) If you want to display a logo image or other graphic, specify the appropriate path in the Logo text box.

The image is displayed to the left of the title text. The image or graphic should be accessible to all users who view this report.
- 5 (Optional) In the Subtitle text box, enter the text to display as a subtitle.

The subtitle text will follow the actual title, on a new line.
- 6 If you want to add additional formatting to the title or subtitle, do the following:
  - a Click the edit buttons to the right of the Title and Subtitle dialog boxes.
  - b Make your choices for font, cell, and border options, and then click OK.

**NOTE:** If you enter a new caption, it replaces the original title or subtitle.

- 7 If you want to display the report execution date or time, select one of the timestamp options from the Started Time drop-down list.
- 8 If you want to provide a link to customized help or other information related to the report, enter the appropriate URL in the Help URL text box.  
  
The URL should be one that is accessible to all users who will view this report.
- 9 When you are done, you can save the report with the Title view.

## Adding Tables to Results

Use the Table view to show results in a standard table. Users can navigate and drill down in the results. You can add a grand total and column totals, specify custom table and column headings, and change the formula or aggregation rule for a column. You can also edit properties for a column to control the appearance and layout of a column and its contents, and specify formatting to apply only if the contents of the column meet certain conditions.

You can also specify paging controls and the number of rows per page, display column and table headings, apply green bar styling, and enable column sorting. If column sorting is selected, the column headers of the columns that can be sorted have a slightly raised visual appearance.

A Table view is always added to the results, as the second view.

The grand total for columns with the aggregation rule Average will differ in the Table and Pivot Table views. In the Table view, the grand total for a column with an Average aggregation rule is calculated from the database (as a sum divided by a count). In the Pivot Table view, the grand total is the average of the rows in the result set.

**NOTE:** Changes made to the columns in the Table view (for example column format, column order, sort, formulas and so on) can be seen in the Define Criteria page, and changes in the Define Criteria page can be seen in the Table view.

### *To work with a Table view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new Table view, navigate to the Create Layout page, click the Add View button, and select Table from the views drop-down list.
  - To edit an existing Table view, navigate to the Create Layout page, find the table, and then click the Edit View button for the Table view.

The workspace shows the options and settings for the view.

- 2 To view the buttons for working with each column individually, select Header Toolbars with Results in the drop-down list to the right of Display.

- 3 To specify the sort order for one or more columns that appear in a report, click the Order By button for a column.

You can order results by more than one column. If you select more than one column, the order is shown on the Order By button. For more information about sorting, see [Sorting and Reordering Columns](#) (on page 401).

- 4 To specify totals, perform the following actions:
  - To add a grand total, click the Grand Total button at the top, and make sure the option Report-Based Total is selected. (Click the Grand Total button again to see the menu with this option.)
  - To add totals for an individual column, click the Total By button for that column, and make sure the option Report-Based Total is selected (click the Total By icon again for the individual column, to see the menu with this option).

**NOTE:** The Total By button is only available for columns that can be *totaled by*. Typically this is a column that has repeated values that would be summed for a total. Also, if the option Report-Based Total is not selected, the system calculates the total based on the entire result set, before applying any filters to the measures.

- 5 To add custom headings or edit the formula for a column, click the Edit Formula button.

The Edit Column Formula dialog box appears, where you can perform the following actions:

- To specify custom headings, select the Custom Headings check box and enter new heading text into the appropriate location.
- To edit the formula for the column, enter it into the Column Formula text box.
- To change the aggregation rule for the column, make a selection from the Aggregation Rule drop-down list.
- To combine multiple values or ranges of values from a given column into bins, click the Bins tab. Then add and name the bins.

All instances of the different values that make up the bin in the result set will be replaced by the bin name. Aggregations are performed accordingly as well.

- 6 To edit the properties for a column, or to specify formatting to apply if the contents of the column meet certain conditions, click the Format Column button.

The Edit Column Format dialog box appears, where you can make your selections:

- For information about formatting columns and adding conditional formatting, see [Editing Column Properties](#) (on page 388).

- 7 When you are done, you can save the report with the Table view.



*To specify paging controls and the number of rows per page, display column and table headings, apply green bar styling, and enable column sorting*

- 1 At the table view, click the Table View Properties button near the top of the workspace.
- 2 Make your selections for the various options.

## Showing Results in Charts

Use the Chart view to position columns on a chart, and to customize the title, legend location, axis titles, data labels, size, and scale. You can select the chart graph, such as a line chart or a bar chart; the chart subtype, such as two-dimensional; and the style for columns, such as the shape and fill pattern. You can also set borders and colors, and control other chart characteristics. Results are drillable in the Chart view.

Chart graph choices include area charts, bar charts, bubble charts, line charts, and other types. Chart subtypes include 2D, 3D, absolute, clustered, stacked, combination, and custom.

This section explains how to work with charts. It contains the following topics:

- Description of Siebel CRM On Demand Answers Chart Graphs
- Description of Siebel CRM On Demand Answers Chart View Buttons
- General Steps to Add or Modify Chart Views

**NOTE:** Siebel CRM On Demand Answers uses a third-party charting engine. The type of the chart, its size, and the number of elements charted can affect whether axes or legends appear. This is constrained by the amount of available space on the Web browser page. Sometimes, by adjusting the width and height controls, it is possible to get undisplayed axes and legend values to appear.

### Description of Siebel CRM On Demand Answers Chart Graphs

The following table shows the chart graphs available from the Graph drop-down list and describes their uses. Not all chart graphs are appropriate for all types of data. The default chart graph is a vertical bar chart.

Chart Graph Type	Description
Area	<p>An area graph is similar to a line graph, but with the areas under the lines filled in. Area graphs show the percentage of the whole that each variable comprises.</p> <p>Area graphs are useful for observing changes in cumulative value or percentage over time; for example, by comparing groups on certain measurements such as outcome, and displaying group trends.</p>

Chart Graph Type	Description
Horizontal Bar	<p>A horizontal bar graph can be used to compare facts by showing bars in a horizontal direction.</p> <p>Horizontal bar graphs are useful for comparing differences among like items; for example, competing product sales, same product sales over different time periods, or same product sales over different markets.</p>
Bubble	<p>A bubble graph is a variation of a scatter graph that displays data elements as circles (bubbles). It shows three variables in two dimensions. One value is represented by the location of the circle on the x-axis. Another value is represented by the location of the circle on the y-axis. The third value is represented by the relative size of its circle.</p> <p>Bubble graphs are useful for plotting data with three variables, and for displaying financial data over a period of time.</p> <p><b>TIP:</b> To create a bubble graph, plot one fact on the x-axis, another fact on the y-axis, and a third fact on the bubble radius axis. These three facts are plotted for selections on the Level axis.</p>
Vertical Bar	<p>A vertical bar graph compares facts using vertical columns.</p> <p>Vertical bar graphs are useful for comparing differences among like items.</p>
Line	<p>A line graph can be used to plot multiple facts.</p> <p>Line graphs are useful for showing patterns and trends in data.</p>
Line Bar Combo	<p>A line bar combination graph plots two sets of data with different ranges, one set as bars, and one set as lines overlaid on the bars.</p> <p>Line bar combination charts are useful for showing trend relationships between data sets.</p> <p><b>TIP:</b> You can specify any mix of bars and columns, but there must be one of each. Specifying all columns as lines works, but if you want only bars, use a bar chart. (When only bars are selected for this chart type, some column selections may be drawn as lines.)</p>
Pareto	<p>A pareto graph is a form of bar chart and line chart that displays criteria in descending order. In this graph type, the line shows a cumulative total of the percentages.</p> <p>Pareto graphs are useful for identifying significant elements, such as best and worst or most and least.</p>
Pie	<p>A pie graph shows data sets as percentages of a whole.</p> <p>Pie graphs are useful for comparing parts of a whole, such as sales by region or by district.</p>

Chart Graph Type	Description
Radar	<p>A radar graph plots the same information as a bar graph, but instead displays data radiating from the center of the graph. Each data element has its own value axis.</p> <p>Radar graphs are useful for examining overlap and distribution.</p>
Scatter	<p>A scatter graph displays x-y values as discrete points, scattered within an x-y grid. It plots data points based on two independent variables. This allows you to plot large numbers of data points and observe the clustering of data points.</p> <p>Scatter graphs are useful for observing relationships and trends in large data sets.</p> <p><b>TIP:</b> To create a scatter graph, plot one fact on the x-axis and plot another fact on the y-axis. These facts are plotted for selections on the Level axis.</p>
Step	<p>A step graph is similar to a line graph. It can also be used to plot multiple facts.</p>

Your selection for the chart graph determines the chart subtypes that are available from the Type drop-down list. Not all chart types have subtypes; for example, bubble and radar graphs have no subtypes. Charts subtypes default to the 3D option, if available. Depending on the chart type selection, subtype options may include the following:







- Area charts: 3D and 2D
- Bar charts: 3D, 2D, 3D Stacked, and 2D Stacked
- Line charts: 3D and 2D
- Pareto charts: 3D and 2D
- Pie charts: 3D and 2D
- Scatter charts: Scatter, and Scatter with Lines
- Step charts: 3D and 2D

Your selection for the chart type also determines the styles that are available from the Style drop-down list. Not all chart types have styles. The style defaults to solid fill, if available. Depending on the chart type selection, styles for charts may include the following:

- Area charts: Solid Fill and Pattern Fill
- Bar charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill
- Line charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill
- Pareto charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill
- Pie charts: Solid Fill and Pattern Fill

## Description of Siebel CRM On Demand Answers Chart View Buttons

The buttons at the top of the Chart view page provide access to various chart settings. The following table describes the Chart view buttons and settings.

Chart View Button	Description
	Sets general properties for the chart, such as its title, whether data labels appear, and the chart size.
	Controls the display of axis title and data labels at the bottom of the chart and to the left of the chart.
	Sets the axis scaling properties, the number of tick marks, and the scale type.
	Controls additional charting options such as: <ul style="list-style-type: none"> <li>the display of grid lines on the chart</li> <li>the location of the legend, and provides options for resizing the legend</li> <li>background, text, and border colors</li> <li>how users interact with the chart when they click it, such as drilling down to lower-level data, or navigating automatically to a related saved report or a Web site</li> </ul>
	Allows users to format the visual appearance of chart series such as color, line width, and line symbols.
	For pie charts, allows users to make selections for data labels.

## Description of Basic Chart Components

You can define basic components for a chart. The following table describes the components you can customize.

**NOTE:** Some components are only available for specific chart types. For example, a pie chart does not have axes. The type of chart you select determines which components are applicable.

Chart Component	Description
Measure labels	Controls the position and formatting of the column heading for the data in the Measures section. It also provides totaling and ordering capabilities. If there is only one measure, you can exclude this element.

Chart Component	Description
Legend	Use the legend to explain the chart. You can specify a location for the legend, and if it can be truncated.
Axes	The horizontal and vertical lines that identify the scale of the chart. You can specify horizontal and vertical axes for the chart.
Grid Lines	A matrix of horizontal and vertical lines that help you to visually relate any point on a chart to the axes. You can specify the colors for grid lines.
Scale Markers	Identify the scale of the chart. You can specify properties such as location, size, color, line width and range.
Drill	Display more detail. You can specify if and how a user can drill down to access further details about the information presented in the chart.
Title	Specify a title to describe the chart.
Axis title, labels and limit	Specify if and how you want titles and scale labels to appear on the axes of your chart.
Chart series	Format elements of the visual appearance of chart series, such as color, line width, and line symbols. You can also apply rule-based formatting, such as applying a certain color when a position of the series is equal to a specified value.
Tick Marks	Subdivide the scale markers on an axis, to enhance detail.
Data Labels	Show the numeric value of data as you roll the mouse over the chart.

## General Steps to Add or Modify Chart Views

The following procedure provides the basic steps to add or modify a Chart view.

**NOTE:** If you select a chart graph that is incompatible with the results, no results are shown.

### *To add or modify a Chart view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new Chart view, navigate to the Create Layout page, click the Add Views button, and select Chart from the views drop-down list.
  - To edit an existing Chart view, navigate to the Create Layout page, find the chart, and click the Edit View button.

The workspace shows the options and settings for the view.

- 2 Make your selections for the chart graph, subtype, and style.

Your selection for the graph type determines the available choices for the subtype and style. When no subtypes or styles are available, the drop-down lists become unavailable.

As you make selections from the drop-down lists, the Chart view changes to reflect your selections.

- 3 To add a column to the chart, click it in the Action bar, or add it from the Define Criteria page.

**NOTE:** This will add the column to the report overall; you will see it in Define Criteria and also in Table views.

- 4 To delete a column from the chart, navigate to the Define Criteria page and click the Remove Column button for the column.
- 5 Use the buttons at the top of the Chart view page to specify additional chart settings.
- 6 To see the effects of your changes, click the Redraw button.

You can click the Redraw button at any time to refresh the Chart view.
- 7 To remove changes and start from the original chart, click the Restore Default button.
- 8 To resize the chart, use the vertical and horizontal slide bars.
- 9 Save the report.

### **Specifying General Chart Properties in Chart Views**

You can set general properties for the chart, such as a title and the appearance of data labels.

Data labels are enabled by default for selected 2D chart types.

The default for chart size is to scale all elements of the existing chart, including height and width, to fit the available space. The chart's height and width remain proportional to each other when the size of the chart changes. The chart automatically resizes chart elements based on the space available within the chart.

**NOTE:** The chart can expand significantly if the number of items being charted grows substantially.

For example, suppose you create a report to display the sales of three products, create a chart of the results with the product sales shown as three columns, and size the chart to occupy about 25 percent of the page. If the report is run later and six products are returned, the chart is expanded to twice its original width, or about 50 percent of the page, so that the widths of the individual columns in the chart remain constant.

The chart elements are resized as needed to fit into the chart. Using the preceding example, the chart continues to occupy about 25 percent of the page, and the columns are resized to fit in the available space.

You can specify a fixed size for the chart in General Chart Properties. This will override the default behavior.

#### *To set general properties for a chart view*

- 1 Click the following button at the top of the chart view page:



The General Chart Properties dialog box appears.

- 2 Make your selections and click OK.

The chart view refreshes. The chart may resize to accommodate your selections.

## Controlling the Display of Grid Lines in Chart Views

You can control whether grid lines display on the chart, and specify grid line colors.

#### *To control the display of grid lines on a chart view*

- 1 Click the following button at the top of the chart view page:



The Additional Charting Options dialog box appears.

- 2 Click the Grid Lines tab, make your selections, and click OK.

The chart view refreshes.

## Specifying the Location of the Legend in Chart View

You can specify the location of the legend, and set options for resizing the legend.

### *To specify the location of the legend on a chart view*

- 1 Click the following button at the top of the chart view page:



The Additional Charting Options dialog box appears.

- 2 Click the Legends tab, make your selections, and click OK.

The chart view refreshes. The chart may resize to accommodate your selections.

## Setting Colors for Background, Text, and Borders in Chart View

You can specify the color for the chart background, text, and borders.

### *To specify background, text, and border colors on a chart view*

- 1 Click the following button at the top of the chart view page:



The Additional Charting Options dialog box appears.

- 2 Click the Borders & Colors tab, make your selections, and click OK.








The chart view refreshes.

## Selecting the Columns to Display as Axes in Chart View

The column area on the left side of the chart view shows the columns that are included in the report. You can select the columns to display as the different axes in the chart. You can also indicate whether measure labels appear for factual data plotted on an axis.

The available axes can change depending on the type of chart selected from the Graph drop-down list. The chart axis buttons used in chart view are described in the following table.



Chart Axis Button	Axis
	Level axis (for scatter and bubble graphs)
	Horizontal axis
	Vertical axis (for a radar graph, this is the fact axis)
	Legend
	Overlay axis (for a line bar combo graph)
	Radius axis (for a bubble graph)
	Pie Values axis (for a radar graph, this is the radar axis)

***To select the columns to display as the axes on a chart view***

- 1 In the columns area to the left of the chart, click the appropriate check box for one of the axis buttons to display that column as the corresponding axis in the chart.  
The axis buttons change depending on the type of graph selected from the Graph drop-down list.
- 2 To add a column to the chart, click it in the selection area, and then set it as an axis.  
This is equivalent to adding the column to the report at the Define Criteria page.
- 3 Click Redraw to refresh the chart view.

## Setting Axis Scaling Options in Chart View

You can control axis limits, tick marks and scale type, and the properties of scale markers.

### *To specify axis scaling options for a chart view*

- 1 Click the following button at the top of the chart view page:



The Axis Scaling dialog box appears.

- 2 Make your selections and click OK.

For charts with numeric axes, the settings of the axis scaling options determine how the scale is selected:

- When you select Default, the system selects the scale and sets the axis to zero (0) for positive numbers.
- When you select Zoom to Data Range, the system selects the scale. It evaluates the range of values on the axis, and selects appropriate minimum and maximum values for the scale. This is useful when charting a set of large values that are all within a small percentage of each other. The chart zooms in on the values so differences are more easily distinguished.
- You can also manually set the axis scaling values to specific numbers.

The chart view refreshes. The chart may resize to accommodate your selections.

## Editing Scale Markers in Chart View

Scale markers are accenting lines or shaded background ranges that mark key points, thresholds, ranges, and so on. The lines or ranges can be applied on one or more axes, depending upon the type of chart. Lines appear in front of the chart information, whereas ranges appear in the background.

**NOTE:** Some chart types, such as pie charts, do not use scale markers.

The following procedure provides the general steps to edit a scale marker.

### *To edit scale markers for a chart view*

- 1 Click the following button at the top of the chart view page:



The Axis Scaling dialog box appears.

- 2 Click the following button:

Edit Scale Markers

The Scale Markers dialog box appears.

- 3 Click the Add button to add the first scale marker and make your selections for the marker.

Advanced options include setting the scale to a static value, a particular column name, or as the result of an SQL query. For more information about the types of scale markers and using the advanced options, see the procedures that follow this one.

- 4 Click OK successively to close the dialog boxes.

The chart view refreshes. The chart may resize to accommodate your selections.

#### *To create a line scale marker*

- 1 Select Line from the Type drop-down list.
- 2 Enter a line width in the third column. This value is the thickness of the line, in pixels.
- 3 Enter the position for the line in the fourth column. The position indicates where on the axis the line will be located. For example, if your left axis has values from 0 to 100 and you specify a position of 40, you see a horizontal line intersecting the 40 position on the vertical axis.
- 4 Enter the color for the line.
- 5 Enter a caption for the line.

The caption appears when a user pauses the mouse over the line in the chart, and in the legend.

#### *To create a range scale marker*

- 1 Select Range from the Type drop-down list.
- 2 Enter the low end of the range in the third column.
- 3 Enter the high value of the range in the fourth column.

**NOTE:** You must specify values that appear on the same axis as the range. For example, if your left axis has values from 0 to 100 and you specify 20 for low and 40 for high, the graph background will appear in the color you specify for the range between those values.

- 4 Enter the color for the range.
- 5 Enter a caption for the range. The caption appears in the legend.

### Using Advanced Settings for Range and Line Values

Options for these values include a static value, a value sourced from a column included in the report, or one derived from an SQL query.

#### *To specify an advanced setting*

- 1 Next to the field, click the Properties button.
- 2 Select one of the options, and enter appropriate values.
- 3 Click OK.

### Specifying Axis Titles and Labels in Chart View

You can specify:

- if the axis titles and data labels display at the bottom and to the left of the chart
- if the labels are rotated (to fit better)
- the maximum label length
- the text for the label (if different from the default).

**NOTE:** Adjusting the size of a chart can affect how the axis labels appear.

#### *To specify an axis title on a chart view*

- 1 Click the following button at the top of the chart view page:



The Axis Titles and Labels dialog box appears.

- 2 Make your selections, and click OK.

The chart view refreshes.

**NOTE:** When you set the Limit label length, specify the total number of characters that a label can contain. An ellipsis (...) will appear where any additional characters have been truncated.

## Specifying What Happens When a User Clicks a Chart

When a user views the chart, you can specify the type of interaction to occur if the user clicks the chart. The following are the types of interactions for a chart:

- **Drill.** Allows the user to drill down to more detailed information. This is the default interaction if a drill path is automatically configured. If no drill path is initially available, use Navigate to configure a custom drill path.
- **Navigate.** Allows the user to navigate to another saved report or dashboard.
- **None.** Disables drilling down or navigation from the chart.

### *To specify the user interaction with a chart view*

- 1 Click the following button at the top of the chart view page:



The Additional Charting Options dialog box appears.

- 2 Click the Interaction tab, and make your selection for the interaction.
- 3 Click OK.

## Formatting the Visual Appearance of Chart Series

Chart series formatting allows users to customize individual series components, based on their position. Users can format the visual appearance of chart series such as color, line width, and line symbols.

For example, on a line bar combination chart with two data series, assume that the bar is position 1 and the line is position 2. Users can change the color of the bar, the width of the line, and the symbol representing the data points. Users can also apply rule-based formatting, such as applying a certain color when a position of the series is equal to a specified value.

### *To format the appearance of chart series*

- 1 Click the following button at the top of the chart view page:



The Series Format Control dialog box appears. The available choices depend upon the chart type. For example:

- To customize a series, deselect the Use Default check box.
- To restore a series to its default settings, reselect the Use Default check box.

- To add a new format series control, click the Add button. Even if the current chart does not use this series, it will be used if it is needed (such as for drilling).
- To return all series to their default values, click the Clear All button.
- To change colors, click the color box to access the Color Selector dialog box.
- To change other series attributes, click the desired tab, and select bar or line attributes.

- 2 Click OK.

### Making Selections for Data Labels in Pie Charts

Data labels appear when a user pauses the mouse over elements in the pie chart. You can specify how values should appear and what the data labels should display.

You can show values as percentages of the total or as actual values. Data labels can display the value or name only, or both the value and name.

Depending on your selection, the chart may resize to allow the data labels to appear.

#### *To make selections for data labels*

- 1 Click the following button at the top of the chart view page:



- 2 Make your selections for the value and what the data label should show.
- 3 Click OK.

### Showing Results in Pivot Tables

The Pivot Table view is an interactive view that allows you to rotate the rows, columns, and section headings to obtain different perspectives of the data. Pivot tables are navigable and drillable, and are especially useful for trend reports.

This section provides the general steps to create a pivot table and describes additional pivot table formatting options.

## General Steps for Adding or Modifying Pivot Table Views

When you add or modify a pivot table, the columns included in the report appear as elements in the pivot table template.

The following table describes pivot table positions.

Position	Description
Pages	Provides an interactive result set that allows users to select the data they want to view. The values from the columns that appear in the Pages position are used as the initial filter criteria. The values appear in a drop-down list for selection. Based on that selection, a pivot table (composed of the Sections, Columns, Rows, and Measures defined in the pivot table) appears.
Sections	Provides initial filter criteria. For each value in the Section column, a unique pivot table appears, composed of the Columns, Rows, and Measures defined in the pivot table.
Columns	Shows an element in a column orientation. Pivot tables can contain multiple columns.
Rows	Shows an element in a row orientation. Like columns, pivot tables can contain multiple rows.
Measures	<p>Populates the section of a pivot table that contains summary data. The elements in the Measures area are summarized based on the elements in the page, section, row, and column fields. Each value in the Measures elements represents a summary of data from the intersection of the source rows and columns.</p> <p>The Measure Labels element, which appears in the Columns area by default, controls the position and formatting of the column heading for the data in the Measures section. It also provides totaling and ordering capabilities. If there is only one measure, this element can be excluded.</p>
Excluded	Excludes columns from the pivot table results. Any column that is added as criteria for the report after the pivot table has been created is added as excluded.

### To add or modify a Pivot Table view

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new Pivot Table view, navigate to the Create Layout page, click the Add View button, and select Pivot Table from the views drop-down list.
  - To edit an existing Pivot Table view, navigate to the Create Layout page, find the pivot table, and then click the Edit View button for the Pivot Table view.

The workspace shows the options and settings for the view.

- 2 To view the pivot table template and buttons for working with each column individually, select the Show Controls check box.  
The workspace shows the pivot table template.
- 3 Drag and drop the report columns, which appear as elements in the pivot table, to the desired positions in the pivot table template.
- 4 To see a preview, select the Display Results check box.  
You can click the Display Results link to refresh the results.
- 5 To add a Chart view next to the pivot table, select the Chart Pivoted Results check box.  
For information about the Chart view, see [Showing Results in Charts](#) (on page 409).
- 6 To change the location of the chart relative to the pivot table, select the location from the Chart Position list.  
You can also choose to see only the chart and hide the table by selecting Chart Only from the list.
- 7 To sort the results, click the Order By button for the column on which you want to sort.  
The button changes to indicate the sort order:
  - An up arrow indicates ascending sequence.
  - A down arrow indicates descending sequence.For more information about sorting, see [Sorting and Reordering Columns](#) (on page 401).
- 8 To add totals, perform the following actions:
  - a For totals in the Pages, Sections, Rows, and Columns areas, click the Totals button and make a selection:
    - For no totals, select None. The Totals button appears with a white background (default).
    - To show the total before or after the data items, select Before or After. For example, if you add a total on a row containing regions and specify the Before option, the total is shown before individual districts in the region are listed.
  - b For totals in the Measures area, click the More Options button for the row or column to be totaled, select Aggregation Rule, select a value, and make sure the option Report-Based Total is selected.

**NOTE:** If the option Report-Based Total is not selected, the system calculates the total based on the entire result set, before applying any filters to the measures.

Depending on the position of this element, the totals for the summary data represented by the Measures elements display as a column or row. Column and row totals include labels.

When the Totals button is dimmed, no totals will appear.



- 9 To work with additional options for a column, measure, or row, click the More Options button and make a selection from the drop-down list.
- 10 To format labels or values for a column, click the Totals button or the More Options button, and then select the appropriate format option.
- 11 Save the report.

## Using Multiple Page Drop-Down Lists in Pivot Tables

When you place multiple attributes in the Pages area in the pivot table, you can create a multiple drop-down list page. Then, when users view the pivot table, they see a drop-down list for each attribute, rather than a concatenated list of attributes placed in the page heading (the default).

For example, if you place Region and Brand in the pages area, a Region drop-down list allows the user to select a particular region, and see the data for only that region, rather than seeing Region concatenated with Brand.

### *To create an independent drop-down list in a Siebel CRM On Demand Answers pivot table*

- 1 Drag and drop your target attributes into the Pages area.
- 2 Click the More Options button on the second (or any subsequent) attribute in the Pages layout area.
- 3 Select the option Start New Page Drop Down.

The drop-down list for the attribute appears above the preview of the pivot table.

You can create drop-down lists for other attributes in the Pages area. When the report is saved, the drop-down lists will be available to users with access to the report.

## Overriding Default Aggregation Rules in Pivot Tables

You can override the default aggregation rule for a measure, which is specified by either the original author of the report or by the system.

### *To override the default aggregation rule for a measure in a pivot table*

- 1 Click the More Options button for the measure whose default aggregation rule you want to override.
- 2 Select the option Aggregation Rule, and then select the aggregation rule to apply.

### Adding Formatting in Pivot Tables

You can apply green bar styling and cosmetic formatting to a pivot table. You can also customize the appearance of sections, rows, columns, measures, and the content that they contain.

For example, you can specify font, cell, border, and style sheet options for sections, values, and measure labels. For sections, you can include and customize the position of column headings together with the values in that section. You can also insert page breaks, so that every time a value changes in the section, the new section appears on a new page.

You can also add conditional formatting, which helps direct attention to a data element if it meets a certain threshold. To add conditional formatting to a column in a pivot table, see [Editing Column Properties](#) (on page 388).

### Adding Green Bar Styling and Cosmetic Formatting to a Pivot Table

Green bar styling shows alternating rows or columns in a light green color. Cosmetic formatting affects the overall appearance of the pivot table and also allows you to change the default green bar color.

#### *To add green bar styling and cosmetic formatting to a pivot table*

- 1** At the pivot table view, click the Table View Properties button near the top of the workspace.
- 2** To add green bar styling, click the green bar styling check box.  
To change the way the styling is applied, make a selection from the drop-down list.
- 3** To add cosmetic formatting, click the alternate formatting button.  
The cosmetic formatting dialog box appears.
- 4** To change the default green bar color, select a new background color for the cell format.  
For more information about cosmetic formatting, see [Changing Appearance of Reports](#) (on page 376).

### Adding Formatting for Sections and Section Content

Section and content formatting options allow you to do the following:

- Include and customize the position of column headings together with the values in that section.
- Insert page breaks. Every time a value changes in the section, that new section will appear on a new page. This is useful for data-driven detail reports.
- Apply cosmetic formatting to a section and its content.

***To add formatting for sections in a pivot table***

- 1 At the pivot table view, click the Section Properties button.  
The Section Properties dialog box appears.
- 2 To format the appearance of the section, make selections from the Section Properties tab.
- 3 To format the appearance of the section content, make selections from the Content Properties tab.

For information about applying cosmetic formatting, see [Changing Appearance of Records](#) (see "Changing Appearance of Reports" on page 376).

**Adding Formatting for Rows**

Row and row content formatting options allow you to do the following:

- Apply cosmetic formatting to rows, row headings, and row values.
- Use a row in pivot table calculations but suppress its display in results.
- Define a new calculated item for use in a pivot table.
- Duplicate the row in the pivot table.
- Remove a column from the pivot table view.

***To add formatting for rows***

- At the pivot table view, click the More Options button for the row and make a selection from the drop-down list.
  - To apply cosmetic formatting to row headings or values, select the appropriate option.
  - For information about applying cosmetic formatting, see [Changing Appearance of Records](#) (see "Changing Appearance of Reports" on page 376).
  - To hide a row from the output, select Hidden.
  - To define a new calculated item, see Building Calculations in Pivot Tables.
  - To duplicate the row in the pivot table, select Duplicate Layer.
  - To remove the column from the report, select Remove Column.
  - The column is removed from the pivot table and all other result views for the report.

**NOTE:** The Data Format settings for columns included in the Measures area inherit the settings for columns in the section.

### Displaying Running Sums in Pivot Tables

Numeric measures in a pivot table can be displayed as running sums, where each consecutive cell for the measure displays the total of all previous cells for that measure. This option is a display feature only that has no effect on actual pivot table results.

Typically, running sums would be displayed for duplicated columns or for measures for which the option to show data as a percentage of the column has been selected, with the last value being 100 percent. Running sums apply to all totals. The running sum for each level of detail is computed separately.

Column headings are not affected when the running sum option is selected. You can format the column heading if you want it to indicate that the running sum option is in effect.

The following usage rules are in effect for running sums:

- A running sum is incompatible with the SQL RSUM function (the effect would be a running sum of the running sum).
- All running sums are reset with each new section. A running sum does not reset at a break within a section or continue across sections.
- If a measure does not display in a single column or in a single row, the measure is summed left to right and then top to bottom. (The lower right cell will contain the grand total.) A running sum does not reset with each row or column.
- Rolling minimums, maximums, and averages are not supported.

#### *To display a measure as a running sum*

- In the Measures area, click the More Options button for the row or column to be summed and select the following option:

Display as running sum

### Showing an Item's Relative Value in Pivot Tables

You can dynamically convert a stored or calculated measure on a pivot table into a percent or an index. This shows the relative value of the item, compared to the total, without the need to explicitly create a calculation for it.

For example, if you are using a pivot table to examine sales by region, you can duplicate the sales measure and view it as a percentage of the total. This allows you to see the actual sales, and the percentage of sales, that each region accounts for.

You can view the measure as a percentage between 0.00 and 100.00, or as an index between 0 and 1. Deciding which method to use is at your discretion.

***To show an item as a relative value in a pivot table***

- 1 At the pivot table view, click the More Options button for the item you want to show as a relative value.

The following step is optional. When you duplicate the measure in the pivot table, you can see both the total for the measure and its relative value. This eliminates the need to add the column twice on the Define Criteria page to see the total and its relative value in the pivot table.

- 2 To duplicate the measure, select the option Duplicate Layer.

The measure appears a second time in the pivot table, with the same name. If you want to rename the measure, click More Options and select Format Headings, then enter the new name in the first field.

- 3 Select the option Show Data As and select Percent of or Index of, and then select the appropriate submenu option.

**NOTE:** The option Show Data As is available only for items that are stored or calculated measures.

The options for Percent of and Index of are shown in the following table. For Percent of choices, the number of decimal places is dependent upon the type of measure.

**Using Calculations in Pivot Tables**

You can use calculations in a pivot table to obtain different views of the data. The calculations allow you to override the default aggregation rule specified in the system, and for an existing report, the aggregation rule chosen by the author.

The following table describes the calculations that you can use in pivot tables.

Calculation	Description
Default	Applies the default aggregation rule as in the Siebel CRM On Demand Answers repository or by the original author of the report.
Sum	Calculates the sum obtained by adding up all values in the result set. Use this on items that have numeric values.
Min	Calculates the minimum value (lowest numeric value) of the rows in the result set. Use this on items that have numeric values.
Max	Calculates the maximum value (highest numeric value) of the rows in the result set. Use this on items that have numeric values.
Average	Calculates the average (mean) value of an item in the result set. Use this on items that have numeric values. Averages on pivot tables are rounded to nearest whole number.
First	In the result set, selects the first occurrence of the item.
Last	In the result set, selects the last occurrence of the item.

Calculation	Description
Count	Calculates the number of rows in the result set that have a nonnull value for the item. The item is typically a column name, in which case the number of rows with nonnull values for that column are returned.
Count Distinct	Adds distinct processing to the Count function. This means that each distinct occurrence of the item is counted only once.
Formula	Opens a toolbar that lets you select mathematical operators to include in the calculation.
Server Complex Aggregate	This setting forces the aggregation rule to be determined and calculated by the Analytics Server, rather than the Pivot table. It issues an 'AGGREGATE(x by y)' statement which the Analytics server interprets to mean: use the most appropriate aggregation rule for measure 'x' to get it to level 'y'.
None	No calculation is applied.

For more information about SQL functions, see [Using Functions in Analyses](#) (on page 459).

## Building Calculations in Pivot Tables

You can build calculations for items in the Pages, Sections, Rows, and Columns areas.

### *To build a calculation for an item in a pivot table*

- 1 In the Sections or Rows area, click the More Options button for the measure on which you want a calculation performed.
- 2 Select the option New Calculated Item.  
The Calculated Item window appears.
- 3 Assign a name for the calculation in the Name field.
- 4 To build a calculation other than a formula, select from the following options:
  - To build one calculation, select the function to work with from the Function drop-down list, and click on one or more items in the Values list to add them to the Function field.
  - To build multiple calculations for multiple items, type the functions and click on the item names to add them to the Function field.
  - If you are averaging a column with a type of integer, change the formula for the column to cast it to a double (floating point) type. For example, if the current formula is x, change it to CAST(x as double).

**NOTE:** Averages on pivot tables are rounded to the nearest whole number.

- 5 To build a formula, select the Formula function.

**NOTE:** A formula creates a dynamic custom grouping within the pivot table. All measures referenced in a formula must be from the same logical column and must be present in the results. Formulas can be inserted into, or combined with, other calculations.

The mathematical operators become visible. The operators are shown in the following table.

Operator	Description
+	Plus sign, for an addition operation in the formula.
-	Minus sign, for a subtraction operation in the formula.
*	Multiply sign, for a multiplication operation in the formula.
/	Divide By sign, for a division operation in the formula.
\$	Dollar sign, for acting upon the row position of an item in a formula.
(	Open parenthesis, to signify the beginning of a group operation in the formula.
)	Close parenthesis, to signify the ending of a group operation in a formula.

- a In the Function field, build the formula by typing or clicking measure names, and clicking operators to insert them into the formula.
  - b Use parentheses, where appropriate.
- 6 When the calculation is complete, click Finished.

If any errors are detected, a message will appear. Correct the error and click Finished again.

## Examples of Calculations in Pivot Tables

The examples and explanations in this section assume that you have a basic understanding of SQL and its syntax. The examples are hypothetical. Not all possible calculations are shown.

**Example 1.** This example obtains the value of the current measure, such as dollar sales, for each of the products SoftDrinkA, SoftDrinkB, and SoftDrinkC, and adds the values together.

```
sum(' SoftDri nkA' , ' SoftDri nkB' , ' SoftDri nkC' )
```

This is equivalent to selecting Sum from the Function drop-down list, and then typing or clicking 'SoftDrinkA','SoftDrinkB','SoftDrinkC' to add them to the Function field.

**Example 2.** This example obtains the minimum current measure, such as dollars in sales, for SoftDrinkA or SoftDrinkB, whichever is lower.

```
mi n(' SoftDri nkA' , ' SoftDri nkB' )
```

In Example 1 and Example 2, each functional calculation is performed for each item in the outer layer, such as the Product layer. For example, if Year and Product are laid out on an axis, and one of the preceding calculations is built on the Product layer, the results will be computed per year.

**Example 3.** This example obtains the values for each item in the outer layer, such as Year and Product, and adds them together.

```
sum(*)
```

**Example 4.** This example obtains the current measure, such as dollar sales, of the item from the first, second, and third rows, and sums them.

```
sum($1, $2, $3)
```

Instead of specifying a named item, such as SoftDrinkA, you can specify \$n or \$-n, where n is an integer that indicates the item's row position. If you specify \$n, the measure is taken from the nth row. If you specify \$-n, the measure is taken from the nth to the last row.

For example, for dollar sales, \$1 obtains the measure from the first row in the data set, and \$-1 obtains the measure from the last row in the data set.

**Example 5.** This example adds sales of SoftDrinkA, SoftDrinkB, and SoftDrinkC.

```
' SoftDri nkA' + ' SoftDri nkB' + ' SoftDri nkC'
```

This is equivalent to the following calculation:

```
sum(' SoftDri nkA' , ' SoftDri nkB' , ' SoftDri nkC' )
```

**Example 6.** This example adds sales of SoftDrinkA with sales of diet SoftDrinkA, then adds sales of SoftDrinkB with sales of diet SoftDrinkB, and then returns the maximum of these two amounts.

```
max(' SoftDri nkA' + ' di et SoftDri nkA' , ' SoftDri nkB' + ' di et SoftDri nkB' )
```

## Showing Results as Gauges Using Gauge View

Use the gauge view to show results in gauges. Gauges are useful for showing performance against goals. Supported gauge types include dial, bar, and bulb-style gauges.

You can select the type of gauge and customize its appearance, including the title, the ranges to show, how many gauges to display in a row, and other characteristics such as gauge width and dial and indicator needle size. You can also set thresholds, borders and colors, and control other gauge characteristics.

Gauges are navigable. When a user clicks it, you can direct the user to another saved report.



## Description of Gauges in Siebel CRM On Demand Answers

This section describes gauge types, subtypes, and sizes.

### Gauge Types

The following table shows the gauges available from the Gauge drop-down list and describes their uses. The default gauge is a dial gauge.

Gauge Type	Description
Dial	A dial gauge shows data using a dial with one or more indicator needles that change position to indicate where the data falls within predefined limits.
Bar	A bar gauge shows data using a single bar that changes color to indicate whether the data is within predefined limits.
Bulb	A bulb gauge shows data using a circle that changes color to indicate whether the data is within predefined limits. An array of bulb gauges is particularly useful for scorecard-type output.

### Gauge Subtypes

Your selection for the gauge type determines the gauge subtypes that are available from the Type drop-down list. The dial gauge has no subtype. Gauge subtypes include the following:






- Bar gauges: Filled and LED-style. The default subtype is filled.
- Bulb gauges: 3-dimensional (3D) and 2-dimensional (2D). The default subtype is 3D.

### Gauge Sizes

Gauge sizes include small, medium, large, and custom. The default size is medium.

## Description of Siebel CRM On Demand Answers Gauge View Buttons

The buttons at the top of the gauge view page provide access to various gauge settings. The following table describes the gauge view buttons and settings.

Gauge View Button	Description
	Allows you to set general properties for the background on which the gauge appears.
	Allows you to specify a title, a subtitle, a footer, and a secondary footer for the gauge.
	Allows you to specify the ranges to represent in the gauge.
	Allows you to specify additional gauge properties, including control over the appearance of elements within the gauge, setting properties for gauge limits and tick marks, and specifying the interaction to occur when a user clicks the gauge.
	Allows you to set advanced properties for the dial in a dial gauge, including how scale labels are displayed, and the arc length and thickness of the dial.

## General Steps to Add or Modify Siebel CRM On Demand Answers Gauge Views

The following procedure provides the basic steps to add or modify a gauge view.

**NOTE:** If you select a gauge type that is incompatible with the results, no results are shown.

### To add or modify a Siebel CRM On Demand Answers gauge view

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new gauge view, click Step 2 - Create Layout and select Gauge from the views drop-down list.
  - To edit an existing gauge view, click Step 2 - Create Layout, and then click the Edit View button for the gauge view.

The workspace shows the options and settings for the view.

- 2 Make your selections for the gauge, type, and size from the drop-down lists.
- 3 For all gauge types, use the Measures drop-down list to select the measure to gauge.

- 4 For dial gauges, use the Marker Type drop-down list select the indicator needle to use, such as a compass, arrow, or line.
  - a To select a color for the indicator needle, click the Color button and make a selection.
  - b To add another indicator needle, click the Add Marker button.
- 5 Use the buttons at the top of the gauge view page to specify additional gauge settings.
- 6 To remove changes and start from the default gauge view, click the Clear button.
- 7 Save the report.

## Specifying General Gauge Background Properties in Gauge View

You can set general properties for the background on which the gauge appears, such as whether to display a title and whether a legend appears with each gauge. You can also specify a background color, a color for the title, whether to show a border around the background, the number of gauges to show per row, and the space between them.

### *To set general background properties for a gauge view*

- 1 Click the gauge canvas properties button at the top of the gauge view page.

The Gauge Canvas Properties dialog box appears.
- 2 Make your selection for a title:
  - To show the name of the measure, click Auto.
  - To show a different title, click Custom and type the title text.
  - If you do not want a title to appear on the background, click None.
- 3 For the legend, make a selection from the drop-down list.

The default location for the legend is below the title.

  - To suppress the display of the legend, select None.
- 4 To set a background color for the area on which the gauge appears, click the background color button and make a selection.
- 5 To show the title in a color, click the text color button and make a selection.
- 6 To show a border along the edges of the background, click the border color button and make a selection.
- 7 Specify the number of gauges to appear per row, and the space between them.

The space between gauges is measured in pixels.

- 8 Click OK.

The gauge view refreshes. The view may resize to accommodate your selections.

### Adding Titles and Footers in Gauge View

You can specify a title, a subtitle, a footer, and a secondary footer for the gauge. If the background holds multiple gauges, titles and footers appear for each gauge. Titles and footers are optional.

#### *To add titles and footers in a gauge view*

- 1 Click the gauge titles button at the top of the gauge view page.

The Gauge Titles dialog box appears.

- 2 Type the text to use and click OK.

*NOTE:* As with the Narrative view, you can use @n to include the results from the designated column in the gauge titles. For example, @1 inserts the results from the first column, and @3 inserts the results from the third column. For more information, see [Adding Narrative Text to Results](#) (on page 445).

The gauge view refreshes.

### Adding Gauge Ranges in Gauge View

Gauge ranges identify the minimum and maximum values for each range and include a color in which the range will appear in the gauge, such as green for acceptable, yellow for warning, and red for critical.

You can set gauge ranges to a static value, the column name of the measure, or as the result of an SQL query.

#### *To set gauge ranges in a gauge view*

- 1 Click the gauge ranges button at the top of the gauge view page.

The Gauge Ranges dialog box appears.

- 2 To add the first range, click the Add button.

- a Type a caption for the range.
- b To set the minimum and maximum gauge ranges, click the properties button and make a selection from the Advanced Options dialog box.
- c To specify the color for the range, click the color button and make a selection.

**3** Click OK.

The gauge view refreshes.

## Specifying Additional Properties for a Gauge in Gauge View

Additional gauge properties include control over the appearance of elements within the gauge, setting properties for scale items such as gauge limits and tick marks, and specifying the interaction to occur when a user clicks the gauge. These properties are set in the Additional Gauge Properties dialog box.

Choices for the appearance of a gauge appear on the Appearance tab and include the following items:

- Whether data labels appear.  
Data labels can always appear, appear only when a user pauses the mouse over elements in the gauge, or never appear.
- Selections for a background color for the gauge, the color of text within the gauge, and a border around the gauge.
- The height and width of the gauge, in pixels.

Choices for scale properties appear on the Scale tab and include the following items:

- Default or custom gauge limits.
- The number of major and minor tick marks.

Choices for the user interaction with the gauge appear on the Interaction tab and include the following actions:

- **Navigate.** Allows the user to navigate to another saved report or dashboard.
- **None.** Disables navigation from the gauge.

You can also set advanced properties for the Bar gauge type by clicking the icon.

### *To specify additional properties in gauge view*

- 1** Click the additional gauge properties button at the top of the gauge view page.  
The Additional Gauge Properties dialog box appears.
- 2** Make your selections from the Appearance, Scale, and Interaction tabs.
- 3** Click OK.  
The gauge view refreshes.

### Setting Advanced Properties for the Dial in a Dial Gauge

Advanced properties allow you to specify whether scale labels should appear and what value they should show, set the dial arc length, and select the thickness of the dial.

The following choices are available for the display of scale labels:

- Percentage of total
- Actual value

The dial arc length is expressed in degrees. For example, specifying 360 results in a dial gauge that is a complete circle.

The dial thickness is expressed in pixels. As you specify larger values, the gauge becomes thicker, and the inner perimeter of the dial becomes smaller. Specifying extremely large values relative to the dial size may cause the gauge to become distorted and is not recommended.

#### *To specify advanced properties for the dial in a dial gauge*

- 1 Click the advanced options button at the top of the gauge view.  
The Dial Specific Properties dialog box appears.
- 2 Make your selection for how the scale labels should appear.  
To suppress the display of scale labels, select None.
- 3 To set the dial arc length and dial thickness, click the option to specify them manually and enter values.
- 4 Click OK.  
The gauge view refreshes.

### Showing Filters Applied to Results

Use the filters view to show the filters in effect for a report. For information about adding filters to a report, see [Adding Filters to Columns](#) (on page 379).

#### *To add or modify a Filters view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new Filters view, navigate to the Create Layout page, click the Add View button and select Active Filters from the views drop-down list.
  - To edit an existing Filters view, navigate to the Create Layout page, find the Filters view, and then click the Edit View button for the Filters view.

The workspace shows the Filters view.

- 2 When you are done, you can save the report with the Filters view.

## Adding Markup Text to Results

Use the Static Text view to add or edit markup text to appear with the results. You can add markup text that contains formatted text, ActiveX controls or JavaScript, sound bites, animation, specialized logos, and so on. The markup text may contain anything that is supported by your browser.

This section provides the procedure to add or modify a Static Text view and some examples of static text. If you find an example that is similar to what you want to do, you can copy it and tailor it to your needs.

### *To add or modify a Static Text view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new Static Text view, navigate to the Create Layout page, click the Add View button, and select Static Text from the views drop-down list.
  - To edit an existing Static Text view, navigate to the Create Layout page, find the Static Text view, and then click the Edit View button for the Static Text view.

The workspace shows the Static Text view.

- 2 Enter the markup text into the text box.

To make text appear bold, in italics, or underlined, click the appropriate button to insert the beginning and ending HTML tags, and then type the text between the tags, or select the text first and then the formatting button.

**NOTE:** To include a line break, use the Line Break button. Pressing Enter does not result in multiple lines of text.

The following table describes several examples.

Static Text View Example	Description and Usage Notes
HTML text	<p>Paste or type the HTML (or appropriate formatted text) into the text box. You can also click the HTML tag buttons. Based on the format of the text you are entering, markup tags may be used to control the format of the text. The following are some examples of what you can do:</p> <ul style="list-style-type: none"> <li>■ To set font size and color:               <pre>&lt;FONT SIZE="4" COLOR="red"&gt;Red Text&lt;/FONT&gt;</pre> </li> <li>■ To combine tags for additional effects:               <pre>&lt;B&gt;&lt;FONT COLOR="red"&gt;Bold Red Text&lt;/FONT&gt;&lt;/B&gt;</pre> </li> </ul>

Static Text View Example	Description and Usage Notes
ActiveX object	The Active-X object must be self-contained and supported by your browser. Paste or type the object into the HTML Text window, making sure to include the beginning and ending tags <object...> and </object>.
JavaScript or VBScript	The script must be self-contained and supported by your browser. Paste or enter the script into the text box, making sure to include the beginning and ending tags <script> and </script>.
Audio	<p>Make sure you know where the audio clip is located. If the audio clip is for use in a shared environment, it must be located on a network drive accessible to all users.</p> <p>Use the HTML tag &lt;EMBED&gt; to add audio, in the following format:</p> <pre>&lt;EMBED SRC="audio" AUTOSTART="true" LOOP="true" HIDDEN="true"&gt;&lt;/EMBED&gt;</pre> <p>where <i>audio</i> is the location and name of the audio clip.</p> <p>To add an audio clip located on your hard drive, the following HTML is an example:</p> <pre>&lt;EMBED SRC="c:\mycomputer\MIDIfiles\wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"&gt;&lt;/EMBED&gt;</pre> <p>To add the same audio clip from a shared location on your Web server, the following HTML is an example:</p> <pre>&lt;EMBED SRC="http://ourwebserver.company.com/sounds/wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"&gt;&lt;/EMBED&gt;</pre>
Background image	<p>The following example uses JavaScript.</p> <p>Make sure you know where the image to use as the background is located. If the image is for use in a shared environment, it must be located on a network drive or Web site accessible to all users.</p> <p>If the image is located in a shared dashboard files folder, the following is example HTML:</p> <pre>&lt;script language="javascript"&gt; document.body.background = "http://ourwebserver.company.com/graphics/"NameOfGraphic"; &lt;/script&gt;</pre> <p>where <i>NameOfGraphic</i> is the name of the file to use, such as bricks.gif or sand.jpg.</p>

- 3 To apply cosmetic formatting to the font used in the static text view, click the format view button.



- 4 To import the font formatting from a previously saved view, click the import formatting button and navigate to the saved view.
- 5 Save the report.

## Adding Legends to Reports Using Legend View

Use the Legend view to document the meaning of special formatting used in a report, such as the meaning of custom colors applied to gauges.

For example, you may use conditional formatting in a report to show critical items in the color red and items that need attention in the color yellow. You can add a legend with text that documents the meaning of the colors and captions that summarize the appropriate action. You can use cosmetic formatting to make the background colors of the text match the colors in the conditional report.

### *To add or modify a legend view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then do one of the following:
  - To add a new legend view, click Step 2 - Create Layout, and then select Legend from the views drop-down list.
  - To edit an existing legend view, click Step 2 - Create Layout, and then click the Edit View button for the legend view.

The workspace shows the legend view.

- 2 Make your selections for where to show captions (descriptive text) and how many legend items you want per row.
- 3 (Optional) Type a title for the legend, such as Legend.
- 4 In the first Caption text box, type the meaning of the condition, such as Requires Immediate Attention.
- 5 In the first Sample Text text box, type the first condition you want to document, such as Critical.

You can use the common formatting dialog box to set the background color, such as red. Entering text is optional. You can just set a background color if desired.
- 6 Continue adding Caption and Sample Text pairs as needed.
- 7 Save the report.

## Allowing Users to Change Columns in Reports

Use the Column Selector view to allow users to dynamically change which columns appear in a report. One column selector can be attached to each column in a specific report, and multiple columns (attributes) can be attached to each column selector.

### *To add or modify a Column Selector view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new Column Selector view, navigate to the Create Layout page, click the Add View button, and select Advanced > Column Selector from the views drop-down list.
  - To edit an existing Column Selector view, navigate to the Create Layout page, find the view, and then click the Edit View button for the Column Selector view.

The workspace shows the options and settings for the view.

- 2 Select the Enable check box for each column in which you want a column selector to appear.
- 3 Enter a Column Label for each selector and select a Label Position for the label.

**NOTE:** If you do not enter a label, users viewing the results will not see a label on the selector.
- 4 If you want results to be refreshed as soon as a user selects any new choice from a column selector, select the Automatically refresh when a new column is selected check box. If you clear this check box, users will see a Go button next to the column selectors, and must click Go to see the new results.
- 5 Select the Display Results check box to preview the Column Selector view.
- 6 Click OK to return to the Layout Views page. Use the following buttons to move around and position the Column Selector view (and other views, as required) on the page:
  - Move View Right button - select this button to move the Column Selector view across the page to the right.
  - Move View Up or Move View Down button - select this button to move the Column Selector view up or down the page.
  - Format View button - select this button to format the appearance of the Column Selector view. You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding) here.
  - Edit View button - select this button to edit the Column Selector view.
  - Delete View button - select this button to delete the Column Selector view.
- 7 When you are done, you can save the report with the Column Selector view.

## Allowing Users to Select a Specific View Using View Selector View

Use the View Selector view to select a specific view of the results from among the saved views. When placed on a report, the View Selector appears as a drop-down list for users to select the specific result view they want to see.

### *To add or modify a View Selector view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:

- To add a new View Selector view, navigate to the Create Layout page, click the Add View button and select Advanced > View Selector from the Views drop-down list.
- To edit an existing view selector view, navigate to the Create Layout page, find the View Selector view, and then click the Edit View button for the view selector view.

The workspace shows the View Selector view.

- 2 (Optional) Type a caption for the View Selector and indicate where the caption should appear relative to the View Selector.

- 3 Make your selections for view choices to include in the View Selector.

Select views from the Available Views box and move to the Views Included box.

In the Views Included box, click the Rename button to rename a selected view.

**NOTE:** The None view shows the selector only.

- 4 Select the Display Results check box to preview the View Selector view.

- 5 Click OK to return to the Layout Views page. Use the following buttons to move around and position the View Selector view (and other views, as required) on the page:

- Move View Right button - select this button to move the View Selector view across the page to the right.
- Move View Up or Move View Down button - select this button to move the View Selector view up or down the page.
- Format View button - select this button to format the appearance of the View Selector view. You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding) here.
- Edit View button - select this button to edit the View Selector view.
- Delete View button - select this button to delete the View Selector view.

- 6 When you are done, you can Save the report with the View Selector view.

## Showing Results in Funnel Charts

Use the Funnel Chart view to show results as a three-dimensional chart that represents target and actual values and levels by color. Typically, funnel charts are used to graphically represent data related to stages in a process, such as the amount of potential revenue shown for each sales stage.

Funnel charts are well suited for showing actual compared to targets for data where the target is known to decrease (or increase) significantly per stage, such as a sales pipeline. You can click on one of the colored areas to drill down to more detailed information.

In funnel charts, the thresholds indicate a percentage of the target value, and colors provide visual information for each stage:

- All stages for which the actual value falls below the minimum threshold are colored in red.
- All stages for which the actual value falls below the maximum threshold are colored in yellow.
- All stages for which the actual value is greater than the maximum threshold are colored in green

### *To add or modify a Funnel Chart view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new Funnel Chart view, navigate to the Create Layout page, click the Add View button, and select Advanced > Funnel Chart from the views drop-down list.
  - To edit an existing Funnel Chart view, navigate to the Create Layout page, find the Funnel Chart view, and then click the Edit View button for the Funnel Chart view.

The workspace shows the options and settings for the Funnel Chart view.

- 2 Make your selections for the fields in the workspace.

The following table describes the fields.

Funnel Chart View Workspace Field	Description
Chart Title	Specifies the title to display at the top of the chart.
Stage	Identifies the stage to represent, from the drop-down list. These values are shown on the horizontal axis.
Actual Value	Specifies the actual value for the stage, a column selected from the drop-down list.
Target Value	Specifies the target value for the stage, a column selected from the drop-down list.
Target value for final stage only	Indicates whether the target value should appear for each stage or for the final stage only.

Funnel Chart View Workspace Field	Description
Factor required to meet target	Identifies the factors required to meet targets.
Minimum Threshold	Specifies the minimum threshold. Values below this percentage will appear in red. Values between this percentage and the Maximum Threshold will appear in yellow.
Maximum Threshold	Specifies the maximum threshold. Values above this percentage will appear in green.
Size	Specifies the size.
Force standard shape and equal stage widths	Indicates whether Siebel CRM On Demand Answers will automatically force the display.
Interaction	Indicates the level of interaction allowed in the chart. Choices include None, Drill, and Navigate.

- 3 Select the Display Results check box to preview the Funnel Chart view.
- 4 Click OK to return to the Layout Views page. Use the following buttons to move around and position the Funnel Chart view (and other views, as required) on the page:
  - Move View Right button - select this button to move the Funnel Chart view across the page to the right.
  - Move View Up or Move View Down button - select this button to move the Funnel Chart view up or down the page.
  - Format View button - select this button to format the appearance of the Funnel Chart view. You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding) here.
  - Edit View button - select this button to edit the Funnel Chart view.
  - Delete View button - select this button to delete the Funnel Chart view.
- 5 When you are done, you can save the report with the Funnel Chart view.

## Adding Narrative Text to Results

Use the narrative view to add one or more paragraphs of text to appear with the reports. Narrative text is useful for providing information such as context, explanatory text, or extended descriptions. You can perform the following actions in the narrative view:

- Type a sentence with placeholders for each column in the results.
- Specify how rows should be separated.

- Use formatting buttons to make text bold, italic, or underlined, and insert line breaks.
- Apply cosmetic formatting to the fonts used in the narrative view, or import the font formatting from a previously saved view.

### Example Usage Scenario for Narrative Text View

A user creates a report that returns the region name in the second column as part of the result set. The user wants the narrative view to appear as shown in the following example, with introductory text and each region listed on a new line:

**This report shows your sales by region. The regions are:**

East Region

West Region

The following table lists and describes the user's narrative view entries:

Field	Entry	Explanation
Prefix	[b] This report shows your sales by region. The regions are: [/b][br][br]	<p>The entry prefixes the narrative with text. The text is formatted to appear in bolded type and is followed by two line breaks.</p> <p>The user positions the cursor into the Prefix text box and clicks the bold text button (<b>B</b>) to insert the tags to begin and end bolded text. The user types the following text between the tags:</p> <p>This report shows your sales by region. The regions are:</p> <p>The user then clicks the Line Break button twice.</p>
Narrative	@2	<p>The entry includes the results from the second column (the region name) in the narrative text.</p> <p>The user positions the cursor into the Narrative text box and types the characters @2.</p>
Row Separator	[br]	<p>The entry starts each row of the narrative text on a new line.</p> <p>The user positions the cursor into the Row Separator text box and clicks the Line Break button twice.</p>
Postfix	[br][b] End of Sales by Region report[/b]	The entry appends text to the narrative, in the same manner as the Prefix.

## Reserved Characters in the Narrative View

In the narrative view, the following characters are reserved characters:

- @ (at sign, unless used as a column placeholder in the Narrative text box)
- [ (left bracket)
- ] (right bracket)
- ' (single quote)
- \ (back slash)

**NOTE:** If you want to include a reserved character, precede it with a backward slash character (\) to escape it. For example, to include a backward slash character in narrative text, type \\.

## Adding or Modifying Narrative Views

The following procedure provides the steps to construct a narrative view.

In the Prefix, Narrative, and Postfix text boxes, you can use the formatting buttons to make text appear in bold, italic or underlined type.

**NOTE:** To include a line break, use the Line Break button. Pressing Enter does not result in multiple lines of text.

### *To add or modify a narrative view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new narrative view, navigate to the Create Layout page, click the Add View button, and select Advanced>Narrative from the views drop-down list.
  - To edit an existing narrative view, navigate to the Create Layout page, find the Narrative View, and then click the Edit View button for the narrative view.

The workspace shows the options and settings for the Narrative view.

- 2 Enter your selections for the fields in the workspace.

The following table describes the fields.

Narrative View Workspace Field	Comments
Prefix	Specifies the header for the narrative. This text appears at the beginning of the narrative.
Narrative	Indicates the narrative text that will appear for each row in the results. Use @n to include the results from the designated column in the narrative. For example, @1 inserts the results from the first column in the narrative, and @3 inserts the results of the third column.

Narrative View Workspace Field	Comments
Row separator	Specifies a row separator tag. To use a separator other than the default for the format, enter the desired row separator in the Row Separator text box.
Postfix	Specifies the footer for the narrative. The text appears at the end of the narrative.

- 3 To apply cosmetic formatting to the font used in the narrative view, click the Format View button.
- 4 To import the font formatting from a previously saved view, click the Import Formatting from another view button and navigate to the saved view.
- 5 Select the Display Results check box to preview the Narrative view.
- 6 Click OK to return to the Layout Views page. Use the following buttons to move around and position the Narrative view (and other views, as required) on the page:
  - Move View Right button - select this button to move the Narrative view across the page to the right.
  - Move View Up or Move View Down button - select this button to move the Narrative view up or down the page.
  - Format View button - select this button to format the appearance of the Narrative view. You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding) here.
  - Edit View button - select this button to edit the Narrative view.
  - Delete View button - select this button to delete the Narrative view.
- 7 When you are done, you can Save the report with the Narrative view.

## Showing Results in Scrolling Tickers

A ticker displays the results of a report as a marquee (moving results that scroll across the page). You can customize the size of the scroll area, the speed and direction in which the results scroll, and other display settings.

**NOTE:** If your Web browser does not support moving text, the results will appear, but they will not scroll across the page.



*To add or modify a Ticker view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:

- To add a new Ticker view, navigate to the Create Layout page, click the Add View button, and select Advanced > Ticker from the views drop-down list.
- To edit an existing Ticker view, navigate to the Create Layout page, find the Ticker view, and then click the Edit View button for the Ticker view.

The workspace shows the options and settings for the Ticker view.

- 2 To generate default settings for the most commonly used fields, click the Set Defaults button.

**CAUTION:** If you click the Set Defaults button after entering values in other fields, your entered values are cleared.

- 3 To clear all fields, click the Clear Fields button.

**NOTE:** After you clear all fields, you can click the Set Default button to restore default settings for the most commonly used fields.

- 4 Make your selections for the fields in the workspace.

The following table describes the fields.

Ticker View Workspace Field	Description
Behavior	<p>Specifies how the results move in the ticker:</p> <p><b>Scroll.</b> The results start hidden, scroll on to the page, then off the page before repeating.</p> <p><b>Slide.</b> The results start hidden, scroll on to the page, then stop once touching the other side.</p> <p><b>Alternate.</b> The results bounce back and forward inside the marquee.</p>
Direction	<p>Specifies the direction the results move in the ticker (Left, Right, Down, or Up).</p>
Width	<p>Specifies the width of the ticker, either in pixels, or as a percentage of the page width.</p> <p>For example, a value of 200 indicates a width of 200 pixels, and a value of 25% indicates a width of one-quarter of the page.</p>

Ticker View Workspace Field	Description
Height	<p>Specifies the height of the ticker, either in pixels, or as a percentage of the page height.</p> <p>For example, a value of 200 indicates a height of 200 pixels, and a value of 25% indicates a height of one-quarter of the page.</p>
Beginning Text	<p>Specifies any optional text or graphics to display at the beginning of each redraw of the results. You can use HTML to format the text.</p> <p>If you include an image, make sure you know where the image is located. If the image is for your use only, the following is a sample location:</p> <p>c:\mycomputer\temp\report.gif</p> <p>If the image is for use in a shared environment or web site, it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:</p> <p>\\ALLUSERS\graphics\report.gif</p>
Row Format	<p>Specifies the HTML to use in formatting the rows in the results.</p> <p>To include the results from a designated column, use @n. For example, @1 inserts the results from the first column, and @3 inserts the results of the third column.</p>
Row Separator	<p>Specifies the character that separates one row from another..</p>
Column Separator	<p>Specifies the character that separates one column from another. This is used when Row Format is blank, which results in all columns being displayed.</p>
Ending Text	<p>Specifies any optional text or graphics to display at the end of each redraw of the results. You can use HTML to format the text.</p> <p>If you include an image, make sure you know where the image is located. If the image is for your use only, the following is a sample location:</p> <p>c:\mycomputer\temp\report.gif</p> <p>If the image is for use in a shared environment or web site, it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:</p> <p>\\ALLUSERS\graphics\report.gif</p>

**NOTE:** Several of these fields are pre-populated with HTML that provides initial formatting. Take care when editing this text, so that the original HTML is still valid. If

you remove the HTML from one of the fields, you should remove it from the others, too, otherwise the ticker will not function correctly.

- 5 To specify additional options, perform the following actions:

- a Click the Advanced button.

The Advanced Ticker Options dialog box appears.

- b Make your selections for the advanced options and click OK.

The following table describes the advanced options.

Advanced Options in the Ticker View Workspace	Description
# of Loops	Specifies the number of times that the results will scroll. The default is an infinite number of times.  You must specify a whole number.
Scroll Amount	Sets the number of pixels between successive redraws of the results. Larger values cause faster, less smooth scrolling.
Scroll Delay	Specifies the number of milliseconds between successive redraws of the results. Large values cause slower scrolling.
Background Color	Specifies the color to use for the background. Depending on what your browser supports, you can enter a color name such as yellow or blue, or use the 6-digit hexadecimal format, such as #AFEEEE for pale turquoise. (You can omit the number sign character from the hexadecimal format.)
Additional Marquee Attributes	Specifies other marquee options that your browser may support, such as ALIGN="top   middle   bottom" to align the ticker to the top, middle or bottom of the text around it. You can also add HTML to further customize the look of the ticker.

- 6 Select the Display Results check box to preview the Ticker view.
- 7 Click OK to return to the Layout Views page. Use the following buttons to move around and position the Ticker view (and other views, as required) on the page:
- Move View Right button - select this button to move the Ticker view across the page to the right.
  - Move View Up or Move View Down button - select this button to move the Ticker view up or down the page.
  - Format View button - select this button to format the appearance of the Ticker view. You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding) here.
  - Edit View button - select this button to edit the Ticker view.
  - Delete View button - select this button to delete the Ticker view.
- 8 When you are done, you can save the report with the Ticker view.

# Alerting Users to No Data

Use the No Results view to specify explanatory text to appear if the report does not return any results. The text can help users understand that there was no data.

### *To add or modify a No Results view*

- 1 In Siebel CRM On Demand Answers, create or modify the report with which you want to work, and then perform one of the following actions:
  - To add a new No Results view, navigate to the Create Layout page, click the Add View button and select Advanced > No Results from the views drop-down list.
  - To edit an existing No Results view, navigate to the Create Layout page, find the No Results view, and then click the Edit View button for the No Results view.

The workspace shows the No Results view.

- 2 Enter explanatory text into the Headline and Text boxes.
- 3 Select the Display Results check box to preview the No Results view.
- 4 Click OK to return to the Layout Views page. Use the following buttons to move around and position the No Results view (and other views, as required) on the page:
  - Move View Right button - select this button to move the No Results view across the page to the right.
  - Move View Up or Move View Down button - select this button to move the No Results view up or down the page.
  - Format View button - select this button to format the appearance of the No Results view. You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding) here.
  - Edit View button - select this button to edit the No Results view.
  - Delete View button - select this button to delete the No Results view.
- 5 When you are done, you can save the report with the No Results view.

## Step 3: Defining Prompts (Optional)

To allow Siebel CRM On Demand Answers users the option to specify a filter value when they run a report, define a runtime prompt for the report. Runtime prompts are useful because reports may need to be filtered differently based upon different users or the dates that reports are run.

A runtime prompt differs from a prebuilt filter in that a filter is set up when the report is defined and cannot be changed without revising the report itself. For example, if you define a prompt on Account Type for the report, your employees are prompted to select which Account

Type value to see when they run the report. If you define the prebuilt filter as a specific Account Type, such as Competitor, the filter is hard-coded and cannot be altered by the user at runtime.

Prompts can be created in Siebel CRM On Demand Answers from the Define Prompts page. There are two types of prompts that you can create:

■ **Column filter prompt**

A column filter prompt provides general filtering of a column within a report. A column filter prompt can present all choices for a column, or, it can present constrained choices for a column. For example, if a report contains a Region=East filter, constraining choices for the City column restricts the selections to cities in the East region only. This eliminates the selection of a mutually exclusive filter that could result in no data.

■ **Image prompt**

An image prompt provides an image that users click to select criteria for a report. For example, in a sales organization, users can click their territories from an image of a map to see sales information, or click a product image to see sales information about that product. Users who know how to use the HTML <map> tag can create an image map definition.

**NOTE:** Within the Build and View Analysis window, prompts display only after clicking the Preview Analysis button. Prompts do not display in [Step 4: Reviewing Reports](#) (on page 457) until the Preview Analysis button is clicked in that step. Prompts will display when reports are run from the Public Analyses section of the Reports Homepage.

### Related Topics

Adding Column Filter Prompts 453

Adding Image Prompts 455

## Adding Column Filter Prompts

A column filter prompt allows users to select values to filter a column in a report. You can define the range of possible filter values and how the user selects the filter values for the report.

Column filter prompts appear on the Define Prompts page. When you have multiple column filter prompts constructed for a report, they are presented to the user one at a time, in the order they are listed, from top to bottom.

### *To add or modify a column filter prompt*

- 1 In Siebel CRM On Demand Answers, select a report to which you want to add a column filter prompt, and then navigate to the Define Prompts page.

- 2 From the Create Prompt drop-down list, select Column Filter Prompt.  
The Prompt Properties dialog box appears.
- 3 Enter a caption for the column filter prompt in the Caption box.  
The caption will appear to the user.
- 4 Enter a description in the Description box (optional).
- 5 From the Filter on Column drop-down list, select the column in the report that you want to filter, and then, from the Operator drop-down list, select the operator to use.  
If you want the user to select the operator, select the operator \*Prompt User.
- 6 Specify how the user should select values by clicking the appropriate option.  
Users can select values from a drop-down list, or browse through choices and enter them into a text box.  
**NOTE:** A maximum of 1000 values are permitted if selected from a drop-down list.
- 7 To allow the user to select only one value for the column filter prompt, select the Single Value Only check box.
- 8 Under the What values should be shown to the user item, select one of these options:
  - To show no values, click None.  
The user will need to enter the value.
  - To show all possible values, click All Values.
  - To show a subset of values, click Filter Limited Values.  
  
Limiting values is useful when prompting for multiple columns, or when the results already contain a filter. It prevents a user from choosing values that would result in no data. For example, suppose a report contains a country column and a city column, and already contains the filter Country=France. By selecting limited values for the city column filter, the choices are constrained to cities in France only, which prevents the possibility of choosing mutually exclusive filters, such as Country=Italy and City=Paris. Limiting values may require more time to process the prompt compared to the two other options.
- 9 Make selections for the options in the Other options area:
  - To allow the user to constrain the filter choices, select the Allow user to constrain choices check box. If this checkbox is selected, the users are presented with a picklist where they can use conditions (such as begins with, ends with, and contains) to constrain the choices.  
  
Constrained choices help the user locate the values to use as a filter. For example, if a filter contains all the cities in France, a user can constrain the filter choices to those cities starting with P.

- To allow a user to skip this column filter, select the Allow user to skip prompt check box.

This causes a Skip Prompt option to appear. The user can then click this option to bypass making a selection for this filter.

**10** When you are finished, click OK.

The column filter prompt is shown on the Define Prompts page.

**11** To view the column filter prompt, click the Preview Analysis button.

#### *To modify the properties of a column filter prompt*

- 1 Click the edit button to open the Prompt Properties dialog box.
- 2 Make your changes, and then click OK.

#### *To move a column filter prompt up or down in the execution order*

- Click the Move Up and Move Down buttons.

These buttons appear only when more than one prompt is shown in the Prompts area.

#### *To delete a column filter prompt*

- Click the delete button.

## Adding Image Prompts

An image prompt provides an image that users click to select their report criteria. For example, from an image that shows products, users can click a product. The selected product is then used to filter the underlying report. To create an image prompt, you need to know how to use the HTML <map> tag to create an image map definition.

Image prompts appear on the Define Prompts page in Siebel CRM On Demand Answers. When you have multiple image prompts constructed for a report, they are executed in the order they are listed, from top to bottom.

#### *To add or modify an image prompt*

- 1 In Siebel CRM On Demand Answers, display a report to which you want to add an image prompt, and then navigate to the Define Prompts page.
- 2 From the Create Prompt drop-down list, select Image Prompt.

The Image Map Prompt Properties dialog box appears.

- 3 Enter a caption for the image prompt in the Caption box.

The caption will appear to the user. You can include HTML markup tags in the caption, such as `<b>`, `<center>`, `<font>`, and `<table>`.

- 4 Enter a description in the Description box (optional).

- 5 Enter the location and name of the image in the Image URL box.

If the image prompt is for your use only, you can specify a location that only you can access, such as `c:\mycomputer\temp\map.gif`. For an image prompt that will be available to other users, specify the Universal Naming Convention (UNC) name, such as `\\ALLUSERS\graphics\map.gif`, or a web site accessible to all your users, such as `http://mycompany.com/imagemap.gif`.

- 6 Enter the appropriate HTML `<map>` tags and data in the HTML box.

An HTML `<map>` statement with `<area>` elements is required. Each `<area>` element must specify `shape=` and `coords=` attributes. The `alt=` attribute, if specified, will be mapped to the Area title. For example:

```
<map>
  <area al t="Top-left" shape="rect" coords="0, 0, 50, 50">
  <area al t="Top-right" shape="rect" coords="50, 0, 100, 50">
  <area al t="Bottom" shape="rect" coords="0, 50, 100, 100">
</map>
```

- 7 To extract the image map information from the HTML, click the link Extract Image Map from HTML.

The Image Map Prompt Properties dialog box expands to show the area titles, shapes, and coordinates entered in the HTML box.

- You can change the values in the area title if you want. This text appears when a user moves the pointer over the image area.
- For each area, in the Column box, enter the name of the column to pass when a user clicks it, and the value to use.

**NOTE:** The column needs to be a fully qualified column name, in the format *Table.Column Name*.

- Place double quotes around any column names containing spaces. For example:

- Account."Account Country"
- "Units shipped"

- 8 When you are finished, click OK.

The image prompt is shown on the Define Prompts page.



- 9 To view the image prompt, click the Preview Analysis button.

When you click an area of the image, the underlying filter constructed for that area displays. You can click the Refresh link to see the results. You can change the filter criteria and then click the Refresh link again to see the change reflected in the results.

#### *To modify the properties of an image prompt*

- 1 Click the Properties link to open the Image Map Prompt Properties dialog box.
- 2 Make your changes, and then click OK.

**NOTE:** Prompts display only after clicking the Preview Analysis button. Prompts do not display in [Step 4: Reviewing Reports](#) (on page 457), until the Preview Analysis button is clicked in that step.

## Step 4: Reviewing Reports

Before you finalize your report, review it. After reviewing it, click the Preview Analysis button to view the final version of the report in a pop-up window.

**NOTE:** You must click Preview Analysis for any Prompts to display if they have been built into the report.

From within Review, you have the option to print or download the report.

### Related Topics

Making Custom Reports Public 457

Finishing Your Analysis 458

## Making Custom Reports Public

Before making a report available to all employees, verify its content and format by running a test and getting approval by the person who requested the report. The reviewer should check for the following:

- Report includes all necessary columns.
- Columns are sorted correctly.
- Filters are limiting the data correctly.
- Charts present the data in a useful way.

You can release the reports you created so that all employees at your company can use them. Those reports appear in the Public Analyses section on their Reports Homepage.

### *To make your report public*

- 1 On the Reports Homepage, click Design Analyses.
- 2 From Siebel CRM On Demand Answers, select your report using the Open Analysis button.
- 3 Click Save.
- 4 Select either Shared Folders or any subfolder you want to save it to.
- 5 Click OK to save the report.

This releases the report so that other employees at your company, who have visibility to the folder where you saved it, can access the report. Your private report in My Folders is still saved in case you want to run it or revise it for ad hoc analyses.

## Finishing Your Analysis

Finish your analysis and save it.

### *To finish your analysis (includes saving your custom report)*

- 1 Above the title bar, click the Finish button.
- 2 Select the folder where you want to save the report.  
**TIP:** Save the report as a private one first using My Folders. After checking the setup, you can save it to public Shared Folders if you want to allow others to use it, and then delete it from My Folder. Reports saved in Shared Folders are accessed from the Shared Custom Analyses link within the Custom Reports and Analyses section on the Reports Homepage, and are visible to all employees who have access to the folder where you saved the report.
- 3 Enter a name for your report.  
**TIP:** Use a consistent naming convention that all users will recognize. Also, avoid using extra blank spaces or symbols, such as apostrophes, when naming reports.
- 4 Enter a short description of the report. The information you enter for both the name and description appears on the employees' Reports Homepage exactly as you enter it.  
**TIP:** Use the description to let users know if the report contains historical or real-time data.
- 5 Click OK. This will save the report, close the Build and View Analysis window, and navigate you back to the Getting Started With Answers page.

Your custom report is saved and appears in the folder you specified. It can be accessed later within Siebel CRM On Demand Answers by using the Open Analysis button.

## Using Functions in Analyses

SQL functions perform various calculations on column values. This section explains the syntax for the functions supported by Siebel CRM On Demand Answers. It also explains how to express literals. There are aggregate, string, math, calendar date/time, conversion, and system functions.

You can use functions anywhere that formulas or SQL expressions are allowed within Siebel CRM On Demand Answers. For example:

- **Column Formulas:** In Step 1 (Define Criteria), click Edit Formula [fx] for a column, and then click the Column Formula tab. You can use functions in the Column Formula text box.
- **Filters:** In Step 1 (Define Criteria), click New Filter for a column, and then select SQL Expression from the Add list. You can use functions in the Expression text box. From this dialog box you can also select Convert this filter to SQL from the Advanced list and functions can be used in the resulting Advanced SQL Filter dialog box.
- **Filter Column Formulas:** In Step 1 (Define Criteria), create a filter. Then, click Filter Options and select Edit Column Formula from the list. You can use functions in the Column Formula text box. These functions apply only to the filter.
- **Bins:** From the Edit Column Formula dialog box, click the Bins tab, and then select SQL Expression from the Add list. You can use functions in the Expression text box.

### Formula Names

When referring to a column in a function, you must use its internal formula name. All columns have two different names.

- The *display name* of the column is the name that you see displayed in the Action bar on the left side of the page, under a specific folder name. These names are used as the default labels for column headings. The names change depending on the language setting of the user, as well as any field name changes made by your company's On Demand administrator.
- The *formula name* is a fixed, internal name for each column. These names are always in English. Formula names contain two parts that are separated by a period. The first part corresponds to the folder name, and the second part corresponds to the column. If there are any spaces in either the folder name or the column name, then that part must be enclosed in double quotes. The folder name part of the formula name is often the same as the displayed folder name, but not always.

The following table provides examples of formula names that correspond to specific folder and display names for a column.

Folder Name	Display Name	Formula Name
Account	Main Phone #	Account."Phone Number"
Account	Annual Revenues	Account."Annual Revenue"
Date Created	Fiscal Qtr/Yr	"Date Created"."Fiscal Quarter/Yr"

Folder Name	Display Name	Formula Name
Owned By User	User ID	Employee."Employee ID"

### Finding the Formula Name

To determine the formula name for a column, first add the column to a report. Click Edit Formula [fx], and then the Column Formula tab in the resulting dialog box. The formula name for that column can be found in the Column Formula text box.

**TIP:** When the cursor is in the Column Formula dialog box, clicking a column in the Action bar inserts the column's formula name directly into the text box at the cursor location (but the column is not added to the list of columns for the report). This shortcut works only for the Column Formula dialog box, not for other dialog boxes where SQL can be entered.

## Aggregate Functions

Aggregate functions perform work on multiple values to create summary results. The aggregate functions cannot be used to form nested aggregation in expressions on columns that have a default aggregation rule predefined by Siebel CRM On Demand Answers.

### Avg

Calculates the average (mean) value of an expression in a result set. Has to take a numeric expression as its argument.

Syntax:

AVG (n\_expression)

where:

*n\_expression* Any expression that evaluates to a numerical value.

### AvgDistinct

Calculates the average (mean) of all distinct values of an expression. Has to take a numeric expression as its argument.

Syntax:

AVG (DISTINCT n\_expression)

where:

*n\_expression* Any expression that evaluates to a numerical value.

## BottomN

Ranks the lowest *n* values of the expression argument from 1 to *n*, 1 corresponding to the lowest numerical value. The BOTTOMN function operates on the values returned in the result set.

Syntax:

```
BOTTOMN (n_expression, n)
```

where:

*n\_expression*      Any expression that evaluates to a numerical value.

*n*                      Any positive integer. Represents the bottom number of rankings displayed in the result set, 1 being the lowest rank.

**NOTE:** A query can contain only one BOTTOMN expression.

## Count

Calculates the number of rows having a nonnull value for the expression. The expression is typically a column name, in which case the number of rows with nonnull values for that column is returned.

Syntax:

```
COUNT (expression)
```

where:

*expression*              Any expression.

## CountDistinct

Adds distinct processing to the COUNT function.

Syntax:

```
COUNT (DISTINCT expression)
```

where:

*expression*              Any expression.

## Count (\*) (CountStar)

Counts the number of rows.

Syntax:

```
COUNT(*)
```

For example, if a table named Facts contained 200,000,000 rows, the following query would return the following results:

```
SELECT COUNT(*) FROM Facts

COUNT(*)

200000000
```

### Mavg

Calculates a moving average (mean) for the last n rows of data, inclusive of the current row.

The average for the first row is equal to the numeric expression for the first row, the average for the second row is calculated by taking the average of the first two rows of data, the average for the third row is calculated by taking the average of the first three rows of data, and so on. When the nth row is reached, the average is calculated based on the last n rows of data.

Syntax:

```
MAVG (numExpr, i nteger)
```

where:

<i>numExpr</i>	Any expression that evaluates to a numerical value.
<i>integer</i>	Any positive integer. Represents the average of the last n rows of data.

### Max

Calculates the maximum value (highest numeric value) of the rows satisfying the numeric expression argument.

Syntax:

```
MAX (expressi on)
```

where:

<i>expression</i>	Any expression.
-------------------	-----------------

### Median

Calculates the median (middle) value of the rows satisfying the numeric expression argument. When there are an even number of rows, the median is the mean of the two middle rows. This function always returns a double.

Syntax:

```
MEDI AN (n_expressi on)
```

where:

<i>n_expression</i>	Any expression that evaluates to a numerical value.
---------------------	---

## Min

Calculates the minimum value (lowest numeric value) of the rows satisfying the numeric expression argument.

Syntax:

`MIN (expression)`

where:

*expression*            Any expression.

## NTile

The NTILE function determines the rank of a value in terms of a user-specified range. It returns integers to represent any range of ranks. In other words, the resulting sorted data set is broken into a number of tiles where there are roughly an equal number of values in each tile.

Syntax:

`NTILE (n_expression, n)`

where:

*n\_expression*            Any expression that evaluates to a numerical value.

*n*                        A positive, nonnull integer that represents the number of tiles.

If the *n\_expression* argument is not NULL, the function returns an integer that represents a rank within the reported range.

NTile with *n*=100 returns what is commonly called the *percentile* (with numbers ranging from 1 to 100, with 100 representing the high end of the sort). This value is different from the results of the Siebel Analytics Server percentile function, which conforms to what is called *percent rank* in SQL 92 and returns values from 0 to 1.

## Percentile

Calculates a percent rank for each value satisfying the numeric expression argument. The percent rank ranges are from 0 (1st percentile) to 1 (100th percentile), inclusive.

The PERCENTILE function calculates the percentile based on the values in the result set of the query.

Syntax:

`PERCENTILE (n_expression)`

where:

*n\_expression*            Any expression that evaluates to a numerical value.

### Rank

Calculates the rank for each value satisfying the numeric expression argument. The highest number is assigned a rank of 1, and each successive rank is assigned the next consecutive integer (2, 3, 4,...). If certain values are equal, they are assigned the same rank (for example, 1, 1, 1, 4, 5, 5, 7...).

The RANK function calculates the rank based on the values in the result set of the query.

Syntax:

`RANK (n_expression)`

where:

*n\_expression*      Any expression that evaluates to a numerical value.

### StdDev

The STDDEV function returns the standard deviation for a set of values. The return type is always a double.

Syntax:

`STDDEV([ALL | DISTINCT] n_expression)`

where:

*n\_expression*      Any expression that evaluates to a numerical value.

- If ALL is specified, the standard deviation is calculated for all data in the set.
- If DISTINCT is specified, all duplicates are ignored in the calculation.
- If nothing is specified (the default), all data is considered.

There are two other functions that are related to STDDEV:

`STDDEV_POP([ALL | DISTINCT] n_expression)`

`STDDEV_SAMP([ALL | DISTINCT] n_expression)`

STDDEV and STDDEV\_SAMP are synonyms.

### StdDev\_Pop

Returns the standard deviation for a set of values using the computational formula for population variance and standard deviation.

Syntax:

`StdDev_Pop([ALL | DISTINCT] numExpr)`

where:

*numExpr*      Any expression that evaluates to a numerical value.



- If ALL is specified, the standard deviation is calculated for all data in the set.
- If DISTINCT is specified, all duplicates are ignored in the calculation.

## Sum

Calculates the sum obtained by adding up all values satisfying the numeric expression argument.

Syntax:

`SUM (n_expression)`

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## SumDistinct

Calculates the sum obtained by adding all of the distinct values satisfying the numeric expression argument.

Syntax:

`SUM(DISTINCT n_expression)`

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## TopN

Ranks the highest n values of the expression argument from 1 to n, 1 corresponding to the highest numerical value.

The TOPN function operates on the values returned in the result set.

Syntax:

`TOPN (n_expression, n)`

where:

*n\_expression*      Any expression that evaluates to a numerical value.

*n*      Any positive integer. Represents the top number of rankings displayed in the result set, 1 being the highest rank.

A query can contain only one TOPN expression.

## Running Aggregate Functions

Running aggregate functions are similar to functional aggregates in that they take a set of records as input, but instead of outputting the single aggregate for the entire set of records, they output the aggregate based on records encountered so far.

This section describes the running aggregate functions supported by the Siebel Analytics Server.

### MAVG

Calculates a moving average (mean) for the last *n* rows of data in the result set, inclusive of the current row.

Syntax:

**MAVG** (*n\_expression*, *n*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

*n*                      Any positive integer. Represents the average of the last *n* rows of data.

The average for the first row is equal to the numeric expression for the first row. The average for the second row is calculated by taking the average of the first two rows of data. The average for the third row is calculated by taking the average of the first three rows of data, and so on until you reach the *n*th row, where the average is calculated based on the last *n* rows of data.

### MSUM

This function calculates a moving sum for the last *n* rows of data, inclusive of the current row.

The sum for the first row is equal to the numeric expression for the first row. The sum for the second row is calculated by taking the sum of the first two rows of data. The sum for the third row is calculated by taking the sum of the first three rows of data, and so on. When the *n*th row is reached, the sum is calculated based on the last *n* rows of data.

Syntax:

**MSUM** (*n\_expression*, *n*)

Where:

*n\_expression*      Any expression that evaluates to a numerical value.

*n*                      Any positive integer. Represents the sum of the last *n* rows of data.

Example:

The following example shows a report that uses the MSUM function.

MONTH	REVENUE	3_MO_SUM
JAN	100.00	100.00

FEB	200.00	300.00
MAR	100.00	400.00
APRI L	100.00	400.00
MAY	300.00	500.00
JUNE	400.00	800.00
JULY	500.00	1200.00
AUG	500.00	1400.00
SEPT	500.00	1500.00
OCT	300.00	1300.00
NOV	200.00	1000.00
DEC	100.00	600.00

## RSUM

This function calculates a running sum based on records encountered so far. The sum for the first row is equal to the numeric expression for the first row. The sum for the second row is calculated by taking the sum of the first two rows of data. The sum for the third row is calculated by taking the sum of the first three rows of data, and so on.

Syntax:

RSUM (n\_expressi on)

Where:

*n\_expression* Any expression that evaluates to a numerical value.

Example:

The following example shows a report that uses the RSUM function.

MONTH	REVENUE	RUNNI NG_SUM
JAN	100.00	100.00
FEB	200.00	300.00
MAR	100.00	400.00
APRI L	100.00	500.00
MAY	300.00	800.00
JUNE	400.00	1200.00
JULY	500.00	1700.00
AUG	500.00	2200.00

SEPT	500.00	2700.00
OCT	300.00	3000.00
NOV	200.00	3200.00
DEC	100.00	3300.00

### RCOUNT

This function takes a set of records as input and counts the number of records encountered so far.

Syntax:

RCOUNT (Expr)

Where:

*Expr*                      An expression of any data type.

Example:

The following example shows a report that uses the RCOUNT function.

MONTH	PROFIT	RCOUNT
MAY	300.00	2
JUNE	400.00	3
JULY	500.00	4
AUG	500.00	5
SEPT	500.00	6
OCT	300.00	7

### RMAX

This function takes a set of records as input and shows the maximum value based on records encountered so far. The specified data type must be one that can be ordered.

Syntax:

RMAX (expression)

Where:

*expression*              An expression of any data type. The data type must be one that has an associated sort order.

Example:

The following example shows a report that uses the RMAX function.

MONTH	PROFIT	RMAX
JAN	100.00	100.00
FEB	200.00	200.00
MAR	100.00	200.00
APRIL	100.00	200.00
MAY	300.00	300.00
JUNE	400.00	400.00
JULY	500.00	500.00
AUG	500.00	500.00
SEPT	500.00	500.00
OCT	300.00	500.00
NOV	200.00	500.00
DEC	100.00	500.00

## RMIN

This function takes a set of records as input and shows the minimum value based on records encountered so far. The specified data type must be one that can be ordered.

Syntax:

RMIN (expression)

Where:

*expression*      An expression of any data type. The data type must be one that has an associated sort order.

Example:

The following example shows a report that uses the RMIN function.

MONTH	PROFIT	RMIN
JAN	400.00	400.00
FEB	200.00	200.00
MAR	100.00	100.00
APRIL	100.00	100.00

MAY	300.00	100.00
JUNE	400.00	100.00
JULY	500.00	100.00
AUG	500.00	100.00
SEPT	500.00	100.00
OCT	300.00	100.00
NOV	200.00	100.00
DEC	100.00	100.00

## String Functions

String functions perform various character manipulations, and they operate on character strings.

### ASCII

Converts a single character string to its corresponding ASCII code, between 0 and 255.

Syntax:

`ASCII (character_expression)`

where:

*character\_expression* Any expression that evaluates to an ASCII character.

If the character expression evaluates to more than one character, the ASCII code corresponding to the first character in the expression is returned.

### BIT\_LENGTH

Returns the length, in bits, of a specified string. Each Unicode character is 2 bytes in length, which is equal to 16 bits.

Syntax:

`BIT_LENGTH (character_expression)`

where:

*character\_expression* Any expression that evaluates to character string.

## CHAR

Converts a numerical value between 0 and 255 to the character value corresponding to the ASCII code.

Syntax:

CHAR (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value between 0 and 255.

## CHAR\_LENGTH

Returns the length, in number of characters, of a specified string. Leading and trailing blanks are not counted in the length of the string.

Syntax:

CHAR\_LENGTH (*character\_expression*)

where:

*character\_expression*      Any expression that evaluates to a numerical value between 0 and 255.

## CONCAT

There are two forms of this function. The first form concatenates two character strings. The second form uses the character string concatenation character to concatenate more than two character strings.

Form 1 Syntax:

CONCAT (*character\_expression1*, *character\_expression2*)

where:

*character\_expression*      Expressions that evaluate to character strings.

Form 2 Syntax:

*string\_expression1* || *string\_expression2* || ... *string\_expressionx*

where:

*string\_expression*      Expressions that evaluate to character strings, separated by the character string concatenation operator || (double vertical bars). The first string is concatenated with the second string to produce an intermediate string, which is then concatenated with the next string, and so on.

Example:

Account. "Account Name" || '-' || Account. "Account Location"

Results look like:

Action Rentals - Headquarters

### INSERT

Inserts a specified character string into a specified location in another character string, replacing a specified number of characters in the target string.

Syntax:

```
INSERT(character_expression1, n, m, character_expression2)
```

where:

*character\_expression1* Any expression that evaluates to a character string. This is the string receiving the insertion.

*character\_expression2* Any expression that evaluates to a character string. This is the string to insert.

*n* Any positive integer representing the number of characters from the start of the first string where a portion of the second string is inserted.

*m* Any positive integer representing the number of characters in the first string to be replaced by the entirety of the second string.

### LEFT

Returns a specified number of characters from the left of a string.

Syntax:

```
LEFT(character_expression, n)
```

where:

*character\_expression* Any expression that evaluates to a character string.

*n* Any positive integer representing the number of characters from the left of the string that are returned.

### LENGTH

Returns the length, in number of characters, of a specified string. The length is returned excluding any trailing blank characters.

Syntax:

```
LENGTH(character_expression)
```

where:

*character\_expression* Any expression that evaluates to a character string.



## LOCATE

Returns the numerical position of the one string within another string. If the string is not found, the LOCATE function returns a value of 0. If you want to specify a starting position to begin the search, use the LOCATEN function instead.

Syntax:

```
LOCATE(character_expression1, character_expression2)
```

where:

<i>character_expression1</i>	Any expression that evaluates to a character string. This is the expression to search for in the character expression.
<i>character_expression2</i>	Any expression that evaluates to a character string. This is the expression to be searched.

## LOCATEN

Returns the numerical position of one string within another string. This is identical to the LOCATE function, except that the search begins at the position specified by an integer argument. If the string is not found, the LOCATEN function returns a value of 0. The numerical position to return is determined by counting the first character in the string as occupying position 1, regardless of the value of the integer argument.

Syntax:

```
LOCATE(character_expression1, character_expression2, n)
```

where:

<i>character_expression1</i>	Any expression that evaluates to a character string. This is the string to search for.
<i>character_expression2</i>	Any expression that evaluates to a character string. This is the string to be searched.
<i>n</i>	Any positive, nonzero integer that represents the starting position to begin to look for the locate expression.

## LOWER

Converts a character string to lower case.

Syntax:

```
LOWER (character_expression)
```

where:

<i>character_expression</i>	Any expression that evaluates to a character string.
-----------------------------	--

### OCTET\_LENGTH

Returns the bits, in base 8 units (number of bytes), of a specified string.

Syntax:

OCTET\_LENGTH (character\_expression)

where:

*character\_expression* Any expression that evaluates to a character string.

### POSITION

Returns the numerical position of one string within another string. If the string is not found, the function returns 0.

Syntax:

POSITION(character\_expression1 IN character\_expression2)

where:

*character\_expression1* Any expression that evaluates to a character string. This is the string to search for.

*character\_expression2* Any expression that evaluates to a character string. This is the string in which to search.

### REPEAT

Repeats a specified expression n times, where n is a positive integer.

Syntax:

REPEAT(character\_expression, n)

### REPLACE

Replaces specified characters in a string with other specified characters.

Syntax:

REPLACE(character\_expression, change\_expression, replace\_with\_expression)

where:

*character\_expression* Any expression that evaluates to a character string. This string will have its characters replaced.

*change\_expression* Any expression that evaluates to a character string. Specifies the characters in the first string that will be replaced.

*replace\_with\_expression* Any expression that evaluates to a character string. Specifies the replacement characters to substitute into the first string.

## RIGHT

Returns a specified number of characters from the right of a string.

Syntax:

```
RIGHT(character_expression, n)
```

where:

*character\_expression* Any expression that evaluates to a character string.

*n* Any positive integer representing the number of characters from the right of the first string that are returned.

## SPACE

Inserts blank spaces.

Syntax:

```
Space(integer)
```

where:

*integer* Any expression that evaluates to a character string.

## SUBSTRING

Creates a new string starting from a fixed number of characters into the original string.

Syntax:

```
SUBSTRING (character_expression FROM starting_position)
```

where:

*character\_expression* Any expression that evaluates to a character string.

*starting\_position* A positive integer that indicates the starting position within the first character string.

Example:

```
SUBSTRING ('ABCDEF' FROM 3)
```

Results in:

```
CDEF
```

### TRIM

Strips specified leading and/or trailing characters from a character string.

Syntax:

TRIM (type 'character' FROM character\_expression)

where:

<i>type</i>	LEADING	Strips specified leading characters from a character string.
	TRAILING	Strips specified trailing characters from a character string.
	BOTH	Strips specified characters, both leading and trailing, from a character string.
<i>character</i>		Any single character. If the character part of the specification and the single quotes are omitted, a space character is used as a default.
<i>character_expression</i>		Any expression that evaluates to a character string.

**NOTE:** The syntax TRIM (character\_expression) is also valid. This trims all leading and trailing spaces.

### UPPER

Converts a character string to uppercase.

Syntax:

UPPER (character\_expression)

where:

*character\_expression* Any expression that evaluates to a character string.

## Math Functions

The math functions perform mathematical operations.

### Abs

Calculates the absolute value of a numerical expression.

Syntax:

ABS (n\_expression)

where:

*n\_expression* Any expression that evaluates to a numerical value.

## Acos

Calculates the arc cosine of a numerical expression.

Syntax:

ACOS (n\_expression)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## Asin

Calculates the arc sine of a numerical expression.

Syntax:

ASIN (n\_expression)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## Atan

Calculates the arc tangent of a numerical expression.

Syntax:

ATAN (n\_expression)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## Atan2

Calculates the arc tangent of  $y/x$ , where  $y$  is the first numerical expression and  $x$  is the second numerical expression.

Syntax:

ATAN2 (n\_expression1, n\_expression2)

where:

*n\_expression (1 and 2)*      Any expression that evaluates to a numerical value.

### Ceiling

Rounds a noninteger numerical expression to the next highest integer. If the numerical expression evaluates to an integer, the Ceiling function returns that integer.

Syntax:

CEILING (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

### Cos

Calculates the cosine of a numerical expression.

Syntax:

COS (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

### Cot

Calculates the cotangent of a numerical expression.

Syntax:

COT (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

### Degrees

Converts an expression from radians to degrees.

Syntax:

DEGREES (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## Exp

Calculates the value e to the power specified.

Syntax:

EXP (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## Floor

Rounds a noninteger numerical expression to the next lowest integer. If the numerical expression evaluates to an integer, the FLOOR function returns that integer.

Syntax:

FLOOR (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## Log

Calculates the natural logarithm of an expression.

Syntax:

LOG (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## Log10

Calculates the base 10 logarithm of an expression.

Syntax:

LOG10 (*n\_expression*)

where:

*n\_expression*      Any expression that evaluates to a numerical value.

### Mod

Divides the first numerical expression by the second numerical expression and returns the remainder portion of the quotient.

Syntax:

MOD (n\_expression1, n\_expression2)

where:

*n\_expression (1 and 2)* Any expression that evaluates to a numerical value.

### Pi

Returns the constant value of pi (the circumference of a circle divided by the diameter of a circle).

Syntax:

PI ()

### Power

Takes the first numerical expression and raises it to the power specified in the second numerical expression.

Syntax:

POWER(n\_expression1, n\_expression2)

where:

*n\_expression (1 and 2)* Any expression that evaluates to a numerical value.

### Radians

Converts an expression from degrees to radians.

Syntax:

RADIANS (n\_expression)

where:

*n\_expression* Any expression that evaluates to a numerical value.

### Rand

Returns a pseudo-random number between 0 and 1.

Syntax:

RAND()



## RandFromSeed

Returns a pseudo-random number based on a seed value. For a given seed value, the same set of random numbers are generated.

Syntax:

`RAND (n_expression)`

where:

*n\_expression*      Any expression that evaluates to a numerical value.

## Round

Rounds a numerical expression to n digits of precision.

Syntax:

`ROUND (n_expression, n)`

where:

*n\_expression*      Any expression that evaluates to a numerical value.

*n*      Any positive integer representing the number of digits of precision (that is, the number of decimal places) to which to round.

Example:

`ROUND (12.358, 2)`

Returns:

12.36

## Sign

Returns a value of 1 if the numerical expression argument evaluates to a positive number, a value of -1 if the numerical expression argument evaluates to a negative number, and 0 if the numerical expression argument evaluates to zero.

Syntax:

`SIGN (n_expression)`

where:

*n\_expression*      Any expression that evaluates to a numerical value.

### Sin

Calculates the sine of a numerical expression.

Syntax:

SIN (n\_expression)

where:

*n\_expression* Any expression that evaluates to a numerical value.

### Sqrt

Calculates the square root of the numerical expression argument. The numerical expression has to evaluate to a nonnegative number.

Syntax:

SQRT (n\_expression)

where:

*n\_expression* Any expression that evaluates to a nonnegative numerical value.

### Tan

Calculates the tangent of a numerical expression.

Syntax:

TAN (n\_expression)

where:

*n\_expression* Any expression that evaluates to a numerical value.

### Truncate

Truncates a decimal number to return a specified number of decimal places.

Syntax:

TRUNCATE (n\_expression, n)

where:

*n\_expression* Any expression that evaluates to a numerical value.

*n* Any positive integer representing the number of decimal places that are returned.

Example:

```
TRUNCATE (12.358, 2)
```

Returns:

```
12.35
```

## Calendar Date/Time Functions

The calendar date/time functions manipulate data in data types for date, time and timestamp. (The timestamp data type is a combination of date and time.)

### Current\_Date

Returns the current date. The date is determined by the system in which Siebel CRM On Demand Answers is running. The value does not contain a time component.

Syntax:

```
CURRENT_DATE
```

### Current\_Time

Returns the current time. The time is determined by the system in which Siebel CRM On Demand Answers is running. The value does not contain a date component.

Syntax:

```
CURRENT_TIME (n)
```

where:

- n* Any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

### Current\_TimeStamp

Returns the current date/timestamp. The timestamp is determined by the system in which the Siebel Analytics Server is running.

Syntax:

`CURRENT_TIMESTAMP (n)`

where:

*n* Any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

### Day\_Of\_Quarter

Returns a number (between 1 and 92) corresponding to the day of the quarter for the specified date.

Syntax:

`DAY_OF_QUARTER (date_expression)`

where:

*date\_expression* Any expression that evaluates to a date.

### DayName

Returns the name of the day of the week (in English) for a specified date.

Syntax:

`DAYNAME (date_expression)`

where:

*date\_expression* Any expression that evaluates to a date.

### DayOfMonth

Returns the number corresponding to the day of the month for a specified date.

Syntax:

`DAYOFMONTH (date_expression)`

where:

*date\_expression* Any expression that evaluates to a date.

## DayOfWeek

Returns a number between 1 and 7, corresponding to the day of the week, for a specified date. The number 1 corresponds to Sunday, and the number 7 corresponds to Saturday.

Syntax:

DAYOFWEEK (date\_expression)

where:

*date\_expression* Any expression that evaluates to a date.

## DayOfYear

Returns the number (between 1 and 366) corresponding to the day of the year for a specified date.

Syntax:

DAYOFYEAR (date\_expression)

where:

*date\_expression* Any expression that evaluates to a date.

## Hour

Returns a number (between 0 and 23) corresponding to the hour for a specified time. For example, 0 corresponds to 12 a.m. and 23 corresponds to 11 p.m.

Syntax:

HOURL (time\_expression)

where:

*time\_expression* Any expression that evaluates to a time.

## Minute

Returns a number (between 0 and 59) corresponding to the minute for a specified time.

Syntax:

MINUTE (time\_expression)

where:

*time\_expression* Any expression that evaluates to a time.

### Month

Returns the number (between 1 and 12) corresponding to the month for a specified date.

Syntax:

`MONTH (date_expression)`

where:

*date\_expression* Any expression that evaluates to a date.

### Month\_Of\_Quarter

Returns the number (between 1 and 3) corresponding to the month in the quarter for a specified date.

Syntax:

`MONTH_OF_QUARTER (date_expression)`

where:

*date\_expression* Any expression that evaluates to a date.

### MonthName

Returns the name of the month (in English) for a specified date.

Syntax:

`MONTHNAME (date_expression)`

where:

*date\_expression* Any expression that evaluates to a date.

### Now

Returns the current timestamp. The NOW function is equivalent to the CURRENT\_TIMESTAMP function.

Syntax:

`NOW ()`

### Quarter\_Of\_Year

Returns the number (between 1 and 4) corresponding to the quarter of the year for a specified date.

Syntax:

`QUARTER_OF_YEAR (date_expression)`

where:

*date\_expression* Any expression that evaluates to a date.

## Second

Returns the number (between 0 and 59) corresponding to the seconds for a specified time.

Syntax:

`SECOND (time_expression)`

where:

*time\_expression* Any expression that evaluates to a time.

## TimestampAdd

The TimestampAdd function adds a specified number of intervals to a specified timestamp. A single timestamp is returned.

Syntax:

`TimestampAdd (interval, integer_expression, timestamp_expression)`

where:

<i>interval</i>	The specified interval. Valid values are:  SQL_TSI_SECOND  SQL_TSI_MINUTE  SQL_TSI_HOUR  SQL_TSI_DAY  SQL_TSI_WEEK  SQL_TSI_MONTH  SQL_TSI_QUARTER  SQL_TSI_YEAR
<i>integer_expression</i>	Any expression that evaluates to an integer. This is the number of intervals to add.
<i>timestamp_expression</i>	The timestamp used as the base in the calculation.

A null integer-expression or a null timestamp-expression passed to this function will result in a null return value.

In the simplest scenario, this function merely adds the specified integer value (*integer\_expression*) to the appropriate component of the timestamp, based on the interval. Adding a week translates to adding seven days, and adding a quarter translates to adding three months. A negative integer value results in a subtraction (going back in time).

An overflow of the specified component (such as more than 60 seconds, 24 hours, twelve months, and so on) necessitates adding an appropriate amount to the next component. For example, when adding to the day component of a timestamp, this function considers overflow

and takes into account the number of days in a particular month (including leap years when February has 29 days).

When adding to the month component of a timestamp, this function verifies that the resulting timestamp has a sufficient number of days for the day component. For example, adding 1 month to 2000-05-31 does not result in 2000-06-31 because June does not have 31 days. This function reduces the day component to the last day of the month, 2000-06-30 in this example.

A similar issue arises when adding to the year component of a timestamp having a month component of February and a day component of 29 (that is, last day of February in a leap year). If the resulting timestamp does not fall on a leap year, the function reduces the day component to 28.

The following are examples of the TimestampAdd function:

The following code example asks for the resulting timestamp when 3 days are added to 2000-02-27 14:30:00. Since February, 2000 is a leap year, this returns a single timestamp of 2000-03-01 14:30:00.

```
Ti m e s t a m p A d d ( S Q L _ T S I _ D A Y , 3 , T I M E S T A M P ' 2 0 0 0 - 0 2 - 2 7 1 4 : 3 0 : 0 0 ' )
```

The following code example asks for the resulting timestamp when 7 months are added to 1999-07-31 0:0:0. This returns a single timestamp of 2000-02-29 00:00:00. Notice the reduction of day component to 29 because of the shorter month of February.

```
Ti m e s t a m p A d d ( S Q L _ T S I _ M O N T H , 7 , T I M E S T A M P ' 1 9 9 9 - 0 7 - 3 1 0 0 : 0 0 : 0 0 ' )
```

The following code example asks for the resulting timestamp when 25 minutes are added to 2000-07-31 23:35:00. This returns a single timestamp of 2000-08-01 00:00:00. Notice the propagation of overflow through the month component.

```
Ti m e s t a m p A d d ( S Q L _ T S I _ M I N U T E , 2 5 , T I M E S T A M P ' 2 0 0 0 - 0 7 - 3 1 2 3 : 3 5 : 0 0 ' )
```

## TimeStampDiff

The TimestampDiff function returns the total number of specified intervals between two timestamps.

Syntax:

```
Ti m e s t a m p D i f f ( i n t e r v a l , t i m e s t a m p _ e x p r e s s i o n 1 , t i m e s t a m p _ e x p r e s s i o n 2 )
```

where:

*interval*                      The specified interval. Valid values are:

SQL\_TSI\_SECOND

SQL\_TSI\_MINUTE

SQL\_TSI\_HOUR

SQL\_TSI\_DAY

SQL\_TSI\_WEEK

SQL\_TSI\_MONTH



SQL\_TSI\_QUARTER

SQL\_TSI\_YEAR

*timestamp\_expression1* The timestamp to subtract from the second timestamp.

*timestamp\_expression2* The second timestamp. *timestamp\_expression1* is subtracted from this timestamp to determine the difference.

A null timestamp-expression parameter passed to this function will result in a null return value.

This function first determines the timestamp component that corresponds to the specified interval parameter. For example, SQL\_TSI\_DAY corresponds to the day component and SQL\_TSI\_MONTH corresponds to the month component.

The function then looks at the higher order components of both timestamps to calculate the total number of intervals for each timestamp. For example, if the specified interval corresponds to the month component, the function calculates the total number of months for each timestamp by adding the month component and twelve times the year component.

Finally, the function subtracts the first timestamp's total number of intervals from the second timestamp's total number of intervals.

The TimestampDiff function rounds up to the next integer whenever fractional intervals represent a crossing of an interval boundary. For example, the difference in years between 1999-12-31 and 2000-01-01 is one year because the fractional year represents a crossing from one year to the next (that is, 1999 to 2000). By contrast, the difference between 1999-01-01 and 1999-12-31 is zero years because the fractional interval falls entirely within a particular year (that is, 1999).

When calculating the difference in weeks, the function calculates the difference in days and divides by seven before rounding.

When calculating the difference in quarters, the function calculates the difference in months and divides by three before rounding.

### TimestampDiff Function and Results Example

The following code example asks for a difference in days between timestamps 1998-07-31 23:35:00 and 2000-04-01 14:24:00. It returns a value of 610. Notice that the leap year in 2000 results in an additional day.

```
TimestampDiff(SQL_TSI_DAY, Timestamp '1998-07-31 23:35:00', Timestamp '2000-04-01 14:24:00')
```

### Week\_Of\_Quarter

Returns a number (between 1 and 13) corresponding to the week of the quarter for the specified date.

Syntax:

WEEK\_OF\_QUARTER (date\_expression)

where:

*date\_expression* Any expression that evaluates to a date.

### Week\_Of\_Year

Returns a number (between 1 and 53) corresponding to the week of the year for the specified date.

Syntax:

WEEK\_OF\_YEAR (date\_expression)

where:

*date\_expression* Any expression that evaluates to a date.

### Year

Returns the year for the specified date.

Syntax:

YEAR (date\_expression)

where:

*date\_expression* Any expression that evaluates to a date.

Example:

YEAR (CURRENT\_DATE)

## Conversion Functions

The conversion functions convert a value from one form to another.

### Cast

Changes the data type of either a value or a null value to another data type. This change is required before using values of one data type in a function or operation that expects another data type.

Syntax:

```
CAST (expression|NULL AS datatype)
```

The supported data types to which the value can be changed are the following:

```
CHARACTER, VARCHAR, INTEGER, FLOAT, SMALLINT, DOUBLE PRECISION, DATE, TIME,  
TIMESTAMP, BIT, BIT VARYING
```

Depending on the source data type, some destination types are not supported. For example, if the source data type is a BIT string, the destination data type has to be a character string or another BIT string.

Example:

The following first changes (CASTs) Annual Revenues to an INTEGER to remove the decimal places, and then to a CHARACTER so that it can be concatenated with a character literal (the text 'K'):

```
CAST ( CAST ( Account."Account Revenue"/1000 AS INTEGER ) AS CHARACTER ) || '  
K'
```

## IfNull

Tests if an expression evaluates to a null value, and if it does, assigns the specified value to the expression.

Syntax:

```
IFNULL (expression, value)
```

## ValueOf()

Use the VALUEOF function in an expression builder or filter to reference the value of a session variable defined in Siebel CRM On Demand - Answers. For more information, see [Session Variables](#) (on page 497).

Session variables should be used as arguments of the VALUEOF function. Refer to session variables by name.

Example:

To use the value of a session variable named NQ\_SESSION.CURRENT\_YEAR:

```
CASE WHEN "Year" > VALUEOF(NQ_SESSION.CURRENT_YEAR) THEN 'Future' WHEN ...  
ELSE ... END
```

You must refer to a session variable by its fully qualified name.

## System Functions

The system functions return values relating to the session.

### User

Returns the current Siebel CRM On Demand user's User ID. This ID is unique to each user.

Syntax:

USER ()

## Operators

Operators are used to combine expression elements to make certain types of comparisons in an expression.

Operator	Function in an Expression
+	Plus sign for addition.
-	Minus sign for subtraction
*	Multiply sign for multiplication
/	Divide by sign for division
	Character string concatenation
(	Open parenthesis, for grouping operations
)	Close parenthesis, for grouping operations
>	Greater than sign, indicating values higher than the comparison
<	Less than sign, indicating values lower than the comparison
=	Equal sign, indicating the same value
<=	Less than or equal to sign, indicating values the same or lower than the comparison
>=	Greater than or equal to sign, indicating values the same or higher than the comparison
<>	Not equal to, indicating values higher or lower, but not the same
AND	AND connective, indicating intersection with one or more conditions to form a compound condition
OR	OR connective, indicating the union with one or more conditions to form a compound condition
NOT	NOT connective, indicating a condition is not met
,	Comma, used to separate elements in a list

## Case Statements

Case statements are building blocks for creating conditional expressions that can produce different results for different column values.

### Case (Switch)

This form of the Case statement is also referred to as the CASE (Lookup) form. The value of expression1 is examined, then the WHEN expressions. If expression1 matches any WHEN expression, it assigns the value in the corresponding THEN expression.

If expression1 matches an expression in more than one WHEN clause, only the expression following the first match is assigned.

If none of the WHEN expressions match, it assigns the value specified in the ELSE expression. If no ELSE expression is specified, it assigns the value NULL.

Refer also to the Case (If) statement.

Syntax:

```
CASE expressi on1
  WHEN expressi on THEN expressi on
  {WHEN expressi on. . . THEN expressi on. . . }
  ELSE expressi on
END
```

Where:

**CASE**

Starts the CASE statement. Must be followed by an expression and one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword.

**WHEN**

Specifies the condition to be satisfied.

**THEN**

Specifies the value to assign if the corresponding WHEN expression is satisfied.

**ELSE**

Specifies the value to assign if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed.

**END**

Ends the CASE statement.

### Example

```
CASE Score-par
    WHEN -5 THEN 'Birdie on Par 6'
    WHEN -4 THEN 'Must be Tiger'
    WHEN -3 THEN 'Three under par'
    WHEN -2 THEN 'Two under par'
    WHEN -1 THEN 'Birdie'
    WHEN 0 THEN 'Par'
    WHEN 1 THEN 'Bogey'
    WHEN 2 THEN 'Double Bogey'
    ELSE 'Triple Bogey or Worse'
END
```

In the above example, the WHEN statements must reflect a strict equality; a WHEN condition of

```
WHEN < 0 THEN 'Under Par'
```

is illegal because comparison operators are not allowed.

### Case (If)

This form of the Case statement evaluates each WHEN condition and if satisfied, assigns the value in the corresponding THEN expression.

If none of the WHEN conditions are satisfied, it assigns the default value specified in the ELSE expression. If no ELSE expression is specified, it assigns the value NULL.

Refer also to the Case (Switch) statement.

Syntax:

```
CASE
    WHEN request_condi ti on1 THEN expressi on1
    {WHEN request_condi ti on2 THEN expressi on2}
    {WHEN request_condi ti on. . . THEN expressi on. . . }
    ELSE expressi on
END
```

Where:

CASE

Starts the CASE statement. Must be followed by one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword.

**WHEN**

Specifies the condition to be satisfied.

**THEN**

The value to assign if the corresponding WHEN expression is satisfied.

**ELSE**

Specifies the value if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed.

**END**

Ends the CASE statement.

**Example****CASE**

```
WHEN score-par < 0 THEN 'Under Par'
WHEN score-par = 0 THEN 'Par'
WHEN score-par = 1 THEN 'Bogey'
WHEN score-par = 2 THEN 'Double Bogey'
ELSE 'Triple Bogey or Worse'
```

**END**

Unlike the Switch form of the CASE statement, the WHEN statements in the If form allow comparison operators; a WHEN condition of

```
WHEN < 0 THEN 'Under Par'
```

is legal.

## Expressing Literals

A literal is a non-null value corresponding to a given data type. Literals are typically constant values; that is, they are values that are taken literally *as is*, without changing them at all. A literal value has to comply with the data type it represents.

This section describes how to express each type of literal in Siebel CRM On Demand Answers.

### Character Literals

A character literal contains characters such as letters, numbers and symbols. To express a character literal, surround the character string with single quotes ( ' ). The length of the literal is determined by the number of characters between the single quotes.

### Datetime Literals

The SQL 92 standard defines three kinds of typed datetime literals, in the following formats:

DATE 'yyyy-MM-dd'

TIME 'hh:MM:ss'

TIMESTAMP 'yyyy-MM-dd hh:mm:ss'

These formats are fixed. To express a typed datetime literal, use the keywords DATE, TIME, or TIMESTAMP followed by a datetime string enclosed in single quote marks. Two digits are required for all non-year components even if the value is a single digit.

Example:

```
CASE
    WHEN Opportunity."Close Date" >= TIMESTAMP '2006-01-01 00:00:00' THEN
        '2006'
    ELSE 'Pre-2006'
END
```

### Numeric Literals

A numeric literal represents a value of a numeric data type. To express a numeric literal, simply include the number.

Do not surround numeric literals with single quotes; doing so expresses the literal as a character literal.

A number can be preceded with either a plus sign (+) or minus sign (-) to indicate a positive or negative number, respectively. Numbers can contain a decimal point and decimal numbers.

To express floating point numbers as literal constants, enter a number followed by the letter *E* (either uppercase or lowercase) and followed by the plus sign (+) or the minus sign (-) to indicate a positive or negative exponent. No spaces are allowed between the integer, the letter *E*, and the sign of the exponent.

Examples:

```
52
2.98
-326
12.5E6
```



## Session Variables

Session variables contain values that may be referred to in other functions. When referring to the variable, use the `VALUEOF( )` function to get its value.

In general, all of these variable values can be derived through calls to other functions, so in a sense they are redundant. However you may see them in pre-defined reports, so they are defined here for reference.

This is not a complete list.

<code>NQ_SESSION.CURRENT_YEAR</code>	The current year.
<code>NQ_SESSION.CURRENT_QTR</code>	The current quarter number.
<code>NQ_SESSION.CURRENT_MONTH</code>	The current month number.
<code>NQ_SESSION.LAST_YEAR</code>	Last year.
<code>NQ_SESSION.NEXT_YEAR</code>	Next year.
<code>NQ_SESSION.USER</code>	The User ID of the current user (same as calling the <code>USER( )</code> function).



# 21 Dashboards

---

The Dashboard Homepage shows a list of the dashboards that are available to you. A dashboard can display content, such as saved Siebel CRM On Demand Answers requests, images, charts, tables, text, and links to Web sites and documents. A number of prebuilt dashboards are provided, which group reports into business areas. Each prebuilt dashboard is displayed on a separate page for easy viewing and analysis of your data. Users whose role has the Manage Dashboards privilege can also create interactive dashboards.

## Related Topics

Steps for Dashboards 501

## About Dashboards

Dashboards can display saved Siebel CRM On Demand Answers requests, images, charts, tables, text, and links to Web sites and documents. A dashboard consists of one or more pages, which appear as tabs across the top of the dashboard.

Siebel CRM On Demand provides a number of prebuilt dashboards. In addition, users who have the Manage Dashboards privilege in their role can create interactive dashboards that provide customized views of corporate and external information. If your role has this privilege, you can use the dashboard editor in Siebel CRM On Demand Answers to add content to an interactive dashboard by dragging and dropping the content from a selection pane onto the dashboard layout page. The layout page consists of columns to align the content, and each column contains sections that hold the content. The appearance of a dashboard, such as the background colors and the size of text, is controlled by styles. You can also change the dashboard appearance using the cosmetic formatting dialog box.

**NOTE:** You cannot change the prebuilt dashboards in CRM On Demand.

Interactive dashboards can contain three types of content:

- Dashboard objects
- Content that is saved in the CRM On Demand Presentation Catalog
- Views of folders in the CRM On Demand Presentation Catalog

When creating or viewing interactive dashboards, note the following points:

- A user who creates or edits an interactive dashboard can add to the dashboard any reports to which they have access.

Reports are stored in folders, and access to these folders is determined by user roles. The Manage Dashboard privilege (which allows users to create and edit interactive dashboards) does not include the Manage Custom Reports privilege (which provides full access to all report subfolders and reports under the Company Wide Shared Folder). For more information about folder visibility, see the [About Reports](#) (on page 362) and [Setting Up User Visibility to Shared Report Folders](#) (on page 366) topics.

- Reports added to interactive dashboards may not be visible to all users in the company (depending on their role).

If a user's role does not allow the user to view a certain report on a dashboard, the user sees an error message on the dashboard where the report would have been displayed.

- If a report is deleted after it has been added to a dashboard, a user editing the dashboard sees an exclamation mark (!) beside the report name in the Dashboard Editor. A user viewing the dashboard sees an error message where the report would have been displayed.

The following table provides definitions of the common terms in the dashboard editor in CRM On Demand Answers.

Term	Definition
Columns	Columns are used to align the content on a dashboard. (The sections within columns hold the content.) You can create as many columns on a dashboard page as you want. Every new dashboard page automatically contains one empty column with one empty section in it. The columns used in dashboards are not related to the columns used in reports.
Dashboard Objects	Dashboard objects are items that are used only in a dashboard. Examples of dashboard objects are sections that hold content and navigation links.
Folders	Folders are organizational constructs that hold content saved in the CRM On Demand Presentation Catalog, such as requests created with CRM On Demand Answers. A folder is similar to a UNIX directory, or a Microsoft Windows folder.
Pages	Pages contain the columns and sections that hold the content of a dashboard. Every dashboard has at least one page. In the dashboard editor, pages are identified by tabs across the top of the dashboard. Multiple pages are used to organize content. For example, you might have one page to store results from CRM On Demand Answers that you refer to every day, another page that contains links to the Web sites of your suppliers, and one that links to your corporate intranet.

Term	Definition
Results	Results, also called reports, are the output returned from the CRM On Demand server that matches the request criteria specified using CRM On Demand Answers. The default format for viewing results in a dashboard is to show them in a table. Results can also be shown in other formats, such as charts. You can examine and analyze results, save or print them, or download them to a spreadsheet.
Sections	Sections appear in columns in the dashboard layout. They hold the content dragged and dropped from the selection pane, and are used to organize the content within a column.
Styles	Styles control how dashboards and results are formatted for display, such as the color of text and links, the font and size of text, the borders in tables, the colors and attributes of charts, and so on. Styles are organized into folders that contain Cascading Style Sheets (files with a .css extension), images, and chart templates. You can override some elements in the style sheets, such as the table borders and text size, when formatting results in CRM On Demand Answers.
Presentation Catalog	The CRM On Demand Presentation Catalog stores the content created using CRM On Demand Answers. The types of content stored in the Presentation Catalog include: requests created with CRM On Demand Answers, filters that are applied to results, and information about dashboards.

### Related Topics

Steps for Dashboards 501

About Reports 362

## Steps for Dashboards

If your role has the Manage Dashboards privilege, you can use the dashboard editor in Siebel CRM On Demand Answers to create and edit interactive dashboards. Click a topic to see step-by-step instructions to do the following:

- [Creating Interactive Dashboards](#) (on page 502)
- [Adding Pages to Interactive Dashboards](#) (on page 503)
- [Adding and Displaying Content on Interactive Dashboard Pages](#) (on page 503)
- [Renaming Dashboard Objects](#) (on page 516)
- [Deleting Dashboard Objects](#) (on page 516)
- [Changing the Properties of Interactive Dashboards](#) (on page 517)
- [Changing PDF and Printing Options on Interactive Dashboards](#) (on page 519)

- [Creating Prompts for Interactive Dashboards](#) (on page 520)
- [Changing the Name or Description of an Interactive Dashboard](#) (on page 523)
- [Viewing Dashboards](#) (on page 523)

### Related Topics

About Dashboards 499

## Creating Interactive Dashboards

This topic describes how to create a new interactive dashboard.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To create an interactive dashboard*

- 1 Click the Dashboard tab.
- 2 On the Dashboard page, click the Manage Dashboards link.
- 3 On the Manage Dashboards page, click New Dashboard.
- 4 On the Dashboards Edit page, enter the name and description for the dashboard, and then click Save.

The Manage Dashboards page is displayed again.

- 5 On the Manage Dashboards page, click the Design link for the dashboard that you created.

The dashboard editor in CRM On Demand Answers appears in a separate window, independent of the other CRM On Demand pages. The name of the new dashboard appears at the top of the page

**NOTE:** Newly created dashboards contain one blank page. Dashboards that contain only one page do not display the page name as a tab at the top of the dashboard. Dashboard page names appear at the top of a dashboard only when the dashboard contains multiple pages.

When you have created your dashboard, you can add content to the dashboard. For more information on how to manage dashboard content, control the appearance of dashboards, and add pages to dashboards, see the following topics:

- [Adding Pages to Interactive Dashboards](#) (on page 503)
- [Adding and Displaying Content on Interactive Dashboard Pages](#) (on page 503)
- [Changing the Properties of Interactive Dashboards](#) (on page 517)
- [Creating Prompts for Interactive Dashboards](#) (on page 520)

## Adding Pages to Interactive Dashboards

You can add pages to an interactive dashboard.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To add a page to an interactive dashboard*

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).

- 2 On the Dashboard Editor page, click the Add Dashboard Page icon near the top of the page.



- 3 Enter a name and a description for the dashboard page.

- 4 Click Finished.

The new page appears on the dashboard.

**NOTE:** If there is only one page in the dashboard, the page name will not appear on a tab. Tabs appear only when there is more than one page, so you can click the tabs to move between the pages.

## Adding and Displaying Content on Interactive Dashboard Pages

The following topics describe how to add and display content on interactive dashboard pages.

**NOTE:** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

- [Navigating to the Dashboard Editor](#) (on page 504)
- [Controlling the Appearance of Interactive Dashboard Pages](#) (on page 505)
- [Making Content Appear Conditionally on Interactive Dashboard Pages](#) (on page 507)
- [Adding Guided Navigation Links to Interactive Dashboard Pages](#) (on page 508)
- [Adding Text Links and Image Links to Interactive Dashboard Pages](#) (on page 508)
- [Adding Views of Presentation Catalog Folders to Interactive Dashboard Pages](#) (on page 511)

- [Adding Content Saved in the Presentation Catalog to Interactive Dashboard Pages](#) (on page 512)
- [Controlling How Results Display When Users Drill Down in Interactive Dashboard Pages](#) (on page 513)
- [Editing the Properties of Interactive Dashboard Prompts and Reports](#) (on page 513)
- [Applying Formatting to Interactive Dashboards](#) (on page 515)

### Related Topics

Creating Interactive Dashboards	502
Adding Pages to Interactive Dashboards	503
Renaming Dashboard Objects	516
Deleting Dashboard Objects	516
Changing the Properties of Interactive Dashboards	517
Changing PDF and Printing Options on Interactive Dashboards	519
Creating Prompts for Interactive Dashboards	520
About Guided Navigation in Interactive Dashboards	524

## Navigating to the Dashboard Editor

In the dashboard editor in CRM On Demand Answers, you can add content to interactive dashboards. You can also control the appearance of the dashboards, and rename and delete objects on them.

**NOTE:** You cannot change the prebuilt dashboards in CRM On Demand.

This topic describes how to navigate to the dashboard editor to work with existing interactive dashboards. If you want to create a new dashboard, see [Creating Interactive Dashboards](#) (on page 502).

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To navigate to the dashboard editor*

- 1 Click the Dashboard tab.
- 2 On the Dashboard page, click the Manage Dashboards link.



- 3 On the Manage Dashboards page, click the Design link for the dashboard that you want to edit.

The dashboard editor in CRM On Demand Answers appears in a separate window, independent of the other CRM On Demand pages.

The following procedure explains how to select the dashboard page that you want to work with.

### *To select a dashboard page*

**NOTE:** If you were already working on a dashboard page, performing this action saves any changes you made to the page that you were working on.

- From the Page drop-down list next to the name of the dashboard on the Dashboard Editor page, select the page that you want to edit.

## Controlling the Appearance of Interactive Dashboard Pages

This topic explains how to control the appearance of the dashboard pages using the dashboard editor. For more information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### Working with Columns in Interactive Dashboard Pages

Columns are used to align the content on a dashboard. The sections within the columns hold the content. You can add or remove columns, set the width in pixels or as a percentage of the dashboard page, and break columns.

When you have more than one column on a dashboard page, you can break the columns to arrange them on the page. (The drag-and-drop feature does not reposition the columns.) For example, if you have two columns side by side, breaking the rightmost column causes it to move beneath the first column, and both columns will span the width originally occupied when they were side by side. If you have three columns side by side, breaking the middle column causes the two outer columns to move beneath the first column, and the first column spans the width originally occupied by the first two columns.

### *To add a new column*

- Click the Add Column icon near the top of the Dashboard Editor page.



The column is added to the dashboard page.

### *To set the width of a column*

- 1 Click Properties, and choose Set Width.

The Column Properties dialog box appears.

- 2 In the Additional Formatting Options section, specify the column width:

- To specify the width in pixels, enter the number of pixels, for example, 200.
- To specify the width as a percentage of the dashboard page, use the percent (%) sign, for example, 20%.

- 3 Click OK.

### *To break a column*

- Click Properties, and choose Insert Column Break.

If you break the column again, the column layout reverts to the previous layout.

## **Adding Sections to Interactive Dashboard Pages**

Sections are used within columns to hold the content of a dashboard. Sections are aligned vertically by default. You can drag as many sections as you want into a column.

If you drag and drop content into a column without first adding a section to hold the content, a section is created automatically.

If you drag a section from one column into another column, any content in that section is also included.

### *To add a section to a column*

- From the selection pane, drag and drop a Section object from the Dashboard Objects area into the column.

The column is highlighted when you are at an appropriate location in the column to drop the section.

## Making Sections Appear Horizontally in Interactive Dashboard Pages

The default alignment for sections is to align them vertically.

### *To make a section appear horizontally*

- Click Properties for the section, and choose Arrange Horizontally.

## Saving Changes to Interactive Dashboard Pages

You can save your changes at any time.

### *To save changes to an interactive dashboard page*

Perform one of the following actions:

- Click Save.
- Leave the page that you are working on in the dashboard editor.

For example, your changes are saved if you add or edit another page, change the dashboard properties, or modify a prompt, filter, or request.

## Making Content Appear Conditionally on Interactive Dashboard Pages

You can make an entire section of a dashboard and its content appear conditionally based upon the results returned for a particular CRM On Demand Answers request. You can use this functionality to guide users as they view the dashboards. For more information about guiding users in this way, see [About Guided Navigation in Interactive Dashboards](#) (on page 524).

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To make content appear conditionally on an interactive dashboard page*

- 1 Navigate to the dashboard editor.  
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).
- 2 On the Dashboard Editor page, click Properties for the section that contains the content, and then select Guided Navigation.
- 3 In the Guided Navigation Properties dialog box, specify your choices, and browse to select the request from the Presentation Catalog.
- 4 Click OK.

## Adding Guided Navigation Links to Interactive Dashboard Pages

Guided navigation links in interactive dashboard pages can be static or conditional. Static links always appear. Conditional links appear only if the results meet certain criteria. You can use this functionality to guide users while they view the dashboards. For more information about guided navigation, see [About Guided Navigation in Interactive Dashboards](#) (on page 524).

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To add a guided navigation link to an interactive dashboard page*

- 1 Navigate to the dashboard editor.  
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).
- 2 On the Dashboard Editor page, drag and drop a Guided Navigation Link object from the selection pane into a section in the dashboard page.
- 3 Click the Properties button for the link.
- 4 In the Guided Navigation Link Properties dialog box, choose the type of link that you want to add:
  - To make the link conditional, specify your choices in the Conditional Link Properties area.
  - To make the link static, specify your choices in the Guided Navigation Properties area.

**NOTE:** For URLs, provide the full path.
- 5 Click OK.

## Adding Text Links and Image Links to Interactive Dashboard Pages

You can add text links and image links to a dashboard, and specify what is to happen when a user clicks the links. For example, you can direct users to another Web site or dashboard, open documents, launch applications, or perform any other action that your browser supports. You can also add an image or text only, without any links.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

*To add a text link or image to an interactive dashboard page*

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).

- 2 From the selection pane on the Dashboard Editor page, drag and drop a Link or Image object on to a section in the dashboard page.

- 3 Click the Properties button for the object.

The Link or Image Properties dialog box appears.

- 4 Specify your choices:

- For a text link, enter the text into the Caption field.
- For an image link, enter the location and name of the image into the Image field.

Specify the location as a URL. The following are examples:

`http://imageserver/MyImage.gif`  
`/DashboardFiles/image.gif`

If the image is not on the local server, the URL must include `http://`. If the image is for use in a shared environment, it must be located on a network drive that is accessible to all users.

If you want a caption for the image, enter a caption for the image in the Caption field, and use the Layout drop-down list to choose where the caption is to appear relative to the image.

- 5 Specify what is to happen when the user clicks the text or image:

- To specify that a request or dashboard is to appear when the user clicks the link or image, specify the destination as Request or Dashboard, and click the Browse button to select the request or dashboard.
- To specify that another action is to occur, such as opening a Web site, document, or program, specify the destination as a URL, and enter the full path into the field that follows the Destination options. In the Target area, choose whether the destination is to appear in the user's existing browser window or in a new window.

A link is defined as any URL (Uniform Resource Locator) that your browser can interpret. URLs can point to Web sites, documents, images, FTP sites, newsgroups, and so on. Depending on your browser, the following are examples of valid URLs:

`http://home.netscape.com/index.html`  
`ftp://ftp.microsoft.com`  
`news:news.announce.newusers`

See the following table for more information about the kinds of internal or external content to which you can link.

**NOTE:** Your company administrator can create a virtual directory called `\DashboardFiles` on the Presentation server for shared documents, and map the virtual directory to a shared network directory of the same name. This virtual directory allows users with the appropriate permissions to publish files to this folder, and reference these files by their relative URL names rather than by their fully qualified network share names, for example, `\DashboardFiles\AnnualReport.doc` instead of `\\SharedServer\CommonShare\DashboardFiles\AnnualReport.doc`.

**TIP:** When choosing whether the destination is to appear in the user's existing browser window or in a new window, note the following information. For every action except sending mail and executing a program, you can control how the link is to appear. Choose the current window when you want the action to occur in the display pane of the dashboard. The dashboard remains active, but in the background. Choose a new window when you want the action to take place in a new browser window.

**NOTE:** To add text or an image only, without any links, leave the field that follows the Destination options blank.

### 6 Click OK.

The following table shows link options for adding a text link or image using the dashboard editor.

Link Option	Comments
Web site or document	<p>You must locate the URL, or address, for the site or document. You can copy the destination address from your browser's address or location box, and then paste it.</p> <p>For a Web site, you can omit the <code>http: //</code> portion of the address if the URL resides on your Web server, such as your intranet site.</p> <p>If the URL resides on your organization's Web server, you can enter the relative address of the file. For example:</p> <p><code>\DashboardFiles\Logo.gif</code></p>
Local or shared document	<p>If the document is for use in a shared environment, it must be located on a network drive that is accessible to all users. Examples of the kinds of documents that you can open are spreadsheets containing recent sales reports, a slide presentation introducing a new product, a Microsoft Word document containing your company's annual report, a graphic file that contains a map from the airport to your corporate headquarters, and so on.</p> <p>For example, if the document is for your use only, a sample location might be:</p> <p><code>c: \mycomputer\reports\report.doc</code></p> <p>For a shared document, specify the UNC name, for example:</p> <p><code>\\ALLUSERS\reports\report.doc</code></p>

Link Option	Comments
Send email to a specified user	<p>You must know the mailto URL, for example:</p> <p><code>mailto:support@oracle.com</code></p> <p>When the user selects this link, the browser launches the email application with the To: field filled in. (The browser controls the launching of the email program.)</p>
Execute a program	<p>If the program is for use in a shared environment, it must be located on a network drive that is accessible to all users. You can use this feature to download and run an application. (The operating system controls the launching of the application.) For example, if you want to launch Microsoft Word for your use only, a sample location might be:</p> <p><code>c:\MSOFFICE\OFFICE\winword.exe</code></p> <p>For a multiuser-licensed program on a shared drive, specify the UNC name for the location, for example:</p> <p><code>\\ALLUSERS\SOFTWARE\MSOFFICE\OFFICE\WORD\winword.exe</code></p>
Refresh your browser using JavaScript	<p>Your browser must support JavaScript in order to use the following example.</p> <p><code>javascript:window.location.reload()</code></p> <p>In the Target area, choose the option Current Window.</p>

## Adding Views of Presentation Catalog Folders to Interactive Dashboard Pages

You can add a view of a CRM On Demand Presentation Catalog folder and its contents, such as saved requests, to a dashboard. For example, if you have a collection of saved requests that you run frequently, you can open the folder in the dashboard, navigate to a saved request, and click it to run it.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To add a view of a Presentation Catalog folder to an interactive dashboard page*

- 1 Navigate to the dashboard editor.  
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).
- 2 From the selection pane, drag and drop a Folder object on to a section in the dashboard page.

- 3 Click the Properties button for the folder.  
The Folder Properties dialog box appears.
- 4 Browse to select the folder, and click OK.
- 5 Click OK to save the properties.

## Adding Content Saved in the Presentation Catalog to Interactive Dashboard Pages

You can add content that you or someone else has already saved in a shared folder or dashboard, such as dashboard prompts and reports. To locate the content, you can browse by looking for the Presentation Catalog folder that the content is stored in, or for the dashboard that it appears on.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To add content saved in the Presentation Catalog to interactive dashboard pages*

- 1 Navigate to the dashboard editor.  
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).
- 2 From the selection pane on the Dashboard Editor page, in the Saved Content area, navigate to the folder or dashboard that contains the content you want to add to the dashboard.
- 3 Locate the content that you want to add, and drag and drop it into a section in the dashboard page.  
  
This step adds a shortcut to the content that was saved in the Presentation Catalog. If the content changes, the change will be reflected on the dashboard page.  
  
For information about editing the properties of dashboard prompts and reports, see [Editing the Properties of Interactive Dashboard Prompts and Reports](#) (on page 513).



## Controlling How Results Display When Users Drill Down in Interactive Dashboard Pages

You can control how results are displayed when a user drills down on a report in an interactive dashboard. The results can be displayed in one of the following ways:

- The new results can be displayed directly in the dashboard, replacing the original report.

This is the default behavior. The area occupied by the original report resizes automatically to hold the new results.

- The entire dashboard can be replaced with the new results.

This behavior is controlled by the Drill in Place option in the dashboard editor. The option is set at the section level, which means that it applies to all drillable reports within the section. Users can click the browser's Back button to return to the original report or the dashboard.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To control how results display when users drill down in interactive dashboard pages*

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).

- 2 On the Dashboard Editor page, click the Properties button for the section and make your selection for the Drill in Place option:

- To show the new results directly in the dashboard, click Drill in Place to select it. A check mark appears next to this option when it is selected. This is the default behavior.
- To replace the dashboard with the new results, click Drill in Place to remove the check mark.

## Editing the Properties of Interactive Dashboard Prompts and Reports

You can edit the properties of interactive dashboard prompts and reports added to a dashboard from the Presentation Catalog.

**NOTE:** When you edit the properties of interactive dashboard prompts and reports as described here, any other changes that you made to the page you are working on are also saved.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To edit the properties of an interactive dashboard prompt*

- 1 Navigate to the dashboard editor.  
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).
- 2 On the Dashboard Editor page, click the Properties button for the dashboard prompt and click Modify.  
The Dashboard Prompt page appears.
- 3 Make your changes to the dashboard prompt.
- 4 Click Save to save the dashboard prompt.

### *To edit the properties of a report*

- 1 Navigate to the dashboard editor.  
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).
- 2 On the Dashboard Editor page, click the Properties button for the report.
- 3 Select the property that you want to modify:
  - **Display Results**  
If you select the Embedded in Section option, the request will be executed automatically and the results displayed directly in the dashboard. This option is selected by default for reports.  
  
Alternatively, you can select to display the request as a link that users must click to execute the request, and you can specify whether the results are to show in the dashboard or in a separate window.
  - **Report Links**  
This option opens the Report Links dialog box, where you can select the links that you want to appear with the report on the dashboard page.
  - **Show View**  
This option shows the available views of the report constructed in CRM On Demand Answers. You can select the view that you want to see.
  - **Modify Request**  
This option displays the Criteria tab in CRM On Demand Answers, where you can modify the request that generates the report.

## Applying Formatting to Interactive Dashboards

In the dashboard editor in CRM On Demand Answers, a formatting dialog box provides access to and control over the visual attributes of dashboards. Depending on the object that you are formatting, the dialog box displays different options, such as font, cell, and border controls, background color, and additional formatting options, such as cell padding. The formatting affects the visual appearance of the columns and sections on a dashboard, such as background color and borders.

When selections for horizontal and vertical alignment appear, they are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of the other columns.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To apply formatting to an interactive dashboard*

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).

- 2 In the Dashboard Editor page, click the Properties button for a column or section and choose the Format Column or Format Section option.
- 3 In the Font area, make your selections for the font family, size, color, style (such as bold), and any effects that you want to apply (such as underlining).

**NOTE:** For some items, this option is not available.

- 4 In the Cell area, set up the alignment and background color.

**NOTE:** For horizontal alignment, the most common justification for text data is left. For numeric data, the most common justification is right.

Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

- 5 In the Border area, make your selections for the border position, color, and style of the cell.

**TIP:** You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position drop-down list.

- 6 To format spacing within the cell, click Additional Formatting Options and specify values for the width and height of the cell contents, and the space above, below, left and right of the contents.

Values are specified in pixels.

- 7 To override the style and class elements specified in Siebel CRM On Demand Answers style sheets, make your selections in the Custom CSS Style Options area:

- a Click the settings that you want to use.
- b Provide the location of the class, style, or style sheet.

**NOTE:** The advanced style formatting options are for users who know how to work with cascading style sheets.

- 8 Click OK.

## Renaming Dashboard Objects

Dashboard objects on an interactive dashboard that do not already have a name are assigned a default name, such as Section 1, Link 1, and so on. You can rename dashboard objects to assign meaningful and descriptive names.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

### *To rename a dashboard object on an interactive dashboard page*

- 1 Navigate to the dashboard editor.  
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).
- 2 In the Dashboard Editor page, click the Rename button for the dashboard object.
- 3 In the Rename dialog box, enter a new name for the dashboard object.
- 4 Click OK.

## Deleting Dashboard Objects

You can delete dashboard objects from interactive dashboard pages. If the dashboard object that you delete is already saved in the CRM On Demand Presentation Catalog, the object is deleted from the dashboard page only. It is not deleted from the Presentation Catalog. (Note that users with the appropriate permissions can edit the contents of the Presentation Catalog by clicking Manage on the Catalog tab in the selection pane in CRM On Demand Answers.)

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

*To delete a dashboard object from an interactive dashboard page*

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).

- 2 In the Dashboard Editor page, click Delete for the dashboard object.

**NOTE:** When you delete a column, the other columns on the page might resize automatically to maintain the column alignment.

## Changing the Properties of Interactive Dashboards

You can set the properties for the entire dashboard, such as the style to use, and you can delete, reorder, and hide pages. Changing the dashboard properties automatically saves any changes you made to the page that you were working on.

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

*To access the Dashboard Properties page for an interactive dashboard*

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).

- 2 Click the Dashboard Properties icon near the top of the Dashboard Editor page.



The Dashboard Properties page appears.

## Selecting a Style for an Interactive Dashboard

Styles control how dashboards and results are formatted for display. Initially, results are formatted using a default style. CRM On Demand provides predefined styles that you can choose from.

*To select a style for an interactive dashboard*

- In the General Properties area of the Dashboard Properties page, select the style that you want to use from the Style drop-down list.

### Adding a Description for an Interactive Dashboard

Descriptions are stored but do not appear on the dashboards.

#### *To add a description for an interactive dashboard*

- Enter a description for the dashboard in the Description box on the Dashboard Properties page.

### Renaming, Deleting, Reordering, and Hiding Interactive Dashboard Pages

This topic provides procedures that describe how to rename, delete, reorder, and hide interactive dashboard pages. The Dashboard Pages area of the Dashboard Properties page shows you the pages for the dashboard. The pages are listed in the same order as their tabs.

When you rename a dashboard you can preserve users' references to the old name. This action creates a shortcut with the old name that points to the renamed dashboard in the Presentation Catalog.

If you are working with a dashboard page, you can hide it from users until your changes are complete.

**CAUTION:** You cannot undo the actions described in the following procedures by clicking Cancel.

#### *To rename an interactive dashboard page*

- In the Dashboard Pages section of the Dashboard Properties page, click the Rename icon to open the Rename Item page, and follow the instructions given on that page.

#### *To delete an interactive dashboard page*

- In the Dashboard Pages section of the Dashboard Properties page, click the Delete icon, and confirm the deletion when prompted.

#### *To reorder an interactive dashboard page*

- To move a dashboard page up in the list, click the up arrow for the page in the Dashboard Pages section of the Dashboard Properties page.

On the dashboard, the tab for the page moves to the left.

- To move a dashboard page down in the list, click the down arrow for the page in the Dashboard Pages section of the Dashboard Properties page.

On the dashboard, the tab for the page moves to the right.

***To hide an interactive dashboard page***

- In the Dashboard Pages section of the Dashboard Properties page, select the Hide Page check box for the page.

The page remains visible to any users currently viewing it.

**NOTE:** You cannot change the permissions on a dashboard page. The Security icon in the Dashboard Pages section of the Dashboard Properties page is disabled.

## Changing PDF and Printing Options on Interactive Dashboards

You can specify the page settings and header and footer content for the PDF output from an interactive dashboard. Dashboards and views are printed in Adobe Acrobat PDF format. Adobe Reader 6.0 or greater is required to print using Adobe PDF.

Header and footer formatting appear in HTML and PDF output.

**NOTE:** The print selections that you specify apply to PDF output only. If you print the PDF on a local or network printer, the print selections specified in your browser are in effect, such as the selection for paper size.

***To change PDF and print options***

- 1 Navigate to the dashboard editor.

For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).

- 2 Click the PDF and Print Control Properties icon near the top of the workspace.



The PDF and Print Control dialog box appears.

- 3 Make your selections for the page settings.
- 4 To add a header or footer, select the appropriate option, and click Edit.
- 5 Use the options in the dialog box to construct the header or footer.  
Headers and footers can each contain up to three lines.
- 6 To apply cosmetic formatting to a header or footer element, click Cosmetic Formatting.  
The common formatting dialog box appears. For more information on cosmetic formatting, see [Applying Formatting to Interactive Dashboards](#) (on page 515).
- 7 When you are finished, click OK.

## Creating Prompts for Interactive Dashboards

A dashboard prompt filters the results of the embedded requests to show only the results that match the prompt criteria. A dashboard prompt can filter all the requests embedded in a dashboard or requests on certain dashboard pages only.

You select the columns and operators for the dashboard prompt, and specify how the prompt appears on the dashboard and how users select the values. The user's selections determine the content of the reports embedded in the dashboard or dashboard page. Every column contained in the dashboard prompt must be contained, in the projection list or in the filter, in each request that you want the prompt to filter. The columns in the request must have the filters set, or the filter condition has to be set to Is Prompted. Columns contained in the prompt that are not included in the request will not filter the request.

If you include multiple columns in a dashboard prompt, you can constrain users' choices for the subsequent selections. For example, suppose one column filters on Region, and the next column filters on District. By selecting the Constrain check box for District, you can constrain the District column to show only districts consistent with the user's selection for Region. If the user chooses the east region from the Region prompt, the District prompt shows the districts in the east region only.

**NOTE:** The constrained columns are constrained by all the other columns in the prompt. For example, if the prompt contains columns for Year, Region, and District, and Constrain is checked for District, the values shown in District are limited by the values entered in Region and Year.

If you declare a presentation variable in a dashboard prompt, the variable can also be referenced in various areas of a report. The value entered at the dashboard prompt can then be displayed (using the presentation variable) in request results displayed in the dashboard.

After you create a dashboard prompt, save it in a shared folder. After you save a dashboard prompt, you can add it to a dashboard.

**Before you begin.** To create and edit prompts for interactive dashboards, your role must include the Manage Dashboards privilege.

### *To create a prompt for an interactive dashboard*

- 1 Click the Reports tab.
- 2 Click the Design Analyses link.  
CRM On Demand Answers is displayed in a separate window.
- 3 In the CRM On Demand Answers window, click any subject area, then click the New Dashboard Prompt icon at the top of the section.  
A list of subject areas is displayed.



- 4 From the list of subject areas, select the subject area that contains the column that you want to use as the filter.

The Dashboard Prompt page appears.

**NOTE:** If the column is also included in a column filter prompt in an embedded request, its value must be set to a filter in the Create/Edit Filter dialog box in order for the dashboard prompt to filter the embedded request. Setting the value to Is Prompted will not prefilter the current column. All columns in a dashboard prompt must come from the same subject area, and all columns in the dashboard prompt must be included in the embedded requests that you want the dashboard prompt to filter.

- 5 In the Scope drop-down list on the Dashboard Prompt page, specify whether the dashboard prompt applies to the entire dashboard or a dashboard page.
- 6 To select a column to use as a filter in the dashboard prompt, click the column name in the selection pane.

You can add multiple columns to a dashboard prompt. If you want to remove a column from the prompt, click Delete for that column.

**NOTE:** The number of columns that you include in a dashboard prompt can affect performance. For example, columns that show values in a drop-down list require a request to the CRM On Demand server to populate the list. It is recommended that you limit the number of columns to nine or less.

- 7 Make your selections for the following options:
  - a Click Edit Formula to display the Edit Column Formula dialog box where you can modify the formula for the column.
  - b Select the operator that you want to use from the Operator drop-down list.
  - c Select the Control type to indicate how users select the value for the filter.

The choices are to select the value from a calendar, a drop-down list, or a multiple list of values, or type it into an edit box.
  - d If you choose a drop-down list, then, in the Show list, indicate which values you want to appear in the drop-down list.

You can show all values or develop an SQL statement to limit the drop-down list to certain values.
  - e To constrain the choices for a column depending on the selection the user makes from the previous column, select the Constrain check box.
  - f In the Default to list, choose the value that you want users to see initially.

You can show the report defaults, all choices, or a specific value. If you select a specific value, a field appears in which you can type the value.

- g** In the Set Variable list, you can choose whether to populate a variable for the dashboard prompt using a server request variable or a presentation variable. Leave the field blank if you do not want to declare a variable name for this prompt.

If you choose either Server or Presentation to declare a variable for this prompt, an additional field appears where you declare the variable name.

If you set a server variable it will override explicitly the value of this variable set using the initialization block.

For example, if you choose Presentation from the drop-down list, you might type myFavoriteRegion to declare this as a presentation variable. A variable declared here can be referenced in requests when viewed in a dashboard.

- h** In the Label box, type a name to use for the filter label.

If you leave the Label box empty, the column label is used as the filter label.

- 8** To reorder columns in the prompt, click Order By.

This action controls the order in which the selections appear to users.

- 9** If you want the selected prompt and all other prompts that follow it to appear on a new line in the filter, click the box in the Group list.

- 10** To preview how the prompt will appear on the dashboard, click Preview (if available).

### *To save a prompt for an interactive dashboard*

- 1** When you have finished creating the dashboard prompt, click Save.

- 2** At the Choose Folder dialog box, save the dashboard prompt to a shared folder, and give the dashboard prompt a descriptive name.

You might also want to indicate in the name whether the dashboard prompt is for an entire dashboard or for a dashboard page.

**NOTE:** If you save a dashboard prompt in a personal folder, you cannot add the prompt to a dashboard until you move it to a shared folder.

- 3** (Optional) Type a description in the Description box.

### *To edit a prompt for an interactive dashboard*

- 1** Click the Reports tab.

- 2** Click the Design Analyses link.

CRM On Demand Answers is displayed in a separate window.

- 3** In the CRM On Demand Answers window, click the Open Analysis link, and locate the prompt in the folder in which it was saved.

- 4** Click the dashboard prompt to edit it.

*To add a prompt to an interactive dashboard or dashboard page*

- 1 Navigate to the dashboard editor.  
For information on navigating to the dashboard editor, see [Navigating to the Dashboard Editor](#) (on page 504).
- 2 From the selection pane on the Dashboard Editor page, in the Saved Content area, navigate to the folder containing the dashboard prompt that you want to add.
- 3 Drag and drop the dashboard prompt into a section in the dashboard page.  
If the dashboard prompt's scope is set to Dashboard, the dashboard prompt affects every page of the dashboard, but does not appear on every dashboard page. If the dashboard prompt's scope is set to Page, the dashboard prompt affects only the pages to which you add it. If a dashboard prompt's scope is set to Dashboard, the value selected for the dashboard level prompt overrides the values for the page level dashboard prompts.

## Changing the Name or Description of an Interactive Dashboard

**Before you begin.** To create and edit interactive dashboards, your role must include the Manage Dashboards privilege.

*To change the name or description of an interactive dashboard*

- 1 Click the Dashboard tab.
- 2 On the Dashboard page, click the Manage Dashboards link.
- 3 On the Manage Dashboards page, click the edit link of the dashboard that you want to change.
- 4 On the Dashboard Edit page, change the name or description as needed, then click Save.

## Viewing Dashboards

CRM On Demand provides a number of prebuilt dashboards, which group reports into business areas. In addition, users whose role has the Manage Dashboards privilege can create interactive dashboards.

This topic describes how to view prebuilt and interactive dashboards.

**NOTE:** If your role does not allow you to view a certain report on a dashboard, or if a report was deleted after it was added to the dashboard, you see an error message on the dashboard where the report would have been displayed.

### *To view a dashboard*

- 1 Click the Dashboard tab.
- 2 In the Select Dashboard drop-down list, select the dashboard that you want to view.
- 3 Click Show.  
The dashboard appears.

### Related Topics

Steps for Dashboards 501

## About Guided Navigation in Interactive Dashboards

Guided navigation can help users to understand business issues and to determine the appropriate actions that they should take, by guiding their exploration of the results obtained from reports. When guided navigation is based on common scenarios and best practices for your industry or organization, it allows users to see and analyze related issues by navigating to a related set of results, another dashboard, or a URL. Guided navigation is specified using the dashboard editor in CRM On Demand Answers.

There are three types of guided navigation:

- Guided navigation using static links. When specified for a request, the results on the dashboard always include a link to another request, a dashboard, or URL. For example, a report that shows trends in gaps in customer satisfaction can always appear with a link to a report that shows customer satisfaction by product line.
- Guided navigation using conditional links. When specified for a request, a link to another request, dashboard, or URL appears only if the results meet certain criteria. For example, if the number of open critical service requests exceeds a certain threshold, the result set can include a link to a report that shows customer satisfaction by employee.
- Guided navigation using conditional sections. Entire dashboard sections can appear based upon the results returned for a particular request. For example, if the results show that sales are down by 15 percent or greater in the past week, a dashboard section that contains links to the related reports and tools can appear.

The display of static links does not generally affect the dashboard rendering time. The display of numerous conditional links or sections can affect the dashboard rendering time. For information about the dashboard editor, see [Adding and Displaying Content on Interactive Dashboard Pages](#) (on page 503).

# 22 Administering Siebel CRM On Demand

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Use the Administrator pages to set up and customize Siebel CRM On Demand. For instructions, see these sections:

This section	Describes these tasks
<a href="#">Company Administration</a> (on page 528)	<a href="#">Setting Up Your Company Profile and Global Defaults</a> (on page 529) <a href="#">Activating Languages</a> (on page 536) <a href="#">Verifying License Statuses and Active Users</a> (on page 536) <a href="#">Defining Your Company's Password Controls</a> (on page 538) <a href="#">Resetting All Passwords</a> (on page 541) <a href="#">Reviewing Sign-In Activity for a User</a> (on page 620) <a href="#">Restricting Use to IP Addresses</a> (on page 542) <a href="#">Reviewing Your Company's Resource Usage</a> (on page 543) <a href="#">Publishing Company-Wide Alerts</a> (on page 544) <a href="#">Managing Currencies</a> (on page 546)
<a href="#">Application Customization</a> (on page 549)	<b>Tasks for Record Type Setup</b> <a href="#">Creating and Editing Fields</a> (on page 559) <a href="#">Setting Up Custom Field Integration Tags</a> (on page 562) <a href="#">Setting Up Web Links</a> (on page 563) <a href="#">Renaming Fields</a> (on page 565) <a href="#">Using Indexed Custom Fields</a> (on page 566) <a href="#">Reverting Settings to Defaults</a> (on page 568) <a href="#">Changing Picklist Values</a> (on page 568) <a href="#">Customizing Static Page Layouts</a> (on page 570)

This section	Describes these tasks
	<a href="#">Renaming Field Section Titles</a> (on page 573) <a href="#">Creating Web Applets</a> (on page 574) <a href="#">Defining Cascading Picklists</a> (on page 575) <a href="#">Managing Search Layouts</a> (on page 576) <a href="#">Managing List Access and List Order</a> (on page 578) <a href="#">Creating Homepage Custom Reports</a> (on page 579) <a href="#">Creating Record Homepage Layouts</a> (on page 580) <a href="#">Customizing the Audit Trail</a> (on page 581) <a href="#">Specifying Dynamic Page Layouts</a> (on page 583) <a href="#">Managing the Behavior of Lookup Windows</a> (on page 585) <b>Tasks for Application Setup</b> <a href="#">Displaying External Web Pages in Tabs</a> (on page 586) <a href="#">Creating Global Web Applets</a> (on page 593) <a href="#">Customizing My Homepage for Your Company</a> (on page 594) <a href="#">Enabling Custom Reports in My Homepage</a> (on page 595) <a href="#">Renaming Record Types</a> (on page 596) <a href="#">Changing the Icon for a Record Type</a> (on page 598) <a href="#">Adding Record Types</a> (on page 598)
<a href="#">User Management and Access Controls</a> (on page 601)	<a href="#">Setting Up Access Profiles</a> (on page 606) <a href="#">Adding Roles</a> (on page 608) <a href="#">Setting Up Users</a> (on page 611) <a href="#">Setting Up Users' Sales Quotas</a> (on page 617) <a href="#">Changing a User's User ID</a> (on page 618) <a href="#">Resetting a User's Password</a> (on page 619) <a href="#">Reviewing Sign-In Activity for a User</a> (on page 620) <a href="#">Deactivating Users</a> (on page 620) <a href="#">Setting Up Groups</a> (on page 621) <a href="#">Setting Up Territories</a> (on page 623) <a href="#">Setting Up Books</a> (on page 626)

This section	Describes these tasks
<a href="#">Business Process Management</a> (on page 632)	<a href="#">Setting Up Assignment Rules</a> (on page 636) <a href="#">Mapping Additional Fields During Lead Conversion</a> (on page 642) <a href="#">Setting Up Forecast Generation</a> (on page 643) <a href="#">Setting Up Sales Processes, Categories, and Coaches</a> (on page 647) <a href="#">Customizing Your Company's Industry List</a> (on page 655) <a href="#">Creating Workflow Rules</a> (on page 661) <a href="#">Creating Workflow Rule Actions</a> (on page 663) <a href="#">Changing the Order of Workflow Rule Actions</a> (on page 667)
<a href="#">Data Management Tools</a> (on page 668)	<a href="#">Preparing for Data Importing</a> (on page 670) <a href="#">Linking Records During Import</a> (on page 672) <a href="#">Importing Your Data</a> (on page 749) <a href="#">Reviewing Import Results</a> (on page 753) <a href="#">Exporting Your Company's Data</a> (on page 759) <a href="#">Reviewing Export Results</a> (on page 761) <a href="#">Managing Integration Event Settings</a> (on page 765)
<a href="#">Content Management</a> (on page 765)	<a href="#">Setting Up Product Categories</a> (on page 766) <a href="#">Setting Up Company Products</a> (on page 767) <a href="#">Managing Your Company's Attachments</a> (on page 769) <a href="#">Setting Up Assessment Scripts</a> (on page 770) <a href="#">Setting Up Report Folders</a> (on page 364)
<a href="#">Web Services Integration</a> (on page 777)	<a href="#">Downloading WSDL and Schema Files</a> (on page 777) <a href="#">Reviewing Web Services Utilization</a> (on page 779)
Smart Call Management	<a href="#">Managing Smart Calls</a> (on page 780)

Additionally, administrators can usually do the following:

- Create custom reports for their own use or for company-wide distribution. For instructions, see [About Reports](#) (on page 362).
- Create filtered lists for company-wide distribution. For instructions, see [Working with Lists](#) (on page 56).

For information about using the Siebel Query Language Expression Builder, see [Creating Expressions with Expression Builder](#) (on page 781).

## Using Administrator Templates During Setup

You can download administrator setup templates to help you organize your company's information and implement Siebel CRM On Demand effectively and efficiently.

After you have entered your information, you can use the Excel spreadsheets as a reference during setup and customization of the application.

### *To access administrator setup templates*

- 1 Click the link for the template you want.  
Links are visible in this topic within the online help.
- 2 In the File Download dialog box, click the Save button to save the template to your computer.
- 3 Open the saved file.

## Company Administration

**Before you begin.** Unless otherwise indicated, to perform the procedures described in the Company Administration section, your role must include the Administer Company Profile privilege.

Click a topic to see step-by-step instructions for the procedures pertaining to Company Administration:

- [Setting Up Your Company Profile and Global Defaults](#) (on page 529)
- [Activating Languages](#) (on page 536)
- [Verifying License Statuses and Active Users](#) (on page 536)
- [Defining Your Company Password Controls](#) (see "Defining Your Company's Password Controls" on page 538)



- [Resetting All Passwords](#) (on page 541)
- [Reviewing Sign-In Activity for All Users](#) (see "Reviewing Sign-In Activity for a User" on page 620)
- [Restricting Use to IP Addresses](#) (on page 542)
- [Reviewing Your Company's Resource Usage](#) (on page 543)
- [Publishing Company-Wide Alerts](#) (on page 544)
- [Managing Currencies](#) (on page 546)

## Setting Up Your Company Profile and Global Defaults

Both company information and global defaults are set through the Company Profile page.

**Company Information.** You can enter or edit your company name, addresses for shipping and billing, phone number, and primary contact. If you signed up for a trial period, some information about your company is carried over from your sign-up data.

**Global Defaults.** You can define your company-wide defaults, which users can override.

**CAUTION:** The company administrator can change the Country setting. If you change the Country setting, notify Customer Care so that it can take the necessary steps to update your Time Zone setting, as well as your reports and dashboards. Language, Currency, and Time Zone can only be changed by contacting Customer Care.

**Before you begin.** To understand the effect of these settings, read [About Profile Settings for Users](#) (on page 310). To perform this procedure, your role must include the Administer Company Profile privilege.

### *To edit your company profile*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 On the Company Profile page, click the Edit button and make changes.

**5** Save the record.

This table describes some of the fields that appear.

Field	Description
<b>Company Key Information</b>	
Company Sign-in ID	A unique identifier for your company. When creating new users this is the first portion of the User Sign In Id (Company Sign In ID/User ID) for the user.
Primary Contact	Defaults to ADMIN or the alias of the first user from your company who signs in, but can be changed to any user. Product update and other important information is sent to the primary contact.
<b>Company Settings</b>	
Default Language	<p>The language used as the default for your users. You can activate additional languages so that users can change the setting for their own use. For information on how to add languages, see <a href="#">Activating Languages</a> (on page 536).</p> <p>To update this field, contact Customer Care.</p>
Default Locale	The regional settings used as a default for your users. Users can change the setting for their own use at any time from the User Profile page. These settings determine the formatting for dates, time, currency, numbers, and phone numbers.
Default Currency	<p>The currency used as a default for your users. You can activate additional currencies so that users can change the setting for their own use (see <a href="#">Managing Currencies</a> (on page 546)). However, the currency set here determines the default currency used for forecasts, which are company-wide.</p> <p>To update this field, contact Customer Care.</p>
Default Time Zone	<p>Default time zone for your company.</p> <p>Some functions, such as forecast generation, use the time zone of the hosting facility instead of this default time zone. Contact Customer Care to find out this time zone. Users in other regions can choose to use their local time zone, which is set on the User Profile page</p> <p>To update this field, contact Customer Care.</p>

Field	Description
Global Search Method	<p>Select which search method you want to make available to your users in the Search box in the action bar:</p> <ul style="list-style-type: none"> <li>■ <b>Targeted Search.</b> Searches certain fields to find matches, which the system displays in the Search box. This is the default setting provided with the application.</li> </ul> <p>When a user enters values in several fields, it acts as an “and” condition. The system displays the records with fields that match the beginning values of all words within the text box. If wild cards are used, the application does a substring match.</p> <ul style="list-style-type: none"> <li>■ <b>Keyword Search.</b> Searches records on the default fields specific to each record type. This allows the user to type in anything within the single text box with each word containing wild cards. This search may impact performance.</li> </ul> <p>When a user enters a value in the single box, it acts as an “or” condition. The system displays the records with a matching value in any of the default search fields.</p> <p>For more information, see <a href="#">Finding Records</a> (on page 35).</p>
Fiscal Year Begins	<p>This field is initially set when your company is created and cannot be changed by the company administrator.</p> <p>This setting affects reports that measure revenue against your fiscal year.</p> <p>To update this field, contact Customer Care.</p>
Product Probability Averaging Enabled	<p>Determines how the opportunity probability is updated when the user clicks the Update Opportunity Totals button:</p> <ul style="list-style-type: none"> <li>■ If selected, the opportunity probability is calculated based on the weighted average of probability for each of the linked products:</li> </ul> $\text{Opportunity Probability} = \text{SUM}(\text{Product Expected Revenue}) / \text{SUM}(\text{Product Revenue})$ <ul style="list-style-type: none"> <li>■ If not selected, the probability is not updated as part of the action.</li> </ul> <p><b>NOTE:</b> The Update Opportunity Totals button is located on the Opportunity Detail page, in the title bar in the Products related information section.</p>
Inline Edit Enabled	Enables or disables the inline editing feature.
Max # of Auditable Fields	Maximum number of auditable fields, which is shown as a read-only field.

Field	Description
Message Center Enabled	Controls whether: <ul style="list-style-type: none"> <li>■ The Message Center appears in the Action bar.</li> <li>■ The Notes icon and list of notes is available in Record detail pages</li> <li>■ Users can use the Message Center widget</li> </ul>
<b>Company Theme Setting</b>	
Theme Name	<p>You set up the default theme by clicking the Theme Name drop-down list and then selecting the theme that you want. The theme name determines the look-and-feel of the application.</p> <p><b>NOTE:</b> The default theme for new users is contemporary and the default theme for existing users is classic. Users can override this default in the Personal Profile. Your choice of theme has no effect on how the application behaves. Contact Customer Care if you want to suggest other themes or if you want to submit your own themes to use in the application.</p>
<b>Company Data Visibility Settings</b>	
Manager Visibility Enabled	Select this option to allow managers to see the records of the users that report to them. A user's manager is determined by the Reports To field on the User Detail page.
Default Group Assignment	Select this option to allow group members to share ownership of tasks, accounts, contacts, and opportunities. For more information, see <a href="#">Setting Up Groups</a> (on page 621).
Display Look In Selector	Enables or disables the Look in selector which is used to narrow searches on records to particular books.
Book Enabled	<p>Controls whether the Look in selector displays books. If this check box is not enabled, the selector displays only users (and delegates, if they exist).</p> <p><b>CAUTION:</b> Do not select the Book Enabled option until you have created your book hierarchy. You cannot deselect this option after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.</p>
<b>Integration Settings</b>	
Allow Bulk Data Load	Allows a Customer Care agent or an Oracle consultant for your Siebel CRM to import large amounts of data for your company. Only a company administrator can select this option.

Field	Description
Allow Bulk Data Load Expiry Date	Sets an expiration date for allowing a Customer Care agent or an Oracle consultant for your Siebel CRM to import large amounts of data for your company. Only a company administrator can set this option.
Workflow Enabled	If your company has been set up to allow workflow, this setting is displayed. This setting can be activated once you have created the workflow conditions you want to deploy.
<b>Company Security Settings</b>	
Company Idle Timeout (minutes)	Time allowed before the user's session ends due to inactivity. The maximum timeout is set by the hosting partner, and only Customer Care can set the timeout value. You can see the current setting at the top of the page when you edit the Company Profile.
Authentication Type	<p>Displays which authentication types are allowed for your company. This value can only be assigned by Customer Care. The following values are possible:</p> <ul style="list-style-type: none"> <li>■ User ID/Password Only - All users must sign in using their CRM On Demand User ID and password.</li> <li>■ Single Sign-On Only - All users must sign in using your company's single sign-on mechanism. CRM On Demand User IDs and passwords are not accepted.</li> <li>■ User ID/PWD or Single Sign-On - Either CRM On Demand User ID and password or single sign-on may be used to sign in to CRM On Demand.</li> </ul> <p>Authentication Type can be set per-user by the company administrator, on the User Profile page. If the user's value is blank, then the company-level setting is used for that user.</p>
External Identifier for Single Sign-On	Unique company identifier assigned by Customer Care when Single Sign-On is configured for the company. This value cannot be changed by the company administrator, although External Identifiers may be set for each user on the User Profile page.
Sign In Page for UserID/Pwd Authentications	<p>URL to a company-specific custom Sign In page, which replaces the default Siebel CRM On Demand Sign In page. Typically, the page is hosted on a company Web server. The URL must be fully qualified - (the URL must begin with http:// or https://).</p> <p>This page is displayed after a user signs out or the user's session ends because of inactivity. It is the company's responsibility to direct their users to initially sign in using this page rather than the default CRM On Demand page.</p>

Field	Description
Sign In Page for SSO Authentications	<p>URL to a company-specific custom Sign In page that is displayed after a user signs out or the user's session ends due to inactivity, if the user originally signed into CRM On Demand using Single Sign-On. Typically, the page is hosted on a company Web server - for example the company's Single Sign-On portal. The URL must be fully qualified (begin with http:// or https://).</p> <p>It is the company's responsibility to direct users to initially sign in using their SSO Sign In page, rather than the default CRM On Demand page. If a user who has signed in using SSO signs out and this setting is blank, a generic page is displayed with the message "You have been signed out."</p>
ITS URL for SSO Authentications	SAML Intersite Transfer Service URL that is used for Single Sign-On to Siebel CRM On Demand, assigned by Customer Care when Single Sign-On is configured for the company. This value cannot be changed by the company administrator.
IP Address Restrictions Enabled	See <a href="#">Restricting Use to IP Addresses</a> (on page 542).
Alternate PIM Sync Download URL	This setting is rarely used. If your company is using a custom PIM Sync client or created the installation rather than the standard CRM On Demand PIM Sync client, set this value to the URL for your custom client download. The URL should be fully-qualified (it should begin with http://).
Disable Access to PIM Sync Download Page	Select this option to prevent users from downloading PIM Sync from within the product and to use the alternate download URL.
Disable PIM Sync Extended Account Association	When this option is selected, Siebel PIM Sync On Demand does an exact link of contacts with accounts in CRM On Demand.
Disable PIM Sync Account Association	Select this option to disable PIM Sync Account Matching. When the flag is set, the PIM's Company field is mapped to the PIM Company Name field on the On Demand Contact record, and standard account matching methods are bypassed.

Field	Description
<b>Analytics Visibility Setting</b>	
Reporting Subject Areas	<p>Use this picklist to set the visibility for users who want to view real-time report records in Siebel CRM On Demand Answers. These reports provide real-time analyses of data. You can select one of the following values:</p> <p>Manager Visibility - Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows users to view their own data, and data shared with them by their Account and Opportunity teams.</p> <p>This company-wide setting applies unless users set a value for the Reporting Subject Areas setting in their Personal Detail page. For more information on reports, see <a href="#">About Reports</a> (on page 362), particularly the About Visibility to Records in Reports section.</p>
Historical Subject Areas	<p>Use this picklist to set the visibility for users who want to view analytics report records in Siebel CRM On Demand Answers. These reports provide historical or trend analyses, or contain more complex calculations than those found in real-time reports. You can select one of the following values:</p> <p>Manager Visibility - Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.)</p> <p>Team Visibility - Allows users to view their own data, and data shared with them by the Account and Opportunity teams.</p> <p>Full Visibility - This setting combines the views of Manager and Team Visibility.</p> <p>This company-wide setting applies unless users set a value for the Historical Subject Areas setting in their personal details. For more information on reports, see <a href="#">About Reports</a> (on page 362), particularly the About Visibility to Records in Reports section.</p>
<b>Additional Information</b>	
Licensed Users, Active Users, Inactive Users	These numbers are read-only, displaying your licensed number of users along with the current status of users.

**NOTE:** Some additional fields might appear if your company has certain features turned on.

## Activating Languages

Siebel CRM On Demand is available in several languages. All default text fields supplied with the product, such as fields and picklist values, along with online help and tutorials are shown in the available languages.

However, when you customize fields or picklist values, you must manually enter the equivalents in other languages, if you want those to appear in their translated versions. Otherwise, they appear in the original language in blue text with brackets around them, regardless of the language you selected.

Initially, the only active language is the one that was selected as the company default language when your company signed up for Siebel CRM On Demand.

To make the language choices available to your users, you must activate them.

**Before you begin.** To perform this procedure, your role must include the Administer Company Profile privilege.

### *To activate languages*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Company Administration link.
- 3 In the Company Profile section, click the Languages link.
- 4 In the Active column, select the languages you want to make available to your employees.  
**NOTE:** The formats for displaying dates, times, and currency are determined by other settings, not the Language setting.
- 5 Save the record.

## Verifying License Statuses and Active Users

You can verify the license status and compare that to the number of active users. You need a license for each active user. (An *active user* is a user who can access the application.)

The number of licenses also determines the amount of data that the application can store for your company.

**Before you begin.** To perform this procedure, your role must include the Manage Company privilege.

### *To verify your license status and active and inactive users*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.



- 3 In the Company Profile section, click the Company Profile link.
- 4 In the Additional Information section on the Company Profile page, verify the numbers of licensed, active, and inactive users.
  - If you have active users who no longer need access to the application, you can free up licenses by deactivating them.
  - If you need to purchase more licenses, please contact your Siebel CRM On Demand sales representative.

## About Sign-in and Password Policies

Siebel CRM On Demand provides the highest levels of security for your company. Security constraints have been built in to ensure that only authorized users have access to your data.

Additionally you can enforce certain sign-in, password, and authentication policies to raise the level of security within your company. For example, you can set the sign-in timeout to 15 minutes to better adhere to your corporate security policies. And if any of your users forget their password, they can receive a new one by simply answering a set of validation questions.

### Security Considerations

- Before you set up your sign-in and password controls, you need to carefully consider your security needs. Some of the questions you should answer are:
  - What type of user ID do you want to use?
  - How long do you want a user's system-generated temporary password to be valid for?
  - What will be the maximum number of sign-in attempts that is allowed before a user is locked out of the application?
  - How long will the sign-in lockout be for? How often do you want users to change their passwords?
  - Do new passwords have to be different from old passwords?
  - What is the minimum password length?
  - How many security questions must be completed by each user to enable the Forgot Password feature?
  - How many security questions must be answered correctly before the application automatically resets a user's password?
  - Do you want to allow users to change their user IDs or email addresses?

When you have defined your sign-in and password policies, you can implement them in the Company Administration pages in the application.

## Password Setting Changes

If you make changes to the password settings, the system does not enforce the changes until the current passwords expire. For example, if you change the minimum password length from seven characters to 10 and a user already has a seven character password, the user can use the seven character password until it expires. At that time, the user will have to create a new password of at least 10 characters.

It is best to set the internal policy and select the settings before adding new users to the system. If, however, you must make a change to your security policy immediately, you have the ability to reset all user passwords. This action generates an email to all the users in your company providing them with a new temporary password. You must have the Reset Passwords privilege to do this.

## Forgot Your Password Feature

You must define the minimum number of security questions and answers that users must provide to have their passwords reset. Each user must complete the setup of this feature by selecting the required number of security questions and entering the answers to the questions. When this feature is set up, users are able to reset their own CRM On Demand passwords without the company administrator intervening.

## Defining Your Company's Password Controls

You can define the application's password policy. For example, you can set the application's password policy to conform to your company's protocols about how long passwords should be and how often they should expire.

### *To define your company password controls*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Sign In and Password Control link.
- 4 On the Company Sign In and Password Control page, fill in the information, and then save the settings.

The following table describes the settings.

**NOTE:** Only users whose roles include the Change Password privilege can use the Forgot Your Password feature. The users must also have security questions and answers set up in the system.

Setting	Possible Values	Usage
<b>Sign-in Policy Information</b>		
Company Sign-in ID	Text box	Is a unique identifier for your company. When creating new users this identifier will be the first portion of the User Sign In Id (Company Sign-in ID) for the user. When new users are created and the Default User ID Type is Company Sign-in ID, the Company Domain part of the user ID is prepopulated with this value. This setting can also be accessed from the Company Profile page.
Maximum Number of Sign In Attempts	3, 5, or 10 attempts	The maximum number of failed sign-in attempts that are allowed before the user's account is locked.
Sign In Lockout Duration	15, 30, 60 minutes or Forever	The length of time that the user's account is locked.
<b>Password Control Information</b>		
Expire User Passwords In	30, 60, 90 days, one year, or never expires	The length of time that a user's password is valid. After this period has elapsed, the user is forced to change the password.
Minimum Password Length	Number between 6 and 10	The minimum number of characters that can be used for a password.
Maximum Number of Password Changes	Number between 1 and 20	The maximum number of times that a user's password can be changed as specified in the Password Change Limit Window setting. If a user attempts to change a password more than the specified number of times, the change is not allowed.
Password Change Limit Window	Number of days (from 1 to 7)	The period during which the Maximum Number of Password Changes setting applies.

Setting	Possible Values	Usage
Your New Password Must Be Different Than Your Old Password	Check box	Applies when a user changes his or her password.
<b>Authentication Information</b>		
Number Of Security Questions To Be Completed	Number between 1 and 8	To use the Forgot Your Password feature, a user must select and answer the specified number of security questions. The user's questions and answers are stored for future use.
Number Of Security Questions To Be Answered	Number between 1 and 8	This setting applies to the number of questions and answers the user has set up for the Forgot Your Password feature. When the user clicks the link, Forgot Your Password?, on the Sign In page, the user receives an email, shortly afterwards, with a link to a temporary page. On the temporary page, the user must answer the number of security questions based on this value before the password can be reset. You can set a larger number of questions to be completed than are required to be answered. A random selection of the completed questions is displayed to authenticate a user.
Number Of Days Temporary Sign In Is Valid	Number of days (1 to 14)	This setting determines the number of days that a temporary sign-in password is valid. An email with temporary sign-in information is typically sent when a new user is added, or when the company administrator or Customer Care resets the user's password.

Setting	Possible Values	Usage
Number Of Temporary Password Sign In Attempts	Number of attempts (1 to 14)	The total number of sign-in attempts allowed using a temporary sign-in password. If this value is exceeded, the user's temporary sign in information becomes invalid, and the user must have the password reset again.
<b>Additional Information</b>		
Allow Users To Change User ID	Check box	If the check box is selected, users who edit their User Profile can change their User ID. If the feature is not enabled, only the company administrator can change the user IDs.
Allow Users To Change Email Address	Check box	If this check box is selected, users who edit their user profile can change their email address. If this feature is not enabled, only the company administrator can change the email addresses.

## Resetting All Passwords

You can reset all users' passwords (including the administrator's) at one time.

**Usage example 1.** When you are setting up your application, create users and set their Status to Active, but don't email their passwords to them. After the setup is completed and the application is ready for use, reset all passwords. This action sends emails to all active users at once, notifying them of their temporary passwords and giving them access to the application.

**Usage example 2.** You have changed your password control policy and want all users to conform to the new policy. Reset all passwords so that the users must change their passwords when they next sign in.

**Before you begin.** To perform this procedure, your role must include the Administer Company Profile or Reset Passwords privilege.

### *To reset all passwords*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.

**3** In the Company Profile section, click the Company Profile link.

**4** In the Company Profile title bar, click the Reset All Passwords button.

Emails are sent to all the users, notifying them of their new temporary passwords. Users currently signed in are able to continue working but will need to enter their new temporary passwords when they next sign in.

### Related Topics

Resetting a User's Password 619

Setting Up Users 611

Defining Your Company's Password Controls 538

## Reviewing Sign-In Activity for All Users

You can review the sign-in history for all the users at your company. The sign-in history page shows which of your users are using the application and when. The sign-in history page also records sign-in activity by Siebel CRM On Demand Customer Care.

**Before you begin.** To perform this procedure, your role must include the Administer Company Profile privilege.

### *To review sign-in activity for all users*

**1** In the upper right corner of any page, click the Admin global link.

**2** In the Company Administration section, click the Company Administration link.

**3** In the Resource Audit section, click the Sign-in Audit link.

**4** Review the sign-in history for the application.

### Related Topics

Reviewing Sign-In Activity for a User 620

## Restricting Use to IP Addresses

This feature allows your company to restrict access to the system to specific IP address ranges. You can use this feature to ensure that your users only access the system from specific network locations, such as your office. If this feature is enabled, your users can only sign in to the application from machines that have IP addresses within the range you specified.

**Before you begin.** Contact Customer Care so that they can enable the IP filtering for your company. After that, to perform this procedure, your role must include the Administer Company Profile privilege.

*To restrict use to IP addresses*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Company Administration link.
- 3 Click the Security Settings link.
- 4 On the Security Settings page, enter the IP addresses that are acceptable for signing in.  
**TIP:** Review the onscreen information about the correct way to enter IP addresses.
- 5 Save the record.

## Reviewing Your Company's Resource Usage

You can review the resource usage for your entire company, including changes to these areas:

- Reset Password
- Forget Password
- Answer Security Questions
- Change SSO Identifier
- Change to User ID
- Change to Email address
- Set Password
- Initial Password
- PIM Sync
- Offline

**Before you begin.** To perform this procedure, your role must include the Administer Company Profile privilege.

*To review your company's resource usage*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.

- 3 In the Resource Audit section, click the Audit link.
- 4 Review the resource usage history for your company.

### Related Topics

Synchronizing with PIMs	333
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## Alerts

Click the topic you are interested in:

- [Reviewing Your Alerts](#) (on page 29)
- [Publishing Company-Wide Alerts](#) (on page 544) (Administrators only)
- [Working with Lists](#) (on page 56)
- [Alert Fields](#) (on page 545)

## Publishing Company-Wide Alerts

Company-wide alerts appear on each employee's My Homepage. You can use alerts to broadcast company-wide information, such as meeting notices and policy changes.

**NOTE:** Alerts announcing that a forecast has been generated remain on the employees' My Homepage for two days. To extend the period the alert appears, make the changes on the Alert Edit page after the alert first appears. For instructions, follow the procedure in this section.

You can link files or URLs to alerts. For example, when creating a meeting notice alert, you can add a link to a Web page with directions to the meeting location.

**Before you begin.** (Optional) Create or locate a Web page or file that contains information you want to share. Make sure that the path to the Web page or file is accessible to your users. To perform this procedure, your role must include the Administer Company Profile privilege.

### *To create or update company-wide alerts*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 On the Admin Homepage, click the Company Administration link.
- 3 Click the Company Alerts link.

The Alerts page appears with a list of company alerts.



- 4 On the Alerts page, do one of the following:
  - Click the New button.
  - Click the title of the alert you want to edit, and then click the Edit button.
- 5 On the New Alert or Alert Edit page, complete the required information.
- 6 Save the alert.
- 7 To add an attachment to the alert, click the alert title on the Alerts list page to open the alert details.
- 8 Click the Add Attachment button, and enter the information.
- 9 On the Attachment Edit page, click Save.

## Alert Fields

The following table describes the field information you might see in an alert record. If you are an administrator, you can see and update all alert fields. Otherwise, you are restricted to viewing a limited number of alert fields.

Field	Description
Title	Title of the alert as it will appear on My Homepage.
Priority	Priority of the alert, which is indicated by the icon next to it on My Homepage.
Created By	Person who creates the alert. System-generated.
Hyperlink	URL or filename and directory path associated with the alert.
Alert Description	Text as it will appear in the alert.
Post Date	Date you want the alert to begin being broadcast across My Homepage.
Expiration Date	Date you want the alert to end being broadcast across My Homepage.
Displayed Hyperlink	<p>Text as it will appear for the hyperlink in the alert. This is required if you have entered a hyperlink.</p> <p>For example, for the Link (URL) "http://company.site/doc_2389.html", you might type "Directions to meeting" for the hyperlink text in the alert.</p>

**TIP:** You can create filtered lists to limit the type of alert records displayed at one time. For instructions, see [Working with Lists](#) (on page 56).

## Managing Currencies

To allow users to conduct and track business in any currency, you need to activate those currencies. Otherwise, the default currency set up for the company is the only option.

If your employees record transactions in other currencies, you also need to set up exchange rates between those currencies and your company's default currency. The application uses the exchange rates when rolling up revenue for reports and forecasting.

**CAUTION:** Be sure to set up exchange rates before your users enter transactions for all currencies you activate.

You can enter multiple exchange rates for any active currency. Each entry consists of the Exchange Date and an Exchange Rate for that date. In determining which exchange rate to use for a particular transaction, the application follows these rules:

### For Forecast rollups:

- If there is an exchange rate defined for the same date as the transaction, it uses that Exchange Rate value.
- If no exchange rate is defined for the same date as the transaction but there are exchange rates defined for dates before the transaction, it uses the exchange rate with the date that is nearest to the transaction date.
- If no exchange rate is defined for the same date as the transaction and there are no exchange rates defined for dates before the transaction, it uses the next available exchange rate that has a date *after* the transaction date.

For example, if exchange rates are entered for only 5/15/2004 and 8/15/2004, then this occurs:

- For transactions prior to 5/15/2004, the 5/15/2004 rate is used.
- For transactions between 5/15/2004 and 8/14/2004, the 5/15/2004 rate is used.
- For transactions on or after 8/15/2004, the 8/15/2004 rate is used.

### For Reports:

For reports, exchange rates are applied in a more general way than for forecasting. A single exchange rate is determined for each month, and all transactions within a month use that rate. The exchange rate assigned to a month is determined as follows:

- If more than one exchange rate exists for a month, the one with the latest date in that month is used.
- If no exchange rates exist for a month, that month's exchange rate is set to the same rate as the closest future month that has a rate defined for it.
- If there are no exchange rates for future months, the first previous month's exchange rate is used.

For example, if exchange rates are defined for 5/10/2004, 5/20/2004, and 8/14/2004, then:

- The May 2004 rate will be the value set for 5/20/2004 (the latest rate set for May).
- The August 2004 rate will be the value set for 8/14/2004 (the only rate set for August).
- April 2004 and prior months will be assigned the May 2004 rate (closest future month).
- June and July 2004 will be assigned the August 2004 rate (closest future month).
- September 2004 and future months will be assigned the August 2004 rate (no future month, so first previous month is used).

In reports, any values that require translation between currencies will use the exchange rate defined for the month that the transaction falls in, calculated as described above.

**NOTE:** During forecasting, all opportunities are converted to the company default currency for forecast rollups. However, in reports, revenue fields are converted to the end user's currency amount.

You need to wait until the daily analytics refresh runs when either of these situations occurs:

- A new currency is activated for your company and the exchange rate is set up
- A new currency is selected by a user that no other user for your company has selected (on the Personal Detail page)

The refresh automatically generates any required cross exchange rates. After that, you can run historical or real-time reports.

Whenever users change their default user currency, they must sign out of the Siebel CRM On Demand application and then sign in again before reports will display in the newly-selected currency.

**Before you begin.** To perform the procedures for managing currencies, your role must include the Define Currencies privilege. Also, to understand the effect of currency settings, read [About Profile Settings for Users](#) (on page 310).

### *To activate currencies*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Company Administration link.
- 3 Click the Currency Definition link.
- 4 On the Currency Setup page, select All Currencies from the drop-down list.
- 5 Click the Edit link for the currency you want to activate.

- 6 On the Currency Edit page, select the Active check box.
- 7 (Optional) On the Currency Edit page, you can change the symbol corresponding to the currency.  
  
For example, you might want to distinguish currencies by their currency codes instead of by their symbols. Therefore, you would change \$ to USD, ¥ to JPY, and € to EUR.
- 8 Save the record.

### *To define the exchange rates*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Company Administration link.
- 3 Click the Exchange Rates link.  
  
The Exchange Rate Edit page appears with the latest exchange rates for your activated currencies. If no exchange rate has been defined, it appears blank.  
  
**NOTE:** The *To Currency* is always the currency that is set for your company. You must enter exchange rates that tell the application how to convert each active currency into that currency.
- 4 To add a new exchange rate for an active currency:
  - a Click the Exchange History link for the Currency row for which you want to add a rate.  
On the Exchange Rate page, click New.
  - b On the Exchange Rate Edit page, complete the information.  
  
For Exchange Rate, enter how many units of the *To Currency* it would take to buy one unit of the *From Currency*.  
  
Example: 1 Euro = 1.3 US dollars.  
  
Assuming your company's currency is set to US Dollars (USD), you would enter these values:
    - From Currency: EUR
    - To Currency: USD
    - Exchange Rate: 1.3
- 5 Click Save.

### *To view a history of exchange rates*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Company Administration link.
- 3 Click the Exchange Rates link.  
On the Exchange Rate Edit page, the latest exchange rates appear for different currencies.
- 4 To see the history of exchange rates for a single currency, click the Exchange Rate History link.  
A history of the exchange rates appears.

## Application Customization

Your company probably has specific requirements for how data is gathered and recorded, what terminology is used, and how information needs to be presented so that employees have what they need to be productive. Application customization lets you customize Siebel CRM On Demand to meet your company requirements, including page layout, field management, and list access requirements.

The following examples illustrate some ways in which you can customize the application:

**Example 1:** You might want all of your sales representatives to include an email address on all of their contact records. The best way to make sure that this requirement is met is to make the Email field a required field. Then, anyone who creates a new contact record cannot save it unless it includes an email address.

**Example 2:** You have two groups of employees that each need to track different information on an account page. You can meet this requirement by creating a different account page layout for each group and providing the appropriate access through role assignment.

The Application Customization page has two sections:

- **Record Type Setup.** Contains links for each of the top-level record types. When you click a link, you are taken to a record-type-specific customization page. In the Record Type Setup section, the links for some record types are visible only if access to the record type is set up for your company. These record types are:
  - Custom Object 1
  - Custom Object 2
  - Custom Object 3
  - Dealer
  - Fund
  - Household
  - MedEd Event

- Portfolio
- Vehicle

See [Record Type Application Customization Page](#) (on page 550) for information about the tasks you can perform from the individual application customization pages.

- **Application Setup.** Contains links to various customization functions that are not specific to a record type. Click a topic to see step-by-step instructions for the procedures available from the Application Setup section:
  - [Displaying External Web Pages in Tabs](#) (on page 586)
  - [Creating Custom Web Applets](#) (on page 589)
  - [Creating Global Web Applets](#) (on page 593)
  - [Customizing My Homepage for Your Company](#) (on page 594)
  - [Enabling Custom Reports in My Homepage](#) (on page 595)
  - [Renaming Record Types](#) (on page 596) and [Adding Record Types](#) (on page 598)
  - [Changing the Icon for a Record Type](#) (on page 598)

For the [My Homepage Layout](#) and [My Homepage Custom Report](#) functions, your role must include the [Administer Homepage Customization](#) privilege.

### Before you begin:

- To perform the application customization procedures, your role must include the [Customize Application](#) privilege.
- Make sure you understand your business needs:
  - Talk with your business owners to understand their business processes and needs for the application.
  - Determine the fields, display names, values for picklists, and other custom fields required to support their needs.
  - Determine how the fields should be laid out on the interface and what fields must be marked as required.
  - Use the Field Setup and Page Layout templates, available in the Tools and Templates area of the Training and Support Center, to help you document your application customization requirements.

## Record Type Application Customization Page

For each record type there is an Application Customization page with links for customization tasks that you can perform for that record type.

The following table describes each of the possible sections on an Application Customization page, and lists the tasks that you can perform when you click the links in that section. The sections displayed depend on the record type and some sections are visible only if your role

includes a particular privilege. For all customization procedures, the Customize Application privilege is required.

Section	Tasks	Additional Privilege Required
Field Management	Renaming fields, creating custom fields, managing picklist values, specifying default values for a field, and setting up field validation. For more information about these tasks, see:  <a href="#">About Field Management</a> (on page 553) <a href="#">About Custom Fields</a> (on page 557) <a href="#">Creating and Editing Fields</a> (on page 559) <a href="#">Renaming Fields</a> (on page 565) <a href="#">Using Indexed Custom Fields</a> (on page 566) <a href="#">Changing Picklist Values</a> (on page 568) <a href="#">Reverting Settings to Defaults</a> (on page 568)	None
	Advanced defining of default fields and field validation	Advanced Field Management
Page Layout Management	Creating and managing static page layouts. For more information about these tasks, see:  <a href="#">Customizing Static Page Layouts</a> (on page 570) <a href="#">Renaming Field Section Titles</a> (on page 573)  Creating and managing Web applets that can be used on Detail page layouts; see: <a href="#">Creating Web Applets</a> (on page 574)  For information about advanced page layout management, see <a href="#">Specifying Dynamic Page Layouts</a> (on page 583).	None
Cascading Picklists	Defining and managing cascading picklists. For more information about these tasks, see:  <a href="#">Defining Cascading Picklists</a> (on page 575)	None

Section	Tasks	Additional Privilege Required
Search Layout Management	<p>Specifying targeted search fields and managing layouts for search results. For more information about these tasks, see:</p> <p><a href="#">Managing Search Layouts</a> (on page 576)</p>	None
List Access and Order	<p>Managing default list access and the display order for each role. For more information about these tasks, see:</p> <p><a href="#">Managing List Access and List Order</a> (on page 578)</p>	None
Homepage Layout Management	<p>Creating and managing Homepage layouts and specifying custom reports to be displayed on the Homepages. For more information about these tasks, see:</p> <p><a href="#">Creating Record Homepage Layouts</a> (on page 580)</p> <p><a href="#">Creating Homepage Custom Reports</a> (on page 579)</p>	Customize Application – Manage Homepage Customization
Custom Audit Trail	<p>Customizing the field audit trail for your company. For more information about these tasks, see:</p> <p><a href="#">Specifying Dynamic Page Layouts</a> (on page 583)</p>	<p>Administer Field Audit</p> <p>This feature is available only for the Opportunity, Service Request, and Fund record types (if these record types are set up for your company)</p>
Dynamic Layout Management	<p>Creating and managing dynamic page layouts. For more information about these tasks, see:</p> <p><a href="#">Specifying Dynamic Page Layouts</a> (on page 583)</p>	Customize Application - Manage Dynamic Layouts
Lookup Window Setup	<p>Managing the behavior of the Lookup Windows used with smart associations. For more information about these tasks, see:</p> <p><a href="#">Managing the Behavior of Lookup Windows</a> (on page 585)</p>	None



For some record types, the Field Management and Page Layout sections contain links for that record type and also links for the related record type. For example, the Account Application Customization page contains links for the following:

- [Account Field Setup](#)
- [Account Contact Field Setup](#)
- [Account Partner Field Setup](#)
- [Account Relationship Field Setup](#)
- [Account Team Field Setup](#)

## About Field Management

In Siebel CRM On Demand you can perform the following field management tasks for the different record types:

- [Creating and Editing Fields](#) (on page 559)
- [Renaming Fields](#) (on page 565)
- [Changing Picklist Values](#) (on page 568)

When you create custom fields or edit field definitions, you can specify default values for the field that take effect when new records are created. You can also specify that field validation is performed for the field to ensure that it has a particular value.

## About Field Validation

When you create custom fields or edit field definitions, you can specify in the Field Edit page that fields are required or read-only. Also, in the Enterprise Edition of Siebel CRM On Demand, you can define custom field validation rules that take effect when saving new or updated records.

### Required Fields

There are various situations where you might define fields as required. For example, your company might require that every service request must track information on the cause of a service request. In this case, you specify that the Cause field for service requests is required. Then, when a record is created or updated, and saved, the application validates that the Cause field is NOT NULL.

As another example, your company might have a business policy that if an opportunity is lost, which had an expected revenue of \$100,000 or greater, the reasons for losing must be tracked. In this case, you define the Reason field on Opportunity as required only when the Revenue field has a value greater than 100,000. When an Opportunity record is saved, the application validates that the Request field's value is greater than 100,000.

If a validation fails, an error message is displayed, warning users to enter a value for the required field before saving the record. You can also specify a custom error message (in the Field Validation Error Message field) to be displayed if the validation fails.

When you specify a field as Required, the validation is enforced through all interfaces, including the user interface, Web Services, data import, and bulk data load.

The fields specified as required in the Field Edit page, are required fields for all users, regardless of their role. If you need to make a field required only for a specific role, you can do so by editing the appropriate page layout for fields that are not already required fields. For more information, about editing page layouts, see [Customizing Static Page Layouts](#) (on page 570).

### Read-Only Fields

The following are situations in which you might define fields as read-only:

- **Fields from external sources.** If your company tracks, for example, the credit rating of an account in an external system, it is likely that you want the credit rating to be updated regularly through a nightly import, but only want the field to be read-only in the UI.
- **Moving an existing field to a custom indexed field.** If you want to use one of the index custom fields for an existing custom field, you can specify that users can have read-only access only to the old field while you move data to the new index field. This field definition avoids data becoming out of sync.

### Custom Field Validation Rules

In the Enterprise Edition, you can use Siebel Query Language to create expressions for custom field validation rules. You can click the *fx* icon next to the Field Validation field to open the Expression Builder window in which you can enter an expression. For information about the syntax you can use for expressions, see [Creating Expressions with Expression Builder](#) (on page 781).

The use of Siebel QL Expression Builder must be set up for your company through the Administer Advanced Field Management privilege.

The following are situations in which you might define custom field validation rules:

- **Enforcing business policy.** For example, if your company has a business policy that an MDF cannot be effective for more than one year, you can define a validation rule on an End Date field to ensure that the field value is never more than one year from the Start Date.
- **Enforcing data format.** For example, if your company uses a value-added tax (VAT) number on a European account, you can specify that validation of the correct VAT format, based on an account's billing address. As another example, you might specify that the value for a specific custom field is no more or no less than four digits long.

The following circumstances prevent a field validation expression from being evaluated:

- A field is left blank when the record is created. Field validation does not force a value to be required.
- A field has a pre-existing invalid value, and it is not changed when it is updated.

If a validation expression is not evaluated, or if a validation expression evaluates to NULL, no error message is generated. An error message is generated only when the validation expression fails (that is, the expression evaluates to FALSE).

Field validation expressions assume that the first parameter is the field name itself. If, for example, you are putting a simple field validation expression on an Amount field to specify that the value must be greater than 1000, it is sufficient to enter >1000. You do not need to enter [<Amount>]>1000. If you want to use more complicated expressions, you can use a construct such as the following:

```
=If(ComplexExpression, [<Amount>], "Invalid")
```

### Restrictions on Specifying Field Validation Rules

You cannot specify field validation rules for these types of fields:

- System fields
- Internal calculated fields
- RowID and ID fields
- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code.
- Web links

### About Defining Default Field Values

You can specify default values for fields in the Default Value field in the Field Edit page when you create custom fields or edit field definitions.

Specifying a default value for a field is useful where you require:

- A constant value for a field. For example, you might want an Account Type field to have a default value of Customer when a new record is created.
- A formula-based value as default. For example, you might want the default value for a Due Date field of Fund Requests to take a default value of 6 months after the value of the Create Date field.
- The generation of a unique value for a field. For example, you might want to specify an expression to generate a unique number as an ID for an Expense Report field. (This field is also read-only.)
- A role-specific default value. For example, in a company where the majority of the service requests (SR) are created by customer service representatives (CSR), a Reassign flag field might be checked by default so that, if, for example, a sales representative opens the SR, it is routed to the correct CSR based on pre-defined assignment rules.

**NOTE:** Most of these are possible only if your role includes the Advanced Field Management privilege.

There are two types of default values for fields:

- **Pre Default.** The field is prepopulated with the specified value when a user creates a new record. Users can overwrite the default value or accept the default value.
- **Post Default.** The field is not prepopulated with the specified value when a user creates a new record, but the field takes the specified default value when the record is saved, if:
  - The user leaves the field blank,
  - The field is hidden from the layout
  - A value has not been supplied by the integration tools

Pre Default is the default type of value for fields. You can specify Post Default by selecting the check box of that name in the Field Edit page.

Default field values are applicable to new records only, and not applicable to record updates. If you specify a default value for a field that already has a system-specified default, your value takes precedence for your company. You cannot set default values for these types of fields:

- System fields
- Internal calculated fields
- RowID and ID fields
- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code
- Web links

The functionality for defining default field varies depending on whether you have the Standard Edition or the Enterprise Edition of Siebel CRM On Demand. The following table shows the default values that you can specify for the different field types in the Standard Edition.

Field Type	Valid Default Values
Check box	If the check box is selected, the default value of the field is checked; otherwise, the default value is unchecked
Currency	A valid numeric value.
Date	Today + <i>number</i> , where <i>number</i> represents a specific number of days. The default date is calculated as today's date plus the number entered. For example, if today is 1 January 2008, and you enter Today + 7, the default value is set to 8 January 2008.
Date/Time	As for the Date field type, but in addition the time when the new record is opened is also shown.
Integer	A valid numeric value.

Field Type	Valid Default Values
Multi-select picklist	You cannot define a default value for a multi-select picklist.
Number	A valid numeric value.
Percent	A valid numeric value.
Phone	A valid telephone number.
Picklist	The picklist value selected will be the default value for the field.
Text (Long)	A text value up to 255 characters.
Text (Short)	A text value up to 40 characters.
Web link	A valid URL.

In addition:

- For all field types, including picklists, you can enter a constant value. For example:  
Status (Task) = 'Not Started'
- For Date fields you can specify a number of days from today's date. For example:  
Due Date (Fund Request) = Today() + 180
- For an Owner field you can specify a <record creator> (variable) or a specific user.  
No lookup is supported, You must type directly in the field.

In the Enterprise Edition, you can also use the full functionality of Siebel Query Language to create expressions for default field values. You can enter an expression directly in the Default Value field or click the *fx* icon to open the Expression Builder window in which you can enter an expression. For information about the syntax you can use for expressions, see [Creating Expressions with Expression Builder](#) (on page 781).

The use of Siebel QL Expression Builder must be set up for your company through the Advanced Field Management privilege.

## About Custom Fields

Siebel CRM On Demand supplies the default fields most organizations need to use the application. However, you might find that there are fields in your existing records that do not have the corresponding fields in the records in Siebel CRM On Demand. In this case, you can create new fields, called *custom fields*, to support the unique needs of your company. This need might arise when you have existing records that you want to import into Siebel CRM On Demand.

Custom fields:

- Can be used in assignment rules, reports, filtered lists, and targeted search
- Cannot be deleted

- Cannot be viewed until they are explicitly added to custom page layouts
- Are not inherited from one record type to another

For example, a custom field you added for leads is not automatically carried over to opportunities when that lead is converted to an opportunity.

Custom fields for lead records must be mapped if you want them to transfer when a lead is converted to an opportunity, account, or contact.

- Cannot be viewed by other users until they sign in again
- Can be referenced by Web links, Web services, and other integration technologies

The following table shows you how many new fields you can add to Siebel CRM On Demand. The data pertains to available fields for most record types; that is, you can add 100 new picklist fields for accounts, 100 for contacts, 100 for opportunities, and so on. The maximum number of active values in a picklist is 1000.

**Note:** For the Opportunity record type, the number of new fields allowed for the Text (Short) field type is 70. Also, for the Account record type, the number of new fields allowed for the Currency field type is 80.

Field Type	Number of New Fields Allowed
Check box	35
Currency	25
Date	25
Date/Time	25
Integer	35
Multi-select picklist	10
Number	33
Percent	30
Phone	10
Picklist	100
Text (Long)	30
Text (Short)	45
Web Link	100

## Creating and Editing Fields

You can create custom fields and edit existing field definitions in the Field Edit page for a record type.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### To create custom fields and edit fields

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 In the Field Management section, click *record type* Field Setup.
- 5 On the Fields page:
  - Click New Field if you are creating a custom field.
  - Click the Edit link for the field to edit the field's definition.
- 6 On the Field Edit page, enter a Display Name.  
The display name is the label for the field.
- 7 On the Field Edit page, select a Field Type if you are creating a field.

**CAUTION:** The Field Type cannot be changed after you save the custom field.

The following rules apply to custom fields, which might differ from those applicable to default fields of the same field type:

Field Type	Maximum Length	Notes
Date	25	
Date/Time	25	
Integer		Whole numbers ranging in value from - 2147483648 to 2147483647.
Multi-select picklist		You cannot define a default value for a multi-select picklist.
Number		Numbers ranging in value from - 2147483648 to 2147483647.
Phone	35	

Field Type	Maximum Length	Notes
Picklist	30	
Text (Long)	255	Text fields use a single-line text field.
Text (Short)	40	Text fields use a single-line text field.
Web Link	n/a	Web Link custom fields allow you to create context-sensitive hyperlinks in your layouts.

- 8 In the Additional Properties section, complete the following fields as required:

Field	Comments
Required	Select this check box to make the field a required field when creating or updating records. For example, you can require that all users fill in the Account field when adding new contacts.
Default	<p>Enter an expression directly, or, if you have the Enterprise Edition of Siebel CRM On Demand, click the <i>fx</i> icon to open the Expression Builder window.</p> <p>For more information about setting default values, see <a href="#">About Field Management</a> (on page 553), and for information about the syntax you can use for expressions, see <a href="#">Creating Expressions with Expression Builder</a> (on page 781).</p> <p>You can add complex expressions only if your role includes the Advanced Field Management privilege. Otherwise, you can add constants and some simple expressions only.</p>
Read Only	Select this check box to make the field read-only.
Post Default	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Select this check box if you require that the field is not automatically filled with the default value when a new record is created. The specified default value is set when the record is saved only if a value is not supplied by the user or by integration tools.</p>
Field Validation	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Enter an expression directly, or, if you have the Enterprise Edition of Siebel CRM On Demand, click the <i>fx</i> icon to open the Expression Builder window.</p> <p>For more information about setting default values, see <a href="#">About Field Management</a> (on page 553), and for information about the syntax you can use for expressions, see <a href="#">Creating Expressions with Expression Builder</a> (on page 781).</p>



Field	Comments
Field Validation Error Message	<p>This field is displayed only if your user role includes the Advanced Field Management privilege.</p> <p>Enter a custom error message to be displayed in addition to the standard message if validation fails for the field. The message can contain only letters, numbers, spaces, commas, periods, and dashes.</p> <p>The following shows how the error messages are displayed, depending on whether you specify a custom error message:</p> <ul style="list-style-type: none"> <li>■ <b>If field validation is set, and no custom message specified:</b> The value entered for '<i>Field</i>' does not meet the validation rules set by your company administrator. The validation condition is '<i>Rule</i>'.</li> <li>■ <b>If field validation is set, and a custom message is specified:</b> The value entered for '<i>Field</i>' does not meet the validation rules set by your company administrator. [<i>Custom Error Message</i>].</li> </ul>

9 Click Save.

The new fields that you add automatically appear in blue text and brackets in the other activated languages (regardless of the setting of the Mark for Translation check box).

10 To manually enter the translated equivalent of the new name or Field Validation Error Message:

- a From the Translation Language drop-down list, select the language whose translation you want to enter.
- b Enter the translated equivalent in the appropriate Display Name or Field Validation Error Message field, and click Save.
- c Click the link to return to the Fields page you just updated, and select the language again, if necessary.

The translated name appears in black text in the Display Name column.

**NOTE:** For custom fields to display in Siebel CRM On Demand Answers when the On Demand user language differs from the language in which the custom field was created, the custom field must be translated into the applicable language. For example, if a custom field is created in English, a German language user does not see this field in Siebel CRM On Demand Answers unless the field is translated into German.

Selecting Mark for Translation overwrites both Display Name and Field Validation Error Message in all other languages.

**11** If you created a picklist or multi-select picklist:

- a** Click the Edit Picklist link for the custom field.
- b** In the Picklist Values box, enter each value on a separate line.
- c** Save the record.

**NOTE:** Now you must expose newly-created custom fields, so that they appear on the forms (Edit, Detail and Create forms). They do *not* appear by default. To expose the custom field, create new page layouts as required and make sure that these page layouts are assigned to each role that needs to view the field.

## Setting Up Custom Field Integration Tags

Integration tags for custom fields are language independent symbolic identifiers that get assigned to every custom field. These tags are used by Web Services (used when generating WSDL files) and Web Link custom field parameters. These tags allow an administrator to set a meaningful integration name for each custom field. This name is used by integration components, so that the label names can be changed without affecting existing integrations. Integration tags are not visible to end users.

Integration tags are also used by the Siebel QL Expression Builder, and therefore are used in Workflow and field management.

**CAUTION:** Do not change integration tags after setting them up. If you do, you risk losing any technologies that reference the integration tags.

### *To set the integration tag for a custom field*

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** Click the Application Customization link.
- 3** In the Record Types Setup section, click the link for the required record type.
- 4** In the Field Management section, click *record type* Field Setup.
- 5** On the *record type* Fields page, click Rename Fields.
- 6** On the Rename Fields page, click the Advanced button.
- 7** Update the Integration Tag.

**TIP:** For the Integration Tag, use a short, descriptive name that easily identifies this custom field. This tag is referenced by Web Services, Web links, and other integration technologies (WSDL files for Web Services and URL Parameters for Web Links).

## Setting Up Web Links

A Web link is a custom field that allows you to place a hyperlink to an external Web site or Web-based application in a record in Siebel CRM On Demand. You can use a Web link custom field to provide a convenient way for users to navigate to another Web page, including another page in Siebel CRM On Demand. You can create Web link custom fields for any record type. As with other custom fields, you must add Web Link fields to your record page layouts to make them visible to your users.

You can configure a Web link to simply open another Web site. You can also configure the Web link to pass specific information from the Siebel CRM On Demand record as a parameter in the URL. For example, you might create a Web link field to pass address information from an account record to a Web site that provides address-specific maps. Then, when the user clicks the Web link on the account record, a map for your account location is opened.

**Before you begin.** To configure Web Link fields, you must be familiar with the syntax of the target URL.

### *To set up the Web link*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 In the Field Management section, click *record type* Field Setup.
- 5 On the Fields page, click the Edit Web Link link for the custom field.
- 6 On the Edit Web Link page, fill in the information in this recommended sequence:
  - a For Field Display Name, select how you want the system to behave when a user clicks the hyperlink:
    - **Open in Current window.** Opens the hyperlinked page in the current window, replacing the current Siebel CRM On Demand session.
    - **Open in Custom Web Tab.** Opens the hyperlinked page in a custom Web tab.
    - **Open in New window.** Opens the hyperlinked page in a new window, leaving the current Siebel CRM On Demand window unchanged.
  - b For Target Custom Web Tab, select a Web tab, if required.
  - c For Url, enter the URL that is invoked when the user clicks the hyperlink, such as `www.oracle.com/siebel`.

You can also include context-sensitive parameters here by placing the cursor in the URL field and then selecting the User Fields or (Record Type) Fields drop-down list. This places a field parameter in the URL (designated by `%%%fieldname%%%`) which is replaced by the field value based on the current record when the user clicks the value.

If you do not specify any URL, the user is directed to a void URL when clicking the link.

**NOTE:** Each browser has a maximum URL length. If you specify a URL that exceeds this length, users may see indeterminate behavior on the browser when they click the Web link.

- d For Display Text, enter the label (display name) for the hyperlink, which the user sees in the layout.

Example: Click Here for Stock Ticker (underlined).

You can also include context-sensitive parameters in the Display Text field by placing the cursor in the Display Text field and then selecting the User Fields or (Record Type) Fields drop-down list. This places a field parameter in the Display Text field (designated by %%%fieldname%%%) which is replaced by the field value based on the current record.

**NOTE:** If your display text is too long to fit in the layout, it will be concatenated. Also, the information for any variables is added at runtime.

- e For User fields, select an option from the User Fields drop-down list to add user parameter fields to the URL field or Display Text field at the current position of the cursor.

For example, if you choose User id from the drop-down list, %%%User id%%% is inserted into either the URL or the Display Text, depending on where your cursor is positioned. At run-time, this parameter is replaced with the user ID of the user who is logged in.

- f For *Record Type* Fields, place your cursor in the URL or Display Text field where you want to add a parameter, and then select the field you want to include from the drop-down list.

For example, if you select the field Row id, %%%Row id%%% is inserted into either the URL or the Display Text, depending on where your cursor is positioned. At run-time, this parameter is replaced with the row ID of the current record.

**NOTE:** *Record Type* refers to the record type where you add the Web link custom field. For example, if you are editing a Web link for a contact record, this field appears as the Contacts Fields drop-down list.

- 7 Click Save.

## About Using Web Links to Create New Integration Scenarios

The addition of Web link custom fields to Siebel CRM On Demand allows for many new integration scenarios. You can create a user interface-based integration to on premise and external systems that allow users to navigate directly to content from within Siebel CRM On Demand.

Some examples include:

- Create a link to a financial Web site based on the account ticker symbol that brings up a stock chart for the account.
- Create a link to an internal system that uses Web Services and creates a composite view of data from multiple on premise and hosted solutions relevant to the current account.

For step-by-step instructions on how to create Web links, see [Setting Up Web Links](#) (on page 563).

## Renaming Fields

To use terminology that is familiar to your employees, you can change field names. For example, you can change the Account Name field label to Company Name.

**NOTE:** It can take 30-60 minutes for the new field display names to appear in reports and analytics.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To rename a field*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field Management section, click the required Field Setup link.  
The Fields page appears, showing the fields for that record type.
- 5 Click Rename Fields.
- 6 In the Display Name column, edit the Name for the field.
- 7 (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

**NOTE:** If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name

appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.

If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

Selecting the Mark for Translation check box also causes the Field Validation Error Message (from the Field Edit page) to be marked for translation if the error message exists. The Field Validation Error Message field is visible only for users whose role includes the Advanced Field Management privilege.

**8** To manually enter the translated equivalent of the new name:

- a** From the Translation Language drop-down list, select the language whose translation you want to enter.
- b** Enter the translated equivalent in the appropriate Display Name field and click Save.
- c** Click the link to return to the Fields page you just updated and select the language again, if necessary.

The translated name appears in black text in the Display Name column.

**9** Click Save.

## Using Indexed Custom Fields

To optimize performance, you can use custom fields that have been indexed for specific record types. Indexed fields are special fields that improve the response time during the search process or sorting on a particular list. Indexed custom fields are preconfigured in the application database. You can change the labels on the indexed custom fields, but you cannot change the integration tags.

**NOTE:** As an option, you can choose to migrate your data from nonindexed to indexed custom fields to increase the performance of the lists that your users execute. To migrate the existing data to the available record types, use Siebel CRM On Demand's export/import functionality or Web Services.

Indexed custom fields are prefixed with *Indexed* as a default. The following table lists record types that support indexed custom fields:

Record Types Supporting Custom Fields	
Account	Household
Activity	Lead
Asset	MedEd Event
Call Product Detail	Opportunity
Call Sample Drop	Opportunity Product Revenue

Record Types Supporting Custom Fields	
Campaign	Portfolio
Contact	Product
Custom Object 1	Service Request
Custom Object 2	Solution
Custom Object 3	Vehicle
Dealer	Vehicle Sales History
Fund	Vehicle Service History
Fund Request	

Each record type has the following number of indexed field types, with the exceptions noted after the following list:

- Indexed Check box - 1
- Indexed Currency - 1
- Indexed Date - 1
- Indexed Number - 1
- Indexed Picklist - 6
- Indexed Short Text - 2
- Indexed Long Text - 1

**Exceptions:** The Account and Dealer record types do not have an Indexed Long Text field because of a tablespace limitation. The Custom Object record types have only one new field, the Indexed check box field, because the other fields can already exist. The existing Custom Object indexed fields can be displayed under the following assigned names:

- Index Picklist 6 = Type
- Index Short Text 1 & 2 = Quick Search 1 & 2
- Index Long Text = Name

#### *To use indexed custom fields*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.

- 4 In the Field Management section, click *record type* Field Setup.
- 5 Click Rename Fields and rename the indexed custom fields as appropriate for your company, see [Renaming Fields](#) (on page 565).

## Reverting Settings to Defaults

You can revert all relabeled field names to their original names. (The default option does not affect custom fields or picklist values you added—they do not revert to their default values.)

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To revert settings to their defaults*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field Management section, click the required Field Setup link.  
The Fields page appears, showing the fields for that record type.
- 5 Click the Rename Fields button.
- 6 Click the Default button.

## Changing Picklist Values

Some fields give users a drop-down list of predefined values from which they must choose. This list of values is called a *picklist*. For example, the values in the Area field picklist for service requests might be Product, Installation, Maintenance, and Training.

You can add, edit, and reorder values to the picklists for fields. Picklists must contain at least one value.

The system does not allow you to change picklist values used for forecasting and report metrics. However, it does allow you to change other picklist values used as the basis for standard lists that appear in other areas of the application. For those standard lists, the application still includes the records meeting the criteria, regardless of the picklist values you renamed. For more information, see [About Fields, Picklists, and Metrics](#) (on page 601).

**CAUTION:** As a best practice, do not rename the existing picklist values. Instead, disable the old picklist value and create a new one.



**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To change picklists*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Field Management section, click the required Field Setup link.
- 5 The Fields page appears, showing the fields for that record type.
- 6 Click the Edit Picklist link for the field whose values you want to customize.
- 7 In the Edit Picklist window:
  - To change an existing value, enter the new value in the Picklist Values field, or disable the old value and create a new value.

**NOTE:** If you want this updated name to appear in the picklists for other activated languages, select the Mark for Translation check box. In the other languages, this updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.

If you do not select Mark for Translation, the other picklist values are unaffected by the change you made here.
  - To add a new value, enter the information in the row that appears at the bottom of the list.

To add further new values, click Save & New.

New picklist values you add automatically appear in blue text and brackets in the other activated languages (regardless of the setting of the Mark for Translation check box).
  - To delete a value, select the Disabled check box. To hide or show disabled values, click Hide Disabled and Show Disabled respectively.

**CAUTION:** When you disable values, you also hide the translated versions in other languages.
  - To arrange the order in which the picklist values appear, change the numbers in the Order column.

**TIP:** Consider entering numbers with gaps between them, such as 10, 20, 30, and so on. This allows you to add new values in the middle of the picklist more easily, without reordering the entire list.
  - To arrange the picklist values in alphabetical order, click the Save & Order Alphabetically button.

- 8 In the Edit Picklist window, click Save & Close.
- 9 To manually enter the translated equivalent of the new picklist value:
  - a On the Fields page, select the language from the Translation Language drop-down list.
  - b Click the appropriate Edit Picklist link.
  - c Enter the translated equivalent and click Save.

**NOTE:** To help you identify the picklist value when you are editing, the application displays the internal ID and the language-specific default value. If you edit the wrong picklist value, the picklist becomes out of sync across languages.

## Customizing Static Page Layouts

The right look and feel of an application is important for user adoption, and one way to achieve the right look and feel is by customizing page layouts. As part of the customizing process, you can:

- Add custom fields to the Edit, Detail, and Create forms.
- Make fields required on the Edit and Create forms.
- Add or hide sections on the Detail pages.

You can make sections unavailable (hidden) to your employees or you can make them available but hide them initially.

There are two methods of customizing page layouts. You can define static page layouts defining specific fields by role, or dynamic page layouts that change based on the type of record being created. Dynamic page layouts can also be assigned by role.

You can create new layouts for each record type and then assign a page layout for each record type to a user role. When a user with that role signs in, the user then sees any customized layout specific to each record type. For example, you can create two page layouts for opportunities: one simplified layout for service representatives showing only the most important fields and another layout for field sales representatives showing many more fields, and assign the different layouts to the different roles. Users who are not assigned the service representative or field sales representative roles continue to see the default layout for the Opportunity page. As another example, you can create two page layouts for contacts, such that the Account field is required when service representatives add new contacts, but not required when service managers add new contacts.

If you do not assign a custom page layout for a record type for a given role, the default page is used for that record type.

When customizing a page layout, you can determine:

- Which fields appear on the page  
For custom fields to appear, you must add them to the page layouts. After that, users with roles to which the custom page layout is assigned will see the fields on the Edit page, Detail page, and Create form (in the Action bar).
- Where fields appear on the page
- Which fields are required
- Which fields are read-only
- Which linked record types are displayed in the Related Information sections on the Detail page.  
For example, you might want linked contacts to appear on the Accounts Detail page.
- How many page sections appear and with which headings.

You can copy standard layouts, but you cannot edit or delete them. You can delete custom layouts, unless it is already assigned to a role or a dynamic layout.

### Considerations for Fields in Page Layouts

Some record fields are important to report and forecast calculations. To enforce the consistent use of these fields, they are flagged as required. You cannot change the required flag on these fields when customizing a page layout. You also cannot remove them from a page layout.

Removing fields from a page layout can have important implications for how the records are used. For example, if you remove the Status and Publish fields on solutions records, employees with that page layout cannot approve solutions or make them available to others.

Addresses are grouped together so that the field and their labels reflect the naming convention for each country. Therefore, for some record types, you cannot separate out individual address lines. Instead, you must select the field that includes the group of address lines (a single address option). This option replaces the individual fields that you could select in previous releases, such as Street, City, Zip Code. For example, for leads, the field Billing appears on the Field Setup and Field Layout steps of the Page Layout assistant. The Billing field includes all the Billing Address fields.

### Before you begin:

- To perform this procedure, your role must include the Customize Application privilege.

### *To create a page layout*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.
- 4 In the Page Layout section, click the required Page Layout link.

**5** In the Page Layout list, do one of the following:

- Click the Edit button for an existing layout to modify it.
- Click the New Layout button to create a new layout.
- Click the Copy button to copy an existing layout.

The Page Layout Wizard appears to guide you through the process.

**6** In Step 1 Layout Name, enter a name for the layout and a description (optional).

**7** In Step 2 Field Setup, select the field characteristics.

Select the Required check box for any fields that you want to make required.

Select the Read Only check box for any fields that you want to make read only.

**CAUTION:** Make sure that you do not remove a required field from a page layout. If you do, anyone with that layout will be unable to create or edit a record of that type.

**8** In Step 3 Field Layout, you can:

- Move fields from the *record type* Available Fields list to various sections of the *record type* Arrange Page Layout area.

Make sure you move the custom fields and the industry-specific fields you want to add to the forms.

- Rearrange the information.

**NOTE:** These changes affect all the forms for that record type when a user with an appropriate role views the pages. Some fields include a group of fields or multi-line fields. Avoid moving those fields around since the information itself might overlap other fields in the final layout. For this reason, the application does not allow you to move multi-line text fields, such as Description.

The application uses an address template that provides the fields specific to each country. For more information, see [About Countries and Address Mapping](#) (on page 731).

**9** In Step 4 Related Information, you can:

- Add sections or remove sections that appear on the Detail pages. The sections are the areas where users can link records to the current record.

For example, if you don't want employees to be able to link products to opportunities, make sure the Products section does not appear in the Displayed or Available Information box.

**NOTE:** Users can change these default settings through the Edit Layout link on the Detail page for their application. After users have edited their personal layouts, they do not see new changes to the related information made by the company administrator until they edit their layout another time.

- Change the order of the sections on the Detail pages.

**NOTE:** These changes affect the Detail pages for that record type when a user with an appropriate role views the pages.

**10** Click Finish.

**11** Assign the page layout for this record type to user roles as required, see [Adding Roles](#) (on page 608).

## Renaming Field Section Titles

On the record Edit and Detail pages, fields are grouped into sections. To use terminology that is familiar to your users, you can rename the titles above groups of fields on your Edit and Detail pages. On the Account Homepage, for example, you can change Key Account Information to Account Profile.

You cannot rename sections on the standard layouts. You must create a new one and rename the sections on the custom layout.

Sections with no fields in them do not appear on the Detail page.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To rename a section*

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Application Customization section, click the Application Customization link.
- 3** In the Record Type Setup section, click the link for the required record type.
- 4** In the Page Layout section, click the required Page Layout link.
- 5** In the *record type* Page Layout page, click Edit Sections.
- 6** In the Translation Language drop-down list, select the primary language for your company.
- 7** In the Display Name, type in the name you want to use.
- 8** (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

**NOTE:** If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.

If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

- 9 To manually enter the translated equivalent of the new name:
  - a From the Translation Language drop-down list, select the language whose translation you want to enter.
  - b Enter the translated equivalent in the appropriate Display Name field and click Save.
  - c Click the link to return to the Fields page you just updated and select the language again, if necessary.

The translated name appears in black text in the Display Name column.

## Creating Web Applets

You can embed external Web content by creating a custom Web applet that appears on a Homepage or the Detail page for a record type.

When you create a Web applet, you must add it to the page layout for the Homepage or Detail page. For users to see that page layout, it must be assigned to an appropriate user role.

**Before you begin.** To perform this procedure, your role must include the Customize Application and Manage Custom Web Applets privileges.

### *To create a new Web applet*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Types Setup section, click the link for the required record type.
- 4 Select *record type* Web Applet.
- 5 In the *record type* Applet list, click New.
- 6 On the Web Applet page, complete the following fields.

Field	Comments
Name	Enter a name.
Location	Select Homepage or Detail Page, depending on whether the external content is to appear on a homepage or on the Detail page.

Next, complete the fields according to the type of applet you require, as described in [Creating Custom Web Applets](#) (on page 589).

### *To make the Web applet visible*

- 1 Navigate to the *record type* Application Customization page.
- 2 In the Page Layout Management section, click the link for the record type Page Layout.
- 3 In the record type Page Layout list, click New Layout or Edit.
- 4 In Step 1 Layout Name, make sure the layout has a name, and if required, a description.
- 5 In Step 4 Related Information:
  - a Move the new Custom Web applet from the Available Information list to the Displayed Information list.
  - b Use the up and down arrows next to Displayed Information to position the new custom Web applet as required.
  - c Click Finish to create the new layout.
- 6 Add the page layout to user roles as required, see [Adding Roles](#) (on page 608).

## Defining Cascading Picklists

Cascading picklists restrict the values of one picklist, the *related* picklist, based on the value selected in another picklist, the *parent* picklist. For example, a parent picklist might present a list of service request Categories and drive the value of a related picklist called Sub-Categories. When the user selects, for example, the value Installation for Category, the Sub-Categories picklist is dynamically constrained to show only the picklist values that are associated with the Installation Category.

You can link together multiple picklists, including both pre-defined and custom picklist fields, as cascading picklists. You can also nest cascading picklists, so a related picklist in one cascading picklists definition can be a parent picklist in another cascading picklists definition.

**Before you begin.** Before you create a cascading picklists definition, the parent and related picklists must exist. For information about creating picklists, see [Creating and Editing Fields](#) (on page 559). To perform this procedure, your role must include the Customize Application privilege.

### *To create a cascading picklists definition*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Record Type Setup section, click the link for the required record type.

- 4 In the Cascading Picklists section, click the required Cascading Picklists link.

The record types listed include the parent record type and related record types that have custom picklist values. For example, for opportunities there are links for Opportunity Partner, and Opportunity Competitor.

- 5 In the Cascading Picklists page, do one of the following:

- Click Edit or Copy to modify an existing cascading picklists definition.
- Click the New button to create a new cascading picklists definition.

The Cascading Picklists Wizard guides you through the process.

- 6 In Step 1 Select Picklists, select a parent picklist and a related picklist.

- 7 In Step 2 Select Values, you can:

- View the existing associations between a Parent Picklist value and the Related Picklist values. When you select a value in the Parent Picklist Available Values list, the available values for the related picklist are shown in the Related Picklist Available Values list, and the values that will be displayed are shown in the Related Picklist Displayed Values list. If there are no values in the Related Picklist Displayed Values list, all of the values in the related picklist will be displayed when the corresponding value in the parent picklist is selected.
- Create a new association. Move the desired value from Related Picklist Available Values to Related Picklist Displayed Values.
- Remove an existing association. Move the value from Related Picklist Displayed Values to Related Picklist Available Values.

- 8 In Step 3 Confirm, you can confirm your selections of Related Picklist values for each Parent Picklist value, and then click Finish to complete defining the cascading relationship between the Parent and the Related picklists.

Clicking Finish in the wizard returns you to the Cascading Picklist List for the current record type.

After you click Finish, and add the cascading picklists definition to a page layout, it is automatically activated for all roles that include that layout.

## Managing Search Layouts

For each record type you can specify the fields, both standard and custom fields, which users can use when searching for records. Also, you can specify the fields that are displayed in the search results page. You specify the search fields in a search layout, and you can assign a search layout for each record type to user roles as required, see [Adding Roles](#) (on page 608).

You can copy an existing search layout and then modify it to your requirements, or you can edit existing search layouts. The default search layout is read-only. You can copy it, but you cannot delete or edit it.



**Before you begin:**

To perform this procedure, your role must include the Customize Application privilege.

***To create or modify a search layout***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the *record type* Application Customization page, click the *record type* Search Layout link.
- 4 In the Search Layout list, do one of the following:
  - Click Edit or Copy to modify an existing layout.
  - Click the New Layout button to create a new layout.
  - Remove an existing layout not currently assigned to a role.

The Search Layout Wizard guides you through the process.

- 5 In Step 1 Define Layout Name, enter a name for the layout, and a description if required.
- 6 In Step 2 Specify Targeted Search Fields, you can:

- Move fields from the Available Fields list to the Selected Fields list.

The Available Fields include all the indexed and non-indexed fields, in alphabetical order. Indexed fields are displayed in green. The indexed fields that are also case insensitive are displayed in blue.

**NOTE:** For optimal performance, you should use indexed fields when defining your targeted search fields.

The Selected Fields include the fields that will be available for targeted search in the Search section of the Action bar, and as the pre-populated default fields in the Advanced Search criteria form. These fields also appear as pre-populated default fields in the Search criteria when creating new Lists. For more information about searching for records, see [Finding Records](#) (on page 35).

If you are copying a layout, the default fields for the record type are displayed in the Selected Fields list, see Default Search Columns.

- Rearrange the fields.
- 7 In Step 3 Define Search Results Layout you can:
    - Move fields from the Available Fields list to the Selected Fields list.
    - Rearrange the fields.
  - 8 Click Finish.

## Managing List Access and List Order

For each record type you can specify the lists that are available for each role, and the order in which the lists are displayed on the record type's Homepage.

You can create a new layout for only those roles that you have not already customized. You can also edit or delete existing layouts. You cannot manage the list access and order for a user's private lists.

### Before you begin:

Because you must select a role that this customization applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customize Application privilege, and the Manage Public Lists and Role Management privileges.

### To create or modify list access

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the *record type* Application Customization page, click the *record type* List Access & Order link.
- 4 In the List Order Layout page, do one of the following:
  - Click Edit or Copy to modify an existing layout.
  - Click the New Layout button to create a new layout.
- 5 If you are creating a new layout, select a role from the Role Name drop-down list.

Only roles that do not already have an associated layout are available in the drop-down list.
- 6 Move lists between the All Lists, Lists Available for this Role, and Show in Short List lists as required.
  - All Lists contains all the lists for the record type, apart from private lists.
  - Lists Available for this Role contains all the lists available for the role that you select.
  - Show in Short List contains the lists displayed in the List section in the Homepage for the record type, and the drop-down menu in the record type view.
- 7 Rearrange the order of the lists as required using the up and down directional arrows.
- 8 Click Save.

## Creating Homepage Custom Reports

You can specify the custom reports that can be added to a Homepage for a record type. This allows you to provide the most relevant information to different users, including the ability to display custom analytics on Homepages. For example, the Homepage for a customer service representative can be configured to show a custom service-request report instead of the standard sales-pipeline quality report.

These custom reports are then displayed in the Available Sections list in the Homepage Layout Wizard. For more information about customizing Homepages, see [Creating Record Homepage Layouts](#) (on page 580).

You can specify custom report and create custom Homepage layouts for the following record types:

- My Homepages
- Accounts
- Contacts
- Lead
- Opportunities
- Service Requests

**Before you begin.** To perform this procedure, the custom reports that you want to enable in a Homepage must have been saved. Your role must include the Customize Application privilege and the Homepage Administration privilege.

### *To specify a custom homepage report*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the *record type* Application Customization page, click the *record type* Homepage Custom Reports link.
- 4 In the Homepage Custom Reports list, click New Homepage Report.
- 5 In the Name field, enter the name of the custom report.
- 6 In the Height and Width fields, select Single or Double.

If you want the report to span the entire Homepage from left to right, set the width to Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.

**NOTE:** Sometimes if the report has a HTML RowSpan attribute value of more than 2, the report spans beyond the specified size.

- 7** If required, select the Execute Report Immediately check box.

If you select this check box, the report will run automatically, and users will not have to click a link to update the report.

- 8** In the Report Path field, enter the path of the report.

You can paste the report path from the Open Analysis window. To copy the report path:

- a** Click the Open Analysis button in the Getting Started with Answers page.
- b** Select a report.
- c** Copy the value in the Item field.

For example:

Shared Folder: Pre-built Analysis/Sales Stage History Analytics: Last Month Sales Report

- 9** Click Save.

## Creating Record Homepage Layouts

For various record types you can create custom Homepage layouts. This feature allows you to provide the most relevant information to different users, including the ability to display custom analytics on Homepages. For example, the Homepage for a customer service representative can be configured to show new service requests instead of new leads, and a custom service-request report instead of the standard sales-pipeline quality report.

If you want to use custom reports in your custom Homepage layouts, you must make them available using the procedure described in [Creating Homepage Custom Reports](#) (on page 579).

You can create custom Homepage layouts for the following record types:

- My Homepages
- Accounts
- Contacts
- Lead
- Opportunities
- Service Requests

You can copy an existing Homepage layout and then modify it to your requirements. You can also edit existing Homepage layouts. The default Homepage layout is read-only. You can copy it but you cannot delete or edit it.

After you create a custom Homepage layout, you must use the Role Management Wizard to assign the layout to the user roles that need to use that layout.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege and the Customize Application – Manage Homepage Customization privilege.

### *To create or modify a Homepage layout*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the *record type* Application Customization page, click the *record type* Homepage Layout link.
- 4 In the Homepage Layout list, do one of the following:
  - Click Edit or Copy to modify an existing layout.
  - Click the New Layout button to create a new layout.

The Homepage Layout Wizard appears to guide you through the process.

- 5 In Step 1 Layout Name, enter a name for the layout, and a description if required.
  - 6 In Step 2 Homepage Layout
    - Move fields from the All Sections list to the Available Sections list.
- The Available Sections list includes the sections that can be added to a Homepage. If you do not want a user to add a section to a Homepage, leave the section in the All Sections list.
- Move fields from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

Leave sections that are double width in the Left Side list. They automatically stretch across the Homepage when it is displayed.

- 7 Click Finish.

**NOTE:** After you add a custom Homepage to the application, you need to make it available to a user role before users can see it. For more information, see [Adding Roles](#) (on page 608).

Users with the Personalize Homepage privilege can edit the layout of their Homepages with any list or report made available by the company administrator.

## Customizing the Audit Trail

You can specify which fields are tracked in the audit trail for the Opportunity and Service request, as well as Fund and Fund Request record types, if those vertical record types are set up for your company. When there are changes to audited fields, an audit trail record is generated.

The auditing of opportunities and service requests is enabled by default for all companies. However, auditing of funds and fund requests might need to be set up for your company.

For each of the record types, you can specify that other fields, both standard and custom fields, are audited. However, there is a maximum number of audited fields allowed for your company across all record types. If you need to increase the maximum number of audited fields, contact Customer Care. The total number of audited fields available, and the number available for the different record types is displayed on the Audited Fields page.

For each of the record types, certain fields are audited by default, as shown in the table. However, the set of fields that are audited by default for Fund and Fund Request record types depends on whether your company used the application before Release 14 and whether these record types were set up for your company as follows:

- **Pre-Release 14 company with Funds and Fund Requests set up.** The default set of fields are audited as shown in the table.
- **Pre-Release 14 company without Funds and Fund Requests set up.** No fields are audited for funds and fund requests.
- **Post-Release 14 company with Funds and Fund Request set up.** No fields are audited by default for these record types. You must select which fields are audited for funds and fund requests.
- **Post-Release 14 company without Funds and Fund Requests set up.** No fields are audited for funds and fund requests.

This strategy ensures that if your company does not use the Fund and Fund Request record types, the default fields listed in the table do not count towards your maximum number of auditable fields. You can allocate the number of fields audited by default for the Fund and Fund Request record types between the Opportunity and Service Request record types.

Record Type	Audited Fields
Opportunity	Revenue, Close Date, Forecast, Sales Stage, Probability, Owner
Service Request	Subject, Description, Area, Cause, Type, Source, Priority, Status, Owner
Fund	Status, Partner, Target Amount, Owner (pre-Release 14 companies only)
Fund Request	Claim Approved Amount, Claim Requested Amount, Claim Decision Date, Due Date, Fund, Pre-approval Decision Date, Pre-approval Requested Amount, Pre-approved amount, Status, Owner (pre-Release 14 companies only)

The following considerations apply to fields regarding auditing:

- For foreign key fields, the name (not the ID) is stored and displayed in the audit trail. For example, if the Account relation on Opportunity is audited, the audit trail displays the account name instead of the Row ID.
- No address fields are available for any of the auditable record types (Opportunity, Service Request, Fund, Fund Request).
- Picklist fields show the user's language dependent values (LDVs).
- ID columns that are not displayed on the layouts are not available for auditing.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege and the Administer Field Audit privilege.

### *To customize the audit trail for a record type*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the *record type* Application Customization page, click the *record type* Field Audit Setup link.
- 4 In the Audit Field Setup page, move fields from the Available fields list to the Audited Fields list as required.

An error message is displayed if you exceed the company limit.

The Available Fields list contains all the standard and custom fields for the record type that are not already audited.

- 5 Click Save.

Auditing of a field becomes effective immediately after it is enabled.

## Specifying Dynamic Page Layouts

Dynamic layouts streamline the application for end users by allowing them to manage only the subset of information that is relevant in a given situation. For example, your company might track several different types of account, such as customer-type accounts, prospect-type accounts, or partner-type accounts. With the dynamic page layout feature, you can configure different layouts that show a different set of account fields and related items, based on the type of account. You can then associate the different layouts with one or more user roles. When the user drills down on a particular account record, the user is shown the appropriate page layout, based on the user's role and the type of account.

When you define dynamic page layouts for a record type, a pre-defined picklist value is used to drive the dynamic rendering of the page layouts. You specify a page layout to be displayed for each value of the picklist. The users can then see different page layouts for different records of the same record type, based on the picklist value that they select in the record.

You must associate your dynamic page layouts with user roles as required. There is a many-to-many relationship between dynamic page layouts and user roles.

Each picklist value has only one layout associated with it, but a page layout can be associated with multiple picklist values. You cannot delete a layout that is already associated with a user role.

The following table shows the predefined driving picklist values for each record type:

Record Type	Driving Picklist
Account	Account Type
Appointment	Type
Campaign	Campaign Type
Contact	Contact Type
Lead	Lead Source
Opportunity	Opportunity Type
Service Request	Type
Solution	Status
Task	Type
Fund	Status
Fund Request	Status
Household	Segment
Portfolio	Account Type
Dealer	Status
Vehicle	Product Type
Vehicle Finance Info	Finance Type
Med Ed	Type

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege and the Customize Application - Manage Dynamic Layouts privilege.

### *To create or modify a dynamic page layout*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the *record type* Application Customization page, click the *record type* Dynamic Page Layout link.



**4** In the Dynamic Page Layout list, do one of the following:

- Click Edit or Copy to modify an existing layout.
- Click the New Layout button to create a new layout.

The Dynamic Layout Wizard guides you through the process.

**5** In Step 1 Layout Name:

- a** Enter a name for the Dynamic Page Layout.
- b** Select a Default Layout Name. This layout is presented as the default layout in the next step.

The Driving Picklist field shows the picklist whose values determine which layout is seen by the users.

**6** In Step 2 Specify Fields, associate each of the picklist values with a layout name.

The layout you select is displayed when a record has the corresponding picklist value.

**7** Click Finish.

## Managing the Behavior of Lookup Windows

You can manage the behavior of *Lookup windows*, which are used with the smart association functionality of Siebel CRM On Demand. Smart associations make it easier for users to associate different record types, such as Account, Contact, Opportunity, Activity, and so on with each other.

For examples, in cases where there is a single association, users can type the name of the associated record and the application automatically attempts to resolve the association. For example, when creating a task, users can type an account name in the Account field. When the user saves the record, the application then automatically searches for accounts that match. If a unique match is found, the appropriate account is used. If no matches or multiple potential matches are found, the user is presented with a Lookup window where they can perform additional searches or pick the appropriate account. Rather than use this auto-resolve feature, the user can also click the Lookup icon to display the Lookup window directly.

In addition, certain areas of the application allow multiple associations. For example, users can associate multiple contacts with tasks, as they are creating or editing the task. (This multi-association control is not provided in the default page layout, so you must add it to the page layout.) On the Task Edit screen, when the user clicks the Lookup icon to associate contacts, the Lookup window is pre-filled with contacts associated with the account that was specified for the task. The user can then select one or more contacts in this Lookup window to associate those contacts with the task. This capability is not available for all associations. It exists only for certain configured association controls. For example, if the Account field in a Task record has a valid value, and you click the Lookup icon for Opportunities, the window is not pre-filled with records, but the user can select a list of opportunities from the drop-down list.

Two options are available for configuring the behavior of the Lookup window for each record type:

- **Execute Default List on Lookup Window.** If this option is selected, the list of available records is displayed in the Lookup window when it is opened. If the option is not selected, no records are displayed when the Lookup window is opened. This option is selected by default.
- **Auto-resolve Enabled.** If this option is selected, smart associations are automatically resolved. If it is not selected, smart associations are not automatically resolved, and the user must click the Lookup icon and use the Lookup window. This option is selected by default.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To manage the behavior of the Lookup windows*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the *record type* Application Customization page, click the *record type* Lookup Window Setup link.
- 4 In the Lookup Window Setup page, select or clear the following check boxes:
  - Execute Default List on Lookup Window
  - Auto-resolve Enabled
- 5 Click Save.

For the options to take effect, you must sign out of the application and sign in again.

## Displaying External Web Pages in Tabs

You can display Web content in a tab within Siebel CRM On Demand. The Web content can be external Web pages or company data available from the Web. For example, you might track inventory information in another Web application, which you want to make available to your service representatives when they are working in Siebel CRM On Demand. To address this requirement, you can create a custom Web tab to display your external Web application within the main content area of Siebel CRM On Demand.

You can also create custom Web applets to contain Web content. For information about custom Web applets and how they compare with custom Web tabs, see [About Custom Web Applets](#) (on page 588).

To make a custom Web page visible, you must add the tab to the required user role using the Role Management Wizard.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

Before you can display external information on a Siebel CRM On Demand page, you must ensure that:

- Web services are enabled for your company
- The external application has a Web interface
- The external application or Web page does not require full control of the browser window

### *To display an external Web page in a tab*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Application Setup section, click the Custom Web Tabs link.
- 4 On the Custom Tab List page, click New.
- 5 On the Custom Web Tab page, fill in the required information.
  - a For User fields, select an option from the User Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor.

For example, if you choose User id from the drop-down list, %%%User id%%% is inserted into the URL, depending on where your cursor is positioned. At run-time, this parameter is replaced with the user ID of the user who is signed in.
  - b For Url, enter the URL that is invoked when the user clicks the hyperlink, such as `www.oracle.com/siebel`.

You do not need to enter the `http://` part of the URL.

You can also include context-sensitive parameters here by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value based on the current record when the user clicks the value.

If you do not specify any URL, the user is directed to a void URL when clicking the tab.

**NOTE:** Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser when they click the Web tab.

- c (Optional). For Frame Height, enter a height in pixels for the frame in which the Web page is displayed.

For Frame Width, enter a width in pixels for the frame in which the Web page is displayed.

By default, the Web Page displays in the Tab detail page

- 6 Click the lookup icon next to the Icon label, and select an icon from the window.
- 7 Save the record.
- 8 (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

**NOTE:** If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation Language drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

**NOTE:** After you add a custom Web page to the application, you need to make it available to the user role before users can see it. For instructions, see [Adding Roles](#) (on page 608).

## About Custom Web Applets

Custom Web applets allow you to embed external Web content within:

- A record type's Details page
- A record type's Homepage
- My Homepage
- The Action bar

You can create three types of Web applet, which allows you to embed different types of Web content:

- **Feed.** Used to embed RSS feeds. For example, you might want to embed a news feed on My Homepage.  
**Note:** Only the RSS 2.0 standard is supported.
- **HTML.** Used to embed content that you want to make additions to in the HTML code. You might use this type to embed Web widgets from an external source. For example, you might embed Google Maps in this way.
- **URL.** Used to embed a URL that is rendered in an IFrame. IFrames are commonly used to insert content from external Web sites. For example, you might have a custom Web applet on the Lead Details page that allows you to see the google.com log-in page.

You can add a Web applet for any record type for which the Page Layout links are visible.

There are two advantages to creating a custom Web applet rather than a custom Web tab:

- A custom Web applet that is displayed on a page, such as Lead Details, allows you to view data on the Details page together with other data. On the other hand, if your external data is viewed using a Web tab, when you click the Web tab, you are directed away from the Details page, and redirected to the Web tab page.
- Your company might have a great deal of information that you want to display, for example, portfolio holdings. Custom Web applets allow you to show a large amount of data content from another Web site without requiring that you load the information into the CRM On Demand application. Loading large amounts of data into CRM On Demand requires integration to manage large numbers of data columns.

For information about creating Web applets for a record type, see [Creating Web Applets](#) (on page 574). For information about creating Web applets for My Homepage, see [Creating Global Web Applets](#) (on page 593).

## Creating Custom Web Applets

You can create three types of custom Web applets and add them to the following places in the application:

- For global Web applets:
  - The Action bar
  - My Homepage
- For record type Web applets:
  - The homepage
  - The Detail page

The following sections describe how to create the different types of custom Web applet.

### Creating an RSS Feed applet

Create this type of applet for RSS feeds that you want to embed in the application.

You should configure RSS feed applets for content that is relevant to user roles. You can make RSS feed applets configurable by users, but it is recommended that you only make a small number of applets configurable.

If you add an RSS Feed applet to the Action bar, and make the records available in a custom Web Tab, it makes the feeds easier to read for users because they do not have to navigate to a different page.

### *To create an RSS feed applet*

On the Web Applet page, complete the following fields and click Save.

Field	Comments
Type	Select Feed.
User Fields	<p>Select an option from the User Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor.</p> <p>For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At runtime, this parameter is replaced with the user ID of the user who is signed in.</p>
Record Type Fields	<p><b>For Detail Page Location only</b></p> <p>Place your cursor in the URL field where you want to add a parameter, and then select the field that you want to include from the drop-down list.</p> <p>For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.</p>
URL	<p>Enter the URL that is invoked when the user clicks the hyperlink, such as <a href="http://www.google.com">http://www.google.com</a>.</p> <p>You must include the <code>http://</code> part of the URL.</p> <p>You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the user clicks the value.</p> <p>If you do not specify any URL, the user is directed to a void URL when clicking the link.</p> <p><b>NOTE:</b> Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser.</p>
Let users override URL	<p>Select Yes if you want to make the Web applet configurable by the user.</p> <p>If you select Yes, a Configure link is displayed with the feed.</p>
Open Records in	Select a value depending on whether you want records to open in the current browser window or a new browser window.

Field	Comments
Height	<p><b>For Detail pages, this field applies to the Feed type only.</b></p> <p>Specify the height in pixels of the custom Web applet. The default value is 100 pixels.</p> <p>You cannot control the width of the applet. For a homepage, the applet is displayed on one side of the page.</p>

## Creating an HTML Web applet

Create this type of applet for embedded content that you want to make additions to in the HTML code.

### *To create an HTML Web applet*

On the Web Applet page, complete the following fields and click Save.

Field	Comments
Type	Select HTML.
User Fields	<p>Select an option from the User Fields drop-down list to add user parameter fields to the Web Applet HTML field at the current position of the cursor.</p> <p>For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At runtime, this parameter is replaced with the user ID of the user who is signed in.</p>
<i>Record Type Fields</i>	<p><b>For Detail Page Location only</b></p> <p>Place your cursor in the Web Applet HTML field where you want to add a parameter, and then select the field that you want to include from the drop-down list.</p> <p>For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.</p>

Field	Comments
Web Applet HTML	<p>The URL that you enter is used in the src attribute of an &lt;iframe&gt; element within the HTML code of the page to which you add the Web applet.</p> <p>Any code that you add to the Web Applet HTML field is added to the &lt;iframe&gt; element. You can include references to JavaScript files that you embed in the &lt;head&gt; section of the HTML.</p> <p><b>The referencing of JavaScript files supplied in CRM On Demand pages is not supported.</b></p> <p>You must be familiar with HTML coding before you edit this field.</p>
Height	<p><b>For Detail pages, this field applies to the Feed type only.</b></p> <p>Specify the height in pixels of the custom Web applet. The default value is 100 pixels.</p> <p>You cannot control the width of the applet. For a homepage, the applet is displayed on one side of the page.</p>

## Creating a URL Web Applet

Create this type of applet for embedded content in which the specified URL is rendered in an IFrame.

### *To create a URL Web applet*

On the Web Applet page, complete the following fields and click Save.

Field	Comments
Type	Select URL.
User Fields	<p>Select an option from the User Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor.</p> <p>For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At runtime, this parameter is replaced with the user ID of the user who is signed in.</p>



Field	Comments
<i>Record Type Fields</i>	<p><b>For Detail Page Location only</b></p> <p>Place your cursor in the URL field where you want to add a parameter, and then select the field that you want to include from the drop-down list.</p> <p>For example, if you select the field Row id, <code>%%%Row id%%%</code> is inserted. At run-time, this parameter is replaced with the row ID of the current record.</p>
URL	<p>Enter the URL that is invoked when the user clicks the hyperlink, such as <code>http://www.google.com</code>.</p> <p>You must include the <code>http://</code> part of the URL.</p> <p>You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User Fields drop-down list. This action places a field parameter in the URL (designated by <code>%%%fieldname%%%</code>), which is replaced by the field value, based on the current record when the user clicks the value.</p> <p>If you do not specify any URL, the user is directed to a void URL when clicking the link.</p> <p><b>NOTE:</b> Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser.</p>
Height	<p><b>For Detail pages, this field applies to the Feed type only.</b></p> <p>Specify the height in pixels of the custom Web applet. The default value is 100 pixels.</p> <p>You cannot control the width of the applet. For a homepage, the applet is displayed on one side of the page.</p>

## Creating Global Web Applets

A global Web applet is a custom Web applet that can appear on a homepage or on the Action bar.

When you create a global Web applet, you must add it to the layout for the homepage or Action bar.

**Before you begin.** To perform this procedure, your role must include the Customize Application and Manage Custom Web Applets privileges.

### *To create a new global web applet*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Application Setup section, select Global Web Applets.
- 4 In the Web Applet list, click New.
- 5 On the Web Applet page, complete the following fields:

Field	Comments
Name	Enter a name.
Location	Select Homepage or Action bar, depending on whether the external content is to appear on a homepage or on the Action bar.

Next, complete the fields according to the type of applet you require, as described in [Creating Custom Web Applets](#) (on page 589).

## Customizing My Homepage for Your Company

Depending on their needs, employees at your company might want to see different information on their My Homepage page. You can customize the layout of My Homepage by replacing the default content with content that is more relevant to the roles of the employees. For example, you might configure the Homepage for a customer service representative to show new service requests instead of the Recently Created Leads section that is standard on that page, and a custom service-request report instead of the standard sales pipeline quality report.

After you have customized My Homepage, you must assign the Homepage layout to a user role. All users with that role see the customized My Homepage that you set up.

**Before you begin.** Because you must select a role that this customization applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customize Application privilege and the Homepage Administration privilege.

### *To customize My Homepage for your company*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Application Setup section, click the My Homepage Layout link.

- 4 In the Homepage Layout list, do one of the following:
  - Click the New Layout button to create a new layout.
  - Click Edit or Copy to modify an existing custom layout.

The Homepage Layout Wizard appears to guide you through the process.
- 5 In Step 1 Layout Name, enter a name for the layout, and a description if required.
- 6 In Step 2 Homepage Layout:
  - Move sections from the All Sections list to the Available Sections list.

The Available Sections list includes the sections that can be added to a Homepage; this includes any custom reports that you have enabled for inclusion in Homepages. If you do not want a user to add a section to a Homepage, leave the section in the All Sections list.
  - Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

Leave sections that are double width in the Left Side list; they will automatically stretch across the Homepage when it is displayed
- 7 Click Finish.

**NOTE:** After you add a custom homepage to the application, you need to make it available to the user role before users can see it. For instructions, see [Adding Roles](#) (on page 608).

## Enabling Custom Reports in My Homepage

You can specify the custom reports that can be added to a custom My Homepage layout. These custom reports are then displayed in the Available Sections list in Step 2 in the Homepage Layout Wizard. For more information about customizing My Homepage, see [Customizing My Homepage for Your Company](#) (on page 594).

**Before you begin.** To perform this procedure, the custom reports that you want to enable in My Homepage must have been saved. Your role must include the Customize Application privilege and the Homepage Administration privilege.

### *To specify a custom Homepage report*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Application Setup section, click the My Homepage Custom Reports link.
- 4 In the My Homepage Custom Reports list, click New Homepage Report.

- 5 In the Name field, enter the name of the custom report.
- 6 In the Height and Width fields, select Single or Double.

If you want the report to span the entire Homepage from left to right, set the width to Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.
- 7 If required, select the Execute Report Immediately check box.

If you select this check box, the report will run automatically, and users will not have to click a link to update the report.
- 8 In the Report Path field, enter the path of the report.

You can paste the report path from the Open Analysis window. To copy the report path:

  - a Click the Open Analysis button in the Getting Started with Answers page.
  - b Select a report.
  - c Copy the value in the Item field.

For example:

Shared Folder: Pre-built Analysis/Sales Stage History Analytics: Last Month Sales Report
- 9 Click Save.

## Renaming Record Types

To use terminology that is familiar to your users, you might want to rename record types. The default record type names in the application might not be the same as those used by your company for certain types of records. If this is the case, you can change the name to meet your specific requirements.

When you change the name of a record type, the new name appears in most places in the application, such as:

- Tabs and buttons
- Drop-down lists
- Predefined filtered lists, such as the All Accounts list on the Accounts Homepage
- Title bars on pages, such as on record detail and list pages
- The Create section in the Action bar
- Page section names
- Record assignment email notification
- Customized page section names

For example, you can change the Account display name to Company. The Account tab becomes Company and other section titles change accordingly.

However, there are several places in which the new name does not appear. If you change names, inform your users that the new names do not appear in:

- Custom filtered list names
- Custom field names
- Reports and Analyses
- Siebel On Demand Outlook Email Integration
- Siebel PIM Sync On Demand
- Help pages

**CAUTION:** Renamed record types show up with their original default names within the Role Management Wizard, not with their new display names.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

#### *To rename a record type*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.
- 3 In the Application Setup section, click the Rename Record Types link.
- 4 On the Rename Record Types page, type the new names in the appropriate row. You must supply all three variations for the application to use in the appropriate areas of the interface: Display Name/Singular, Display Name/Plural, and Display Name/Short.

**NOTE:** The Display Name/Short appears in the tabs, so it should not exceed 15 characters.

- 5 (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

**NOTE:** If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation Language drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previously translated display names remain, unaffected by the change you made here.

- 6 To manually enter the translated equivalent of the new name:
  - a From the Translation Language drop-down list, select the language whose translation you want to enter.

- b** Enter the translated equivalent in the appropriate Display Name field and click Save.
- c** Click the link to return to the page you just updated and select the language again, if necessary.

The translated name appears in black text in the Display Name column.

## Changing the Icon for a Record Type

You can change the icon that is associated with a record type, and which is displayed on tabs and in the Create section in the action bar.

**Before you begin.** To perform this procedure, your role must include the Customize Application privilege.

### *To change the icon for a record type*

- 1** In the upper-right corner of any page, click the Admin global link.
- 2** Click the Application Customization link.
- 3** In the Application Setup section, click the Rename Record Types link.
- 4** On the Rename Record Types page, click the icon.
- 5** Select an icon from the popup window.

## Adding Record Types

You can add up to three record types to your company's application. For example, you might want to display an Order tab for your employees to use.

The overall steps for adding a record type to the application are:

- 1** Rename one of the Custom Object record types to meet your requirements. Depending on what is set up for your company you might have Custom Object 1, Custom Object 2, and Custom Object 3 record types set up for your company.
- 2** Set up the fields for the record type. Define the fields to be displayed on the new record type detail page. A set of fields is automatically included on the Field Setup page. You can rename and use these fields and create custom fields based on your requirements.
- 3** Create page layouts for the customized record type as required.

- 4 Provide access to the new pages layout and related information sections for the appropriate user roles.

Each new record type you add appears in these areas:

- Create section in the Action bar
- Search section in the Action bar
- Record Homepage with a tab (a default icon appears in the tab along with its name)

By default, the new record Homepage contains two sections: record Lists section and Recently Modified record section. You need to set up fields, page layouts (Detail and Edit pages), and so on, for each record type you add.

New record types work in the same way as the record types provided by default. You can set up fields, page layouts, and list pages for them. And each contains a default set of fields, including three fields to search on (the name field and two quick search fields) and eight to filter or sort on.

However, you cannot use new record types in:

- Assignment Manager
- forecasting
- audit trails
- Default Group Assignment (they cannot be shared through groups)

In addition, they have these restrictions:

- New record types cannot contain the country-specific address groups.
- Web Services supports only the first two new record types (Custom Object 1, Custom Object 2).
- By default, only the Name field is required in new record types.
- No duplicate checking is performed on the new record type.
- You cannot import or export new record types.

**Before you begin:**

- If your company wants to add more record types, contact Customer Care to set that up for you. The capability is not provided in the standard application.
- The Custom Object 1, 2, or 3 record types must be set up for your company.
- To perform this procedure, your role must include both the Administer Custom Object and the Customize Application privileges.

***To add a record type***

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.

- 3 In the Application Setup section, click the Rename Objects link.
- 4 In the Custom Object 1, 3, or 3 row, fill in the information, for example enter Order.  
For more information see [Renaming Record Types](#) (on page 596). After you rename the record type, it appears under this name in the Record Type Setup sections on the Application Customization page, replacing the link for Custom Object 1, 2, or 3.
- 5 Click Save.
- 6 In the Record Type Setup section on the Application Customization page, click the link for the new record type.
- 7 In the Field Management section, click the Field Setup link.
- 8 On the Field Setup page, you can do the following:
  - (Recommended) Click Rename Fields and relabel the Name field.  
The Name field is the field that the system displays for this record type. It appears in Deleted Items, the Recently Viewed section in the Action bar, and Lookup windows.  
Throughout the application, each record type has a field called Name, which is preceded by the record type (Account Name, Opportunity Name, and so on). Therefore, if you are adding an Order tab, you could relabel the Name field to Order Name.
  - Click New Fields and add custom fields.  
The same restrictions exist for these record types as for custom fields for the default record types.
  - Click Rename Fields and specify the fields to search on for this record type. Fill in the Quick Search 1 and Quick Search 2 rows with the required field names. If your company uses Targeted Search, then these fields are displayed in the Search section in the Action bar.  
For example, if you are adding an Order tab, you might want to designate an Order Number field as one of these Quick Search fields. When an employee selects Order from the Search section, Order Number appears as a field to search on.
  - Click Rename Fields and specify the fields to see as column headings in lists. Fill in the Indexed rows with the required field names. This determines the fields you can use to sort and filter records.
- 9 Set up Edit and Detail pages for the new record type.  
You can add fields to the record Edit pages, group the fields into separate sections, and rename those sections.  
To create relationships with other record types, add the fields (Account, Contact, Opportunity, and so on) to the page layouts. This creates a Lookup icon next to the field, where users can link existing records to this new record type.



You can add related information sections to the Detail pages.

When you add Team as a related information section, users can share this record with team members on a record-by-record basis.

For instructions, see [Customizing Static Page Layouts](#) (on page 570).

**10** (Optional) Add the new record type as a field in other record Edit pages or as a related information section in other record Detail pages.

**11** Add the page layout to user roles as required. For instructions, see [Adding Roles](#) (on page 608).

## About Fields, Picklists, and Metrics

The application does not allow you to change field names or picklist values that it uses for forecasting and reports. However, some of the prebuilt lists, such as lists on Homepages, select records to include based on the picklist values. The application uses the underlying, language-independent code to determine what records to include in the standard lists. Therefore, you can rename picklist values and fields without affecting those lists.

## User Management and Access Controls

### Before you begin:

- To set up users, groups, profiles and roles at your company, your role must include the Manage Users and Access privilege.
- To set up territories at your company, your role must include the Manage Territories privilege.
- Compare the number of licenses against the number of users that need to be active. Only active users can access Siebel CRM On Demand. Your active user total cannot exceed the number of licenses for your company. See [Verifying License Statuses and Active Users](#) (on page 536).
- Read the background information on roles and access profiles. See [About Roles and Access Profiles](#) (on page 602).
- Determine what profiles you will use, to manage data access for books, roles and teams.
- Determine what role each user should be assigned and to whom each user reports. If your organization needs additional roles to accommodate multiple lines of business, create the new ones you need.

The cumulative setup of all users at your company defines your company's reporting hierarchy and sales quotas.

Individually, for each user at your company, you must specify a user role. A user's role and associated access profile determine an employee's access to tabs, features, and records. They also determine which page layouts the employee sees when using the application.

By default, the application provides a set of profiles and roles that covers most company's needs. However, if your company needs several different page layouts for the same default role, you can copy existing roles and customize page layouts further for the new roles. That way, a sales manager in one industry will see one set of fields while a sales manager in another industry will see a different set of fields.

For example, your company may have two distinct sales forces: one focused on Install Base Account Management and the other focused on New Business. Install Base Field Sales Reps track account information about their customer deployments. New Business Field Sales Reps track account information that profiles the purchasing requirements of their prospect accounts. Although these two job duties are very similar, the type of information most relevant to support their daily processes is quite different. By copying the Field Sales Rep role, you are able to create two roles and design page layouts that support the unique business requirements of the two sales forces.

Click a topic to see step-by-step instructions for the procedures pertaining to management of Users, Groups, Books, Profiles and Roles:

- [Setting Up Access Profiles](#) (on page 606)
- [Adding Roles](#) (on page 608)
- [Setting Up Books](#) (on page 626)
- [Setting Up Users](#) (on page 611)
- [Setting Up Groups](#) (on page 621)
- [Changing Users' Email Addresses](#) (see "Changing a User's User ID" on page 618)
- [Setting Up Users' Sales Quotas](#) (on page 617)
- [Resetting a User's Password](#) (on page 619)
- [Reviewing Sign-In Activity for a User](#) (on page 620)
- [Deactivating Users](#) (on page 620)
- [Setting Up Territories](#) (on page 623)

**TIP:** Consider setting up a test user for each role. Then activate the test users to make sure the configurations are set up correctly before activating other users. Do not activate other users until you have completed all user setup activities, including access rights, role layout, reporting and data sharing hierarchy, workflow and any other business process customization. Remember to deactivate test users when testing is complete.

## About Roles and Access Profiles

Users' roles and access profiles determine their access to tabs, features, and records. Each user has only one role, but the same role can be assigned to multiple users.

Access profiles are the components of roles that manage access rights to record types and their related information. The same access profile can be assigned to multiple roles, teams and books.

## Choosing roles for your users

Determine how each employee or groups of employees will use the application. Examine the job functions of your employees to determine:

- What tasks they need to complete and which records they need to access
- What kind of access they need to each type of record
- If there are records or tabs that they should not be able to access at all.

The following table shows some examples.

Access Type	Example
Feature access	The Inside Sales Rep role provides access to the Convert button on the Lead Detail page.
Record access	The Executive role provides edit access to all opportunity records, regardless of the owner.
Tab access	By default, the Accounts and Opportunities tabs are accessible to a user with the Sales & Marketing Manager role, but not the Service Requests or Solutions tabs.

Review the characteristics of each of the prebuilt roles to determine if these roles meet the needs of your employees. The User and Role Setup Template, available in the Tools and Templates area of the Training and Support Center, contains information about the predefined roles, listing their record access, privileges, and default tab access. Keep in mind that the names of the prebuilt roles will not necessarily match your company's job titles. You must match job functions and tasks to the roles, not job titles.

If a prebuilt role is close to what you need for an employee group, copy and edit it to match it to your requirements. If no prebuilt role is close to what you need, create a new role from scratch to match your requirements.

Use the User and Role Setup Template to help you document the role requirements of your employee groups. Then, have the completed template available when you create or edit roles and set up your company's employees as users in the application.

For more information on roles, see [Adding Roles](#) (on page 608).

For more information on profiles, see [Setting Up Access Profiles](#) (on page 606).

## About Groups

Group Management is an optional feature that gives your company the ability to set up teams of people who work together, allowing them to share a common set of information.

Setting up groups at your company allows users to do the following:

- Group members can access a merged calendar, showing the availability for all members in their group. This allows employees to determine the best time to schedule appointments and to notify employees (and contacts) of appointments.

**NOTE:** Users must have the Share Calendar privilege assigned to their role to be able to access the merged group calendar. Users who have the Share Calendar privilege can also set up custom calendar views. For more information, see [Viewing Others' Calendars](#) (on page 99) and [Adding Custom Calendar Views](#) (on page 101).

- Group members can share ownership of activity, account, contact, opportunity, household, and portfolio records automatically.

The new records that any member in the group creates are jointly owned by all members in the group. For example, if an employee belongs to group XYZ, an account that employee creates appears in the account lists for all members in that group. On that account record, the employee's name appears in the Owner field, the group name appears in the Primary Group field (if the company administrator added this field to your layout), and all group members can update the record.

By default, the current group's members have full access to group records that were created after the member joined the group. The details about appointment, task, and contact records that are marked Private cannot be read by other group members.

**NOTE:** For this functionality to work, the Default Group Assignment option in the Company Profile page must be selected. The option must be selected before the groups are created.

**CAUTION:** Before you set up or change a group, you must select the Default Group Assignment option in the Company Profile page even if you do not plan to use the default group assignment functionality. If you do not select this option before you set up or change a group, the group will not perform correctly. If that happens, you must delete the group, select the Default Group Assignment option in the Company Profile page, and then create the group again.

If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, deselect the Default Group Assignment option when you have finished creating the groups and adding members to the groups. If you later decide to make any changes to the groups or group membership, select the Default Group Assignment option again before you make the changes, and deselect it when you have finished making your changes.

This behavior applies to groups:

- Each user can belong to only one group.

After a user is added to a group, his name no longer appears on the user list when selecting group members.

- If you select the group assignment option at your company:

- Records that exist before a group is defined are not updated unless the Owner field is updated with a new owner belonging to a group.
- When a user joins a group, the user gains access to the group's records. However, records owned by the new group member prior to the user joining the group are not automatically visible to the existing group members. If a user becomes the owner of records after the user is added to a group, the new records are visible to other group members.

The following example illustrates group record ownership:

- User 1 and User 2 belong to Group 1. User 3 does not belong to Group 1.
  - User 3 owns Account 31. User 1 and User 2 will not have access to Account 31.
  - User 3 is added to Group 1. User 1 and User 2 still will not have access to Account 31.
  - User 3 becomes owner of Account 32. User 1 and User 2 will have access to Account 32.
- If users are deleted from a group, they are removed from all shared records that the group owns. They retain access to their private records.

## Groups versus Teams

The application distinguishes between *Groups* and *Teams*:

- Groups are set up by the company administrator and apply to entire sets of records across the company. The Group feature must be enabled by Customer Care or by the company administrator when the company is set up for Siebel CRM On Demand.
- Teams are set up by the record owners or company administrators and apply to only those records that allow teaming: accounts, contacts, opportunities, households, portfolios and custom objects. To set up a team to access the record, the owner must explicitly share that record through the Team section on the record Detail page.

## Related Information

See the following topics for related information about groups and sharing calendars:

[Setting Up Groups](#) (on page 621)

[Viewing Others' Calendars](#) (on page 99)

[Adding Custom Calendar Views](#) (on page 101)

## Setting Up Access Profiles

You can use access profiles to control access for roles, teams, and books. You can set up default profiles to specify the access levels to the records that are not owned by the user. You can set up owner profiles to specify the access levels to the records owned by the user, by the user's group, or by someone who reports to the user (if manager visibility is enabled). You can assign a single profile to multiple roles. You can add profiles by:

- Creating new profiles from scratch
- Copying existing profiles and editing their access levels.

There are two types of Access rights that you can set:

- **Default Access:** Sets the access levels for records not owned by the user, or by the user's group.
- **Owner Access:** Sets the access levels for records owned by the user, by the user's group, or by someone who reports to the user (if manager visibility is enabled).

You may decide that a group of users with a role such as Field Sales Rep may only view those records explicitly shared with them. In this case:

- Their default access would be Read-only.
- In Step 2 of the Role Management wizard, the check boxes in the Can Read All Records column would not be selected.

**Before you begin.** To set up access profiles at your company, your role must include the Manage Users and Access privilege.

### *To set up an access profile*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the Access Profile Management section, click the Access Profiles link.
- 4 In the Access Profile List, do one of the following:
  - To create a new profile from scratch, click the New button on the title bar.
  - To edit an existing profile, click the Edit link to the left of the profile name.
  - To create a new profile based on an existing one, click the Copy link to the left of the profile name.

The Access Profile wizard guides you through the process.

**NOTE:** You can use three profiles (Edit, Full and ReadOnly) to assign to Teams.

- 5 In Step 1, Access Profile Name, provide a name and description. The remaining fields are described in the table.

Field	Description
Mark for Translation	Shows text fields in the languages activated for your company.
Grantable to Team Members	Profile can be assigned to team members.
Grantable to Book Users	Profile can be assigned to book users. For more information, see the Associating Users With Books section in <a href="#">Setting Up Books</a> (on page 626).
Disabled	Profile cannot be assigned, but existing assignments continue to work.

- 6 In Step 2, Specify Access Levels,

- a Select the access level for the top-level profile. Choose from:

- Read-Only
- Read/Edit
- Read/Edit/Delete

- b Most profiles have a Related Information link. Click this link to specify the access levels for related information for each record type. Related information appears on the record Detail pages as linked records. Depending on what you set in this field and in Role Management, the user is able to create, update, or view those records.

Select the access level for the related information type. Choose from:

- Read/Create
- Read/Create/Edit
- Read-Only
- Read/Edit
- Read/Edit/Delete
- Full
- No Access

## About Lead Conversion Access Settings

The following table shows the minimum settings that allow users to convert leads to opportunities.

Record Type	Related Information	Default Access	Owner Access
<b>Account</b>		Read, Create, Edit	Read, Edit, Delete
	Address	Read, Create, Edit	Read, Create, Edit
<b>Contact</b>		Read, Create, Edit	Read, Edit, Delete
	Accounts	Read, Create	Read, Create
	Addresses	Read, Create, Edit	Read, Create, Edit
<b>Activity</b>		Read, Edit	Read, Edit
<b>Lead</b>		Read, Create, Edit	Read, Edit, Delete
	Completed Activities	View	View
	Open Activities	View	View
<b>Opportunity</b>		Read, Create, Edit	Read, Edit, Delete
	Revenue	Read, Create, Edit	Read, Create, Edit

## Adding Roles

You can add roles to the application by:

- Creating new roles from scratch
- Copying existing roles and editing their privileges and access

When you need users with the same role to see different page layouts, it is easier to copy an existing role. Copying a role retains the access privileges of the original role, but it allows you to customize pages so that users assigned those roles are presented with only the views and fields relevant to their work.

For example, your North American and EMEA Executives might need to view opportunity information in different ways, requiring different fields and page layouts for each set of users. To accommodate that, create two different roles based on the default Executive role: Exec - North America and Exec - EMEA.

After you add a role, you need to create page layouts associated with that role.



**NOTE:** The application bases all copied roles on the original default roles, even if you copy a role you already added. For example, if you copy the Admin role and name it Admin - Europe and then copy the Admin - Europe role to create Admin - Asia, the new role is based on the original Admin role, not the Admin - Europe role.

**Before you begin.** To set up roles at your company, your role must include the Manage Users and Access privilege.

### *To add a role*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the Role Management section, click the Role Management link.
- 4 From the Translation Language drop-down list, select your company's primary language.
- 5 Do one of the following:
  - To copy a role, click the Copy link for the role you want to copy.
  - To create a role from scratch, click the New Role button.The Role Management wizard appears, to lead you through the process.
- 6 In Step 1, Role Name:
  - a Enter the role name and description.
  - b (Optional) To indicate that this role name needs to be translated to other languages activated for your company, select the Mark for Translation check box.
  - c (Optional) To set the default sales process for new opportunities created by users assigned this role, select an option in the Default Sales Process field.For more information about this option, see [Setting Up Sales Processes, Categories, and Coaches](#) (on page 647).
- 7 In Step 2, Record Type Access:

**NOTE:** If you renamed a record type, its original default name appears in these steps, not its updated display name.

- Select the access levels for each record type. This table describes the levels.

Access	Description
Has Access	Users can view records. If you clear this check box, users have no access to this record type, and will not see the record type in their toolbar.

Access	Description
Can Create	Users can add new records.
Can Read All Records	Users can view all records and, depending on their access profile, they may or may not be able to update or delete them.

**NOTE:** You must save your changes, sign out and sign in again for the changes to take effect.

For the minimum settings needed to allow users to convert leads to opportunities, see [Setting Up Access Profiles](#) (on page 606).

**8** In Step 3, Access Profiles, choose the access profiles to assign to this role:

- a** The default access sets the access levels for records not owned by the user (or by the user's group).
- b** The owner access sets the access levels for records owned by the user, by the user's group, or by someone who reports to the user (if manager visibility is enabled).

**NOTE:** For more information about access profiles, see [Setting Up Access Profiles](#) (on page 606).

**9** In Step 4, Privileges:

- Select the privileges to assign to the default user of this role. Privileges are organized alphabetically by Category.

**10** In Step 5, Tab Access and Order:

- Move tabs that users see by default to the Selected Tabs section.  
  
You can move a range of tabs at once by selecting the top one, holding down the Shift key, and clicking the last one in the range. Then click the right or left arrow.
- Move tabs that users do not see by default, but can add, to the Available Tabs section.
- Move tabs that you want hidden from users to the Not Available Tabs section.  
  
For example, if you want field sales reps to never be able to see service requests at your company, move the Service Request tab to the Not Available Tabs section.
- Use the up and down arrows in the Selected Tabs section to define the order in which tabs are displayed.

**11** In Step 6, Page Layout Assignment:

- For each record type, choose if the Page View is static or dynamic, then select from the list of page layouts available for that view type.

For more information on page layouts, see [Application Customization](#) (on page 549).

**12** In Step 7, Search Layout Assignment:

- For each record type, select from the list of available search layouts.

For more information on search layouts, see [Application Customization](#) (on page 549).

**13** In Step 8, Homepage Layout Assignment:

- For each record type, select from the list of available homepage layouts.

For more information on homepage layouts, see [Application Customization](#) (on page 549).

**14** Click Finish.

**NOTE:** If you selected the Mark for Translation check box, the new role (untranslated) appears in blue text and brackets when you choose another language from the Translation Language drop-down list.

**15** To manually enter the translated equivalent of the new role name:

- a From the Translation Language drop-down list, select the language.
- b Click the Edit link next to the role.
- c Enter the translated equivalent in the Role Name field (50-character limit) and click Save.

The translated name appears on the Role List page.

## Setting Up Users

When setting up users, follow this general process:

- 1** Create a user record and enter the user detail information.
- 2** Assign a role to the user (Role field).
- 3** Users' roles determine their access to tabs, features, records, and page layouts.
- 4** Specify the manager that the user reports to (Reports To field).

The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as reports for managers and executives.

- 5** Activate the user when you want the user to start using the application (Status field) and, to notify the user about their activation, (Email Temporary Password When I Click Save check box).

Alternatively, you can import your user records using the import assistant. For more information about this option, see [Import and Export Tools](#) (on page 668).

**NOTE:** You cannot delete users. When an employee leaves your company, change the Status for that user to Inactive.

The following procedure includes steps for doing the entire sequence in the recommended order.

**TIP:** Enter users who are at the top of the reporting hierarchy first.

**Before you begin.** To set up users at your company, your role must include the Manage Users and Access privilege.

### *To set up a user*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, do one of the following:
  - To add a new user, click New User.
  - To add several users quickly, click Quick Add.

This opens the Quick Add page for you to enter required, limited information for each user. For example, it does not allow you to specify the reporting hierarchy.

**Note:** You cannot use the Quick Add method if you have defined any other required User fields in addition to those on the Quick Add page.

After entering information in the Quick Add window, click Save. This takes you to the User List page.

  - To edit a user's information, click the user's last name and, on the User Detail page, click the Edit button.
- 5 On the User Edit page, complete the information. For more information, see [User Fields](#) (on page 613).
- 6 Save the record.

**TIP:** You can limit the user records you see by creating filtered lists. For instructions, see [Working with Lists](#) (on page 56).

**To open a filtered list for users**

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, select an option from the drop-down list.

## User Fields

To edit user fields, your role must include the Manage Users and Access privilege.

When setting up a user, these three fields require special care: Status, Reports To, and Role fields. Entries for these fields determine what the user can access, view, and do.

This table describes some field information for users. The fields you see might differ from those in this table. To see all the fields listed in this table your role must include the Manage Users and Access privilege. The fields that you see will be read-only. Also, the fields might differ depending on whether you are viewing the User Detail page after navigating from the User List page, or after drilling down on a user name in a record. These differences occur because different page layouts are used for these detail pages. For more information about user page layouts, see [About User Page Layouts](#) (on page 615).

Field	Description
<b>Key User Information section</b>	
Status	Set to Active. For information on the sequence for setting up users' passwords and activating users, see <a href="#">Resetting All Passwords</a> (on page 541).  <b>NOTE:</b> The application does not allow you to delete users. When an employee leaves your company, change the Status for that user to Inactive.
Reports To	Select the manager for the user. Each user must report to a manager for reporting and forecasting purposes.
Role	Assign the role according to the access you want to give to that user. To learn about roles, see <a href="#">About Roles and Access Profiles</a> (on page 602).
Primary Group	Group that this user has been added to. Read-only.
Default Analytics Look In Setting	(Optional) The book or user to start in when working with Analytics.

Field	Description
Default Look In Setting	(Optional) The book or user to start in when working with transactions.
<b>User Detail Information section</b>	
Alias	<p>Enter a short identifier for the user. For example, enter the user's preferred name or nickname.</p> <p>If you added users through the Quick Add page, all the characters before the @ sign in the email address become the alias.</p>
User ID	Unique system identifier for a user to sign in to the application.
Email	Complete email address for a user, such as isample@rightequip.com. Users must have a valid email address to be granted access to the application.
<b>User Geographic Information section</b>	
Language, Locale, Currency, Time Zone	Company defaults. Users can override this setting when they edit their personal preferences.
<b>User Security Information</b>	
External Identifier for Single Sign On	Read-only. For more information, see <a href="#">Setting Up Your Company Profile and Global Defaults</a> (on page 529)).
<b>Additional Information section</b>	
Theme Name	<p>Your company administrator sets up the default settings for your theme. You can override this default by clicking the Theme Name drop-down list and then selecting the desired theme.</p> <p><b>NOTE:</b> The default theme for new users is contemporary and the default theme for existing users is classic. Users can override this default in their Personal Profile. Your choice of theme has no effect on how the application behaves. Contact Customer Care if you want to suggest other themes.</p>
Show Welcome Page on Sign in	<p>To prevent the Welcome page from appearing each time you sign in to the application, clear this field.</p> <p><b>NOTE:</b> You can also clear the field from the Welcome page when you first sign in.</p>

Field	Description
Enable Sync of Team Contacts	Determines if you want the PIM Sync application to include the synchronizing of contacts that the user owns as well as all contacts the user has access to via Contact Teams. Selecting this option prevents duplicates from being created since each team member is synching back to the same contact record in Siebel CRM On Demand.
Fund Approval Limit	<b>For users of Siebel CRM On Demand High-Tech Edition:</b>  Enter the amount limit that this user can approve for each fund request when setting the status to Claim Approved. If the user tries to exceed this limit, an error message appears and the application prevents the fund request approval.
Enable Animation	Determines whether the display of notes in the Message Center and record Details pages is animated.
Authentication Type	Read-only. For more information, see <a href="#">Setting Up Your Company Profile and Global Defaults</a> (on page 529).
<b>Delegated Users section</b>	
Add, Edit or Remove Users	You can delegate users to view and update your information with the same rights that you have. For more information, see <a href="#">Adding Delegated Users</a> (on page 315).

## About User Page Layouts

You can define separate page layouts corresponding to different views of the user details in CRM On Demand.

The following user page layouts are available from the User Application Customization page:

- **User Page Layout.** Used for the User Detail page displayed when you drill down on a user name from a record, or from the Recently Viewed or Favorites lists. Everyone in the company can see this layout.
- **User Admin Page Layout.** Used for the User Detail page displayed from the User List page under User Management and Access Controls. Only company administrators can see this layout.
- **User Owner Page Layout.** Used for the Personal Details page in My Setup. Only the signed-in user and administrators can see this layout.

Users can control the layout of the related information that appears on the Detail pages based on the User Admin and User Owner page layouts, but they cannot do so for the Detail pages

based on the User page layout. Users do this by navigating to My Setup > Personal Layout > User Admin Layout, or My Setup > Personal Layout > Personal Profile Layout, as described in [Changing Your Detail Page Layout](#) (on page 317).

For the Detail pages based on the User page layout, there is no Edit Layout link as there is for the Details pages, based on the User Admin and User Owner page layouts.

The separate user page layouts are useful when you have User fields that contain private data. In this situation, you do not want the private fields to be visible when a user drills down on a user name from a record. You can therefore make the private fields available in the User Owner page layout and the User Admin page layout, but not the User page layout.

Page layouts are assigned to particular roles. Therefore, by assigning the appropriate page layouts to a role, you ensure that users with that role cannot see any private fields that they should not be able to see.

The separate user page layouts are also useful when you want to make fields read-only for a user. For example, fields containing quota information should not be editable by the user, rather only by management. In this case, you make the private fields available as read-only fields in the User Owner page layout for a particular role.

The following are examples of the type of field that can be useful to track as private fields for particular roles:

- Inside Sales Rep
  - Number of qualified leads that are not rejected
  - Number of leads contacted for each month
- Field Sales Rep
  - Quota (amount for each quarter)
  - Cost of converting lead to customer
- Marketing Manager
  - Campaign effectiveness (the amount spent compared with the amount of revenue)
- Regional Sales Manager
  - Number of lost customers for each quarter
  - Volume of revenue stream lost to regional competitors

For more information about creating page layouts, see [Customizing Static Page Layouts](#) (on page 570); for information about setting up roles, see [Adding Roles](#) (on page 608).

## User Detail Page

This topic describes what the company administrator can do from a User Detail page that you access from the User List page.

The form at the top of the User Detail page shows fields for a user record in read-only format. Under the form are sections where you can add quotas, review the sign-in history, or review the audit trail.



The following table describes what you can do from the User Detail page:

To do this	Follow these steps
Create a quota for this user	In the Quotas title bar, click New Quota. On the Edit Quota page, fill in the amounts, click Spread or Sum, and save the record. For more information, see <a href="#">Setting Up Users' Sales Quotas</a> (on page 617).
Create a user	In the User Detail title bar, click New User. On the User Edit page, enter the required information and save the record. For field descriptions, see <a href="#">User Fields</a> (on page 613).
Delete a quota	Click Del in the row of the record you want to delete.
Reset this user's password	In the User Detail title bar, click Reset Password. For more information, see <a href="#">Resetting a User's Password</a> (on page 619).
Review a user's PIM Sync usage	Scroll down to the Audit Trail section. To see additional records, click Show Full List.
Review a user's sign-in activity	Scroll down to the Sign-in History section. To see additional records, click Show Full List.
Update a quota	Click Edit in the row of the quota you want to update. On the Edit Quota page, update the information, click Spread or Sum, and save the record. For more information, see <a href="#">Setting Up Users' Sales Quotas</a> (on page 617).
Update a user record	In the User Detail title bar, click Edit. On the User Edit page, update the information and save the record. For field descriptions, see <a href="#">User Fields</a> (on page 613).

### Related Topic

User Fields 613

## Setting Up Users' Sales Quotas

If sales representatives use Siebel CRM On Demand to manage their forecasts, their quotas need to be set up. Sales representatives can set up their own quotas or, as an administrator, you can create quotas for them.

This section describes the procedure for the administrator to set up a user's quotas.

### *To set up a user's quota*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.

- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user whose quota you want to set up.
- 5 On the User Detail page, scroll down to the Quotas section and do one of the following:
  - Click the New Quota button.
  - Click the Edit link for the quota you want to edit.
- 6 On the Edit Quota page, complete the fields.
  - To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
  - To add the monthly quotas together, enter an amount for each month and click Sum.
- 7 Save the record.

## Changing a User's User ID

You can change the User ID for a user.

**Before you begin.** To perform this procedure, your role must include the Manage Users and Access privilege. To allow users to change their email address or user ID, you must set up the Sign In and Password Control feature. For instructions, see [Defining Your Company's Password Controls](#) (on page 538).

### *To change a user's User ID*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link of the user.
- 5 On the User Detail page, click Edit.
- 6 On the User Edit page, edit the User ID field.
- 7 Save the record.

- 8 On the title bar, click the Reset Password button. The user will receive two email messages:
  - one with a temporary password, valid for three days
  - one with a temporary URL where they can use the temporary password to sign in and create a new password.

## Resetting a User's Password

In Siebel CRM On Demand, users must provide answers to a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they get locked out and do not want to wait the lockout duration, you can reset their password.

**NOTE:** This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before emailing the temporary password.

**Before you begin.** To perform this procedure, your role must include the Manage Users and Access privilege.

### *To reset a user's password*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user whose password you want to reset.
- 5 On the User Detail page, on the title bar, click the Reset Password button.

This replaces the user's existing password with a new temporary password. The new temporary password is emailed to the user.

**NOTE:** This event is recorded in the Sign In History section on the User Detail page.

## Reviewing Sign-In Activity for a User

You can review the sign-in history for each user at your company.

**Before you begin.** To perform this procedure, your role must include the Manage Users and Access Controls privilege.

### *To review the sign-in history at your company*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user whose sign-in activity you want to view.
- 5 To review the user's sign-in activity, scroll down to the Sign-in History section.

## Deactivating Users

You cannot delete a user. Instead, you need to make the user inactive. You do not need licenses for inactive users.

**Before you begin.** To perform this procedure, your role must include the Administer Users, Groups and Roles privilege.

### *To deactivate a user*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, click the User Management link.
- 4 On the User List page, click the Last Name link for the user you want to remove from the system.
- 5 On the User Detail page, click the Edit button.
- 6 On the User Edit page, in the Key User Information section, select Inactive in the Status field.
- 7 Save the record.

## Setting Up Groups

### Before you begin:

- To perform this procedure, your role must include the Manage Users and Access privilege.
- To understand how groups work, read the information provided in [About Groups](#) (on page 604).

**CAUTION:** Before you set up or change a group, you must select the Default Group Assignment option in the Company Profile page, even if you do not plan to use the default group assignment functionality. If you do not select this option before you set up or change a group, the group will not perform correctly. If that happens, you must delete the group, select the Default Group Assignment option in the Company Profile page, and then create the group again.

If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, deselect the Default Group Assignment option when you have finished creating the groups, and adding members to the groups. If you later decide to make changes to the groups or group membership, select the Default Group Assignment option again before you make the changes, and deselect it when you have finished making your changes.

### Sequence for Setting Up Groups and Importing Users

If you are using groups to apply record sharing, follow this sequence:

- 1 Turn on the Default Group Assignment feature.
- 2 Create groups and assign users to the groups.
- 3 Import your records with the default Owner (user), which will propagate groups to the records.

### *To turn on the default group assignment option*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Company Administration link.
- 3 Click the Company Profile link.
- 4 On the Company Profile page, click Edit.
- 5 In the Company Settings section, select the Default Group Assignment check box.
- 6 Save the settings.

### *To set up a group*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 On the User Management and Access Controls page, in the User and Group Management section, click the Public Sharing Groups link.
- 4 On the Group List page, click New Group.
- 5 On the Group Edit page, complete the required fields.

Field	Description
Name	Limit of 50 characters. Required field by default.
Description	Limit of 255 characters.

**NOTE:** You can rename the group without affecting existing records, since the application uses the underlying group ID to track group records, not the group name. However, your group name needs to be unique within your company.

- 6 Click Save.
- 7 On the Group Detail page, click Add Members.
- 8 On the Group Members page, click the Lookup icons and add users.  
Only users who have not been assigned to a group appear on the list. To determine which group a user belongs to, you need to go to that user's Detail page.
- 9 Save the record.

### **About Changing the Default Group Assignment Setting**

If your company decides to no longer use groups, you should follow this sequence before turning off the Default Group Assignment feature:

- 1 Delete all users except for the one you want to be the Primary Owner of the group's records.
- 2 Delete the group.
- 3 Deselect the Default Group Assignment check box on the company profile.

## Related Information

See the following topics for related information about groups and sharing calendars:

[About Groups](#) (on page 604)

[Viewing Others' Calendars](#) (on page 99)

[Adding Custom Calendar Views](#) (on page 101)

## Setting Up Territories

You can set up territories used at your company, including territory hierarchies. For example, a company might organize its sales force into groups, or territories, based on geography, products, or industries. Then, each sales group is responsible for handling the accounts and sales opportunities in its territory. You can use the territories that you set up in Siebel CRM On Demand as the basis for assigning new account and opportunity records.

**Before you begin.** If your territories have not been defined at your company, determine the naming convention and hierarchy before setting up the information in Siebel CRM On Demand. When entering the information, start from the top level and then add the subterritories. To perform the procedures described in this section, your role must include the Administer Territories privilege.

### *To set up your territory hierarchy*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Territory Management link.
- 3 On the Territory Hierarchy page, do one of the following:
  - To add a territory, click New Territory.
  - To update territory information, click the appropriate link in the Territory Name column, and then, on the Territory Detail page, click Edit.
- 4 On the Territory Edit page, enter the required information.

Field	Description
Territory Name	Limit of 50 characters.
Parent Territory	If this is a top-level territory, leave this blank.
Current Quota	You can enter a quota assigned to this territory.
Territory Currency	Inherits your company's default currency.

- 5 Save the record.
- 6 (Optional) On the Territory Detail page, click New in the Child Territories title bar to add subterritories.

### *To update the parent territory*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Territory Management link.
- 3 On the Territory Hierarchy page, select the child territory.
- 4 On the Territory Detail page, click Edit.
- 5 On the Territory Edit page, click the Lookup icon next to the Parent Territory field.
- 6 In the Search window, select the parent account.
- 7 Save the record.

### *To update records with territory*

There are several ways to update the territory field on a record. Typically, this is an automated process:

- **Assignment Manager:** You can use Assignment Manager to populate this field and the related owner and team members for the record.
- **Import:** When you want to update territory ownership on many records, set the reassign owner flag to trigger the assignment of records using Assignment Manager.
- **Manual:** A user can assign their territory to a record.

## About Books

A book provides a way of segmenting data according to the organizational units of your business, such as territories or products. You can create book hierarchies based on how you want to organize your information, and then set up users to have the appropriate level of access to books. When you use this method to organize your data, users can easily find the data that matters most to them, even in large data sets. You can use the Look In selector to drill down to a specific segment, to find the right data.

**NOTE:** Your company administrator must enable books when your company is set up for Siebel CRM On Demand. Books are not a standard feature, but may be enabled at your company's discretion.



## Advantages of Using Books

Users should spend the majority of their time in their default book, which contains the data most relevant to them. If a user has access to a large data set, using books improves the performance of navigation. When a user has access to large data sets, their ability to work effectively diminishes if they cannot easily segment or find relevant data. Without books, the data set accessible to a user may contain too many records to be meaningful. You can structure books to provide the best segmentation of data for each user.

**NOTE:** For additional information provided by the Training and Support Center in Siebel CRM On Demand, click the Training and Support global link.

When you associate information, such as accounts or service requests, with one or more books, the users associated with those books automatically get the appropriate level of access to the information. There are 3 ways to associate books with records:

- One record at a time. See [Assigning Records to Books](#) (on page 630).
- In bulk, by batch assignment. See [Assigning Records to Books](#) (on page 630).
- Based on rules and conditions, by using workflow. See [About Workflow Rules](#) (on page 655).

**NOTE:** Book hierarchies are separate entities from User hierarchies. They do not affect the existing functionality of User hierarchies.

The following table summarizes the main areas where books are used in CRM On Demand.

Area	Sub-area	Description
Company Administration	Company Profile	To use the book functionality, a company must be Book Enabled. See <a href="#">Setting Up Books</a> (on page 626).
User Management and Access Controls	Book Management	Creates books and subbooks, and associates users with books. See <a href="#">Setting Up Books</a> (on page 626).
	Access Profile	Determines users' access rights to the current book and any subbooks. You select from the list of profiles that are enabled for books.  For more information on access rights, see <a href="#">Setting Up Access Profiles</a> (on page 606).
	Role Management	Provides access to Book records. Assign the Manage Books privilege. See <a href="#">Adding Roles</a> (on page 608).
	User Management	Defines a user's default Look In setting to filter records by book, user or delegate.

Area	Sub-area	Description
Any record type supported by books	Create new list	<p>Specifies the Search In setting, to filter records by book, user or delegate.</p> <p><b>NOTE:</b> The following record types are supported by books:</p> <ul style="list-style-type: none"> <li>■ Account</li> <li>■ Contact</li> <li>■ Opportunity</li> <li>■ Lead</li> <li>■ Service Request</li> <li>■ Activity</li> <li>■ Dealer</li> <li>■ Portfolio</li> <li>■ Household</li> <li>■ Custom Objects 1</li> <li>■ Custom Objects 2</li> <li>■ Custom Objects 3</li> </ul>
Data Management Tools	Batch Assign Book Queue	Batch Assign Leads, Accounts, Contacts, Opportunities, and Service Requests to a specified book. You can add, replace or remove books.
Workflow Rules	Administer Workflow Rules	Configures the system to perform work actions automatically. For example, you can create a rule to assign a record to a specified book when the record is saved. See <a href="#">Creating Workflow Rules</a> (on page 661).
Application Customization	Rename Record Types	Renames the Book record type.

## Setting Up Books

You can set up books to use at your company, including book hierarchies. You can then manage book access, assign data to books, and define book-related workflows. To perform the procedures described in this section, your role must include the Manage Books privilege.

**Before you begin.** If your books have not been defined at your company, determine the naming convention and hierarchy before setting up the information in Siebel CRM On Demand. When entering the information, start with the top level, and then add the subbooks.

Any book can contain data, but for best performance, do the following:

- Limit the record count to a maximum of 20,000 to 30,000.
- Do not add a record to multiple books within a single hierarchy.

## About Book Structure

A book contains three sections of information:

- The book details, which are used to set up the hierarchy.
- The subbooks, which define the lower levels in the hierarchy.
- The book users, who can see this level of the hierarchy, and anything below.

### *To set up your book hierarchy*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Book Management link.
- 3 On the Book Hierarchy page, do one of the following:
  - To add a book, click New.
  - To update book information, click the Edit link to the left of the Book Name.
- 4 On the Book Edit page, enter the required information.

Field	Description
Book Name	For visibility in the Look In selector, the recommended limit is 60 characters.
Book Type	Choose from the types defined by your administrator.
Parent Book	If this is a top-level book, leave this field blank.
Can Contain Data	<p>Applies only to the current book, not to any subbooks. Select this check box if you want to associate records with the book. For performance reasons, books that do not need to contain data must not have this check box selected.</p> <p><b>NOTE:</b> In the Look In selector that appears throughout the application, books that can contain data are identified by a blue document icon. Books that cannot contain data are identified by a yellow folder icon.</p>

- 5 Save the record.
- 6 (Optional) On the Book Details page, click New in the Sub-Books title bar to add subbooks.

*To update the parent book*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Book Management link.
- 3 On the Book Hierarchy page, select the subbook.
- 4 On the Book Details page, click Edit.
- 5 On the Book Edit page, click the Lookup icon next to the Parent Book field.
- 6 In the Search window, select the parent book.  
When you change the parent of a book:
  - The new parent applies to the current book and any subbooks that are below the current book
  - Any users assigned to the old parent book lose access to the current book and its subbooks
  - Any users assigned to the new parent book gain access to the current book and its subbooks
  - Any users assigned directly to the current book are unaffected by the change in parent
- 7 Save the record.

**NOTE:** If you want to delete a parent book, you must first remove all its sub-books, users and data.

## Associating Users with Books

You can define which users can access a book. There are two methods of doing this.

**NOTE:** To perform these procedures, your role must include the Manage Books privilege.

*To associate users with books (Method 1)*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the Book Management link.
- 3 On the Book Hierarchy page, click the Book Name with which you want to associate users.
- 4 On the Book Details page, on the title bar of the Book Users section, click Add Users.

- 5 In the Book Users Edit page, pick the users that you want to associate with the book.

Field	Description
Users	<b>NOTE:</b> A user's delegates do not automatically get access to a user's book. You must also associate each delegate with the book.
Book Role	Choose from the roles defined within your company. <b>NOTE:</b> This is not a CRM On Demand role.
Access Profile	Determines the user's access rights to the current book and any subbooks. Select from the list of profiles that are enabled for books. For more information, see <a href="#">Setting Up Access Profiles</a> (on page 606).

### *To associate users with books (Method 2)*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the User Management and Access Controls section, click the User Management and Access Controls link.
- 3 In the User and Group Management section, click the User Management link.
- 4 In the User List, click the last name of the user you want to associate with books.
- 5 On the User Detail page, on the title bar of the Assigned Books section, click Add Books.
- 6 On the Assigned Books Edit page, pick the books that you want to associate with the user.

Field	Description
Book Name	Click the icon to the right of the Book Name field, pick a book in the Look In selector, and click OK.
Book Role	Choose from the roles defined within your company. <b>NOTE:</b> This role is not a CRM On Demand role.
Access Profile	Determines the user's access rights to the current book and any subbooks. Select from the list of profiles that are enabled for books. For more information, see <a href="#">Setting Up Access Profiles</a> (on page 606).

## Enabling Books for your Company

When the book hierarchy for your company has been defined, you can enable books for your company.

### *To enable books for your company*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Company Administration section, click the Company Administration link.
- 3 In the Company Profile section, click the Company Profile link.
- 4 On the Company Profile page, set the following options. For more information about these options, see [Setting Up Your Company Profile and Global Defaults](#) (on page 529).
  - a In the Analytics Visibility Setting section, set the Historical Subject Areas option to Full Visibility.
  - b In the Company Data Visibility Settings section, ensure that the following check boxes are selected:

Setting	Purpose
Book Enabled	Enables book functionality  <b>CAUTION:</b> Do not select the Book Enabled option until you have created your book hierarchy. You cannot deselect this option after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.
Display Look In Selector	Enables the Look In selector that you can use to filter records by user, delegate, or book

**NOTE:** To be able to use books, a user must have access to the Book record type in the assigned role. In addition, the Historical Subject Areas option on the user's personal details must be set to Full Visibility.

## Assigning Records to Books

**Before you begin.** To assign records to books, your role must include the Manage Books privilege.

Records such as Accounts, Contacts, Leads, Opportunities and Service Requests can be assigned to books. There are two ways to assign records to books:

- Individually by using the Detail page for the record
- By batch assignment

Both methods are described in this topic.

***To assign a single record to a book***

- 1 Navigate to the Detail page for the record.
- 2 On the title bar of the Books section of the Detail page, click Add.
- 3 In the book selector, choose the book to which you want to assign the record, and click OK.

***To batch assign records to books***

- 1 In the list window, click the Menu button on the title bar, then click Batch Assign Book.
- 2 In the Batch Assign Book window, click the selector button beside the Target Book box then, in the Book lookup, choose the book to which you want to assign records.
- 3 Choose an Assignment Option for the records in the list.

Option	Description
Add	Adds the Target Book to all records. This assignment does not affect any previous book assignment for the records.
Replace Type	Adds the Target Book to all records and removes any previously assigned books that have the same type as the Target Book.  <b>NOTE: Book Types are defined by your company administrator.</b>
Replace All	Adds the Target Book to all records and removes all previously assigned books, regardless of type.
Replace Book	Specifies the book that you want to replace.  Reassigns records from the book you specify here to the Target Book. Other records are not affected.
Remove	Removes the existing assignment to the Target Book from all records.
Remove All	Removes all assigned books from the records.

- 4 If you choose any option other than Add in step 3, you must now choose an Apply To option.

Option	Description
Manual Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made manually

Option	Description
Automatic Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made by workflow or batch
Both	Applies the Assignment Option to all selected records

- 5 To apply your chosen assignment criteria, click Assign.

The Batch Assign Book Queue window opens, showing your assignment request in the Active Requests section. For more information, see [Batch Assign Book Queue Page](#) (on page 763).

When your request has been processed, you will be notified by email.

## Business Process Management

Click a topic to see step-by-step instructions to do the following:

- [Setting Up Assignment Rules](#) (on page 636)
- [Mapping Additional Fields During Lead Conversion](#) (on page 642)
- [Setting Up Forecast Generation](#) (on page 643)
- [Setting Up Sales Processes, Categories, and Coaches](#) (on page 647)
- [Customizing Your Company's Industry List](#) (on page 655)
- [Creating Workflow Rules](#) (on page 661)
- [Creating Workflow Rule Actions](#) (on page 663)
- [Changing the Order of Workflow Rule Actions](#) (on page 667)

### Related Topics

About Assignment Rules	632
About Workflow Rules	655

## About Assignment Rules

**Before you begin.** To set up the assignment rules, your role must include the Data Rules and Assignment privilege.

Assignment rules allow you to automatically assign a lead, an opportunity, a service request, or an account to the appropriate person, team, and territory, based on the rules (called rule groups) that you set up.



If your company has selected the group assignment option, all group members share the records you assign to a member of that group. For more information, see [About Groups](#) (on page 604).

Depending on your company's structure and business processes, assignment rules can be simple. For example:

- Sales leads for each geographic region are assigned to the regional sales manager.
- New service requests are assigned to the technical service manager.

Or, the rules can be more complex. For example:

- Most leads are assigned by product expertise and geographic location, but some are assigned to a telemarketing manager.
- Most service requests are assigned by problem area, but all requests involving a particular product are routed to one person.

The following table describes how you can assign record types:

This record type	Has these assignment options
Accounts	You can assign the records to an employee or territory. Additionally, you can specify teams that share ownership of the newly assigned accounts.
Leads	You can assign the records to an employee.
Opportunities	You can assign the records to an employee or a territory. Additionally, you can specify teams that share ownership of the newly assigned opportunities.
Service Requests	You can assign the records to an employee.

The assignment rules in the active rule group are evaluated when the following occurs in relation to a record type:

- For leads: The Reassign Lead Owner check box is selected.
- For service requests:
  - The service request is created without an owner or the owner is deleted from the record (that is, the Owner field is blank).
  - The Reassign Owner check box is selected.
- For accounts: The Reassign Owner check box is selected.
- For opportunities: The Reassign Owner check box is selected.

**NOTE:** When a lead or service request is assigned an owner, an email is sent to the new owner. You can turn off email notification for Service Requests on a per-rule basis by deselecting the Send Email Notification check box (flag) on the Service Request Assignment Rule Edit page. To do this, click the Admin global link, click Data Rules and Assignment, and then click Service Request Assignment Rules. Click the link for the rule group and then click the Edit link for the rule.

## Tracking the Reassignment Process

You can use three fields to help you to track the owner reassignment process, or to run analyses to determine how long the reassignment process takes. You can add these fields to Account, Opportunity, Lead, and Service Request page layouts. The fields are:

- **Assignment Status**

The status can be Queued (the record is in the queue to be processed by assignment manager), or Processing (the record is currently being processed by assignment manager), or blank (the record is neither in the queue or being processed).

- **Last Assignment Submission Date**

If the record is queued for processing or is currently being processed by assignment manager, this field shows the date and time the record was saved with the Reassign Owner check box selected. However, in the case of a service request record, this field shows the date and time the record was saved with the Owner field blank.

- **Last Assignment Completion Date**

If a record has never been reassigned, this field is blank; otherwise, the field shows the date and time the record was last reassigned.

For more information on adding fields to page layouts, see [Customizing Static Page Layouts](#) (on page 570).

## Making Rule Groups Active

You can create multiple assignment rule groups, but only one rule group can be active at a time for each record type.

**CAUTION:** The rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you create a new rule group, and mark it active, do not delete the previously active rule group until after the rules have been released.

**TIP:** Rule groups can serve as historical reference for the leads. Instead of deleting rule groups, you can mark them as inactive.

## About Group Assignment

If your company assigns records to entire groups instead of one employee, your company administrator must:

- 1 Select the Default Group Assignment field in the Company Profile page (see [Setting Up Your Company Profile and Global Defaults](#) (on page 529)).
- 2 Set up the groups before activating the assignment rules (see [Setting Up Groups](#) (on page 621)).

- 3 Select one member in the group to be the owner for accounts or opportunities during the assignment procedure.

When the record is assigned to an owner in the group:

- The Owner field shows the owner's information.
- The Primary Group field shows the group name that the owner belongs to on the record Edit and Detail pages, if the company administrator added the field to the layout.
- The record appears in the areas of the applications that normally display that employee's records, such as Homepages and record lists.

Generally, all members in the group have full access to the record, although access levels can be adjusted to restrict a user's access.

## Scenario for Assigning Leads

The following is an example of a typical company's business rules for assigning leads. To set up the rules that automatically assign this company's leads, the administrator does the following:

- 1 States the company's business rules for assigning leads to people.

For example, for accounts in the U.S., many sales territories are assigned by state, but in certain states, the product expertise determines the territory assignments. In addition, Corporation XYZ account is always assigned to one particular sales manager regardless of the lead's state or product interest.
- 2 Lists all of the assignment scenarios that are necessary to cover the business rules:
  - **Account (company) is Corporation XYZ.** Assign to Sales Manager A.
  - **Primary Address - State is CA, NV, OR, WA.** Assign to Sales Manager B.
  - **Primary Address - State is OH, IN, MI, NY, KY.** Assign to Sales Manager C.
  - **Lead is interested in the ABC Product (in all states except those listed already, and not for Corporation XYZ).** Assign to Sales Manager D.
  - **Primary Address - State is not listed.** Assign to Sales Manager E.
- 3 Puts the scenarios in the order in which they are to be considered.

First, examine the Account field. If the value is Corporation XYZ, assign the lead to Sales Manager A, regardless of any other conditions. If this criterion is not matched, examine the Primary Address State field. If the value is CA, NV, OR, or WA, assign the lead to Sales Manager B, and so on.

As a best practice, use the Record Assignment Template to help you plan your company's assignment scenarios, and to set up rules that give you the results you want.

## Criteria Conditions in Assignment Rules

You can use the following conditions in the criteria on assignment rules:

- **Between.** Matches the rule to records where the value in the criterion field is between two values defined on the rule criterion. (The results do not include records where the value in the criterion field is equal to one of the values on the rule.) Use a comma to separate the values. Do not use a dash (-) to specify a value range or to separate values.

Use the Between condition for date fields only. Use the MM/DD/YYYY date format.

- **Contains all values.** Matches the rule to records where the criterion field contains the criterion value on the rule. For example, the criterion value, *qual*, matches the rule to records where the criterion field contains a value, such as *qualifying* or *qualified*.

You cannot use the Contains all values condition for date fields or number fields.

- **Contains exact field value.** Matches the rule to records where the criterion field contains all of the string in the criterion field value, and no additional characters. For example, the criterion value *Closed* matches the rule to records where the criterion field value is *Closed*, but not *Closed/won*.

You cannot use the Contains exact field value condition for date fields or number fields.

- **Contains none of the values.** Matches the rule to records where the criterion field contains any values that are not equal to the rule criterion value.

You cannot use the Contains none of the values condition for date fields or number fields.

- **Less than or equal to.** Matches the rule to records where the value in the criterion field is less than or equal to the rule criterion value.

You can use the Less than or equal to condition for number fields and currency fields only.

- **Greater than or equal to.** Matches the rule to records where the value in the criterion field is greater than or equal to the rule criterion value.

You can use the Greater than or equal to condition for number fields and currency fields only.

For step-by-step instructions on how to set up assignment rules, see [Setting Up Assignment Rules](#) (on page 636).

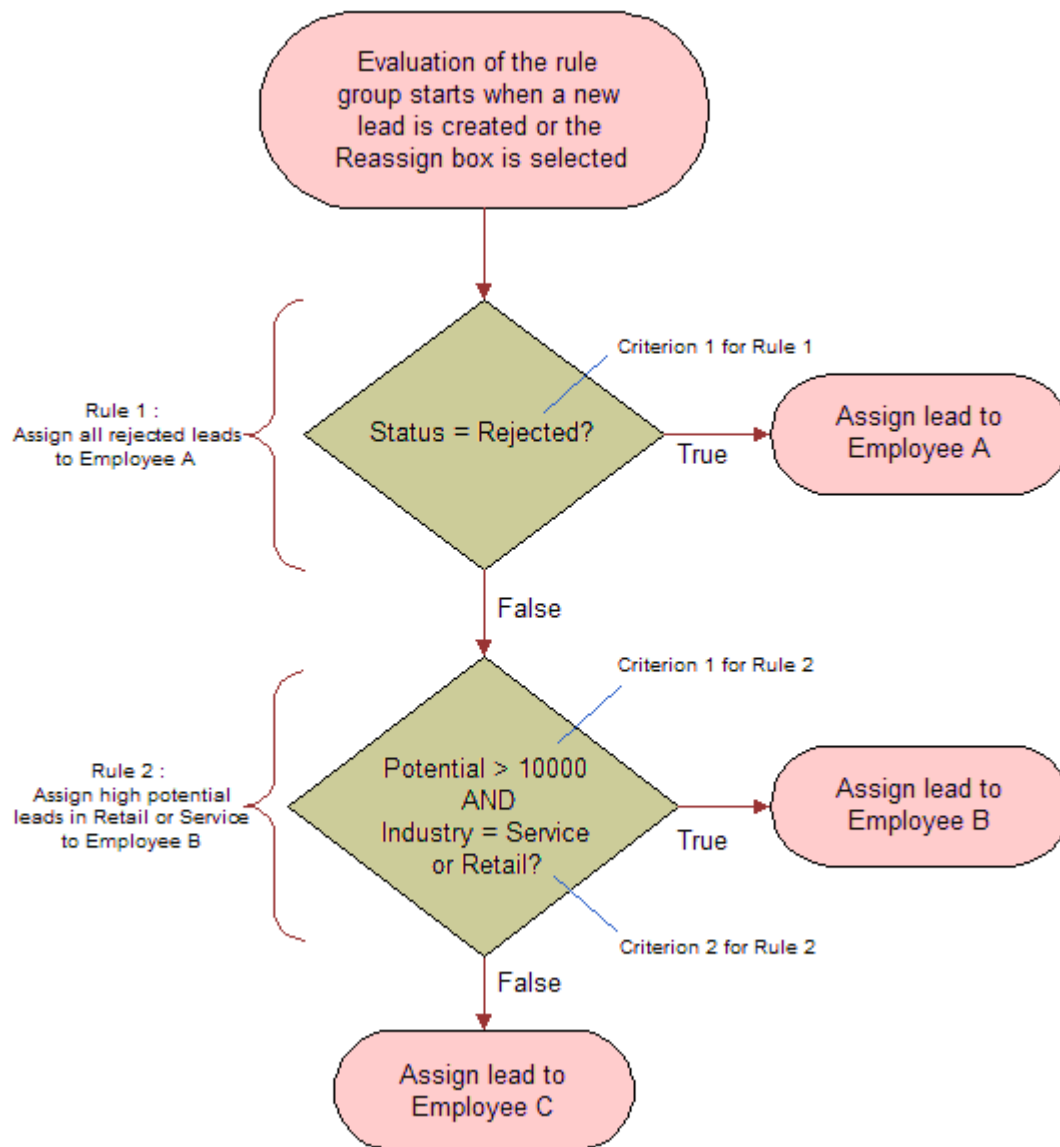
## Setting Up Assignment Rules

### Before you begin:

- To set up the assignment rules, your role must include the Data Rules and Assignment privilege.
- For information about designing your assignment rules, see [About Assignment Rules](#) (on page 632).

## Assignment Rule Group Example

Rule groups are made up of rules, which, in turn, are made up of criteria. The components of a rule group are illustrated in Figure 1.



**Figure 1: How a Lead Assignment Rule Group Is Evaluated**

**NOTE:** For correct behavior of the Reject button on the Lead Detail page, the first rule in the rule group must assign rejected leads.

### *To set up assignment rules*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Assignment Rules section, click the link for the appropriate record type.  
A list of all of the rule groups that have been defined for your company to date appears.

- 4 Create a new rule group:

- a Click the New Rule Group button.
- b On the New/Edit page, fill in the fields.

Field	Description
Rule Group Name	A unique name, up to 30 characters.
Active Rule Group	Only one rule group can be active at a time. If you specify a new rule group as active, the previously-activated rule group becomes inactive.
Unassigned Owner	An employee who inherits the records that aren't assigned by one of the rules. <b>Example:</b> Employee C in Figure 1.
Return E-mail Address for Lead or Service Requests Assignment Notification	The email address that appears in the From field on the assignment email notifications sent to lead and service request owners. <b>NOTE:</b> No email notifications are sent for account and opportunity records.
Unassigned Account or Opportunity Territory	A territory that inherits the records that aren't assigned by one of the rules.

- c Save the record.  
This saves the name of the new rule group in preparation for adding rules to the rule group.

- 5 Add a rule to the rule group:
  - a In the Rules title bar on the Rule Group Detail page, click New.

- b** On the New/Edit page, fill in the fields.

The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Rule Name	A unique name.	Assign high potential leads in Retail or Service
Order	The order in which the rules are evaluated. When the criteria on one rule are met, the record is assigned and subsequent rules are ignored.	1
Assign To Owner	If the rule criteria are met, the record is assigned to this user.  For group assignment of accounts and opportunities, the user must be a member of the group sharing the records.	Employee B
Assign To Territory	If the rule criteria are met, the record is assigned to this territory.	North Eastern Region
Include Related Contacts	If the rule criteria are met, the contacts linked to the account are assigned to the specified account owner and territory.	
Include Related Opportunities	If the rule criteria are met, the opportunities linked to the account are assigned to the specified account owner and territory.	
Include Team Assignment	If the rule criteria are met, the team members are assigned to the account.	

- c** Save the record.

This saves the rule so you are now ready to add criteria to the rule.

- 6** (Optional) For accounts and opportunities, update the access for linked records and users:

- a** On the Rule Detail page, click Add Users or Edit Users in the Team Assignment title bar.
- b** Click the Lookup icon and select the users.
- c** Assign the access level for accounts, contacts, and opportunities.

**7** Add a rule criterion to the rule:

- a** In the Rule Criteria title bar on the Rule Detail page, click New.
- b** On the New/Edit page, fill in the fields.

The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Field	Name of the field to be evaluated.  <b>NOTE:</b> If a field has been relabeled, the new field name appears.	Potential Revenue
Condition	The following conditions cannot be used for date fields or number fields: Contains all values, Contains exact field value, and Contains none of the values.  The following conditions can be used for number fields and currency fields only: Greater than or equal to, Less than or equal to.  The Between operator can be used for date fields only.	Greater than or equal to
Value(s)	Use commas to separate values. If the value you want to match includes a comma, such as an address, enclose the value in quotation marks.  If the condition is Between, enter the minimum and maximum values separated by commas.	10000

- c** Do one of the following:
  - If you want to add more criteria to the rule, click Save and New Rule Criteria and go back to Step b. If you have multiple criteria defined for a rule, the record must match *all of the criteria* in order for the rule to be matched.
  - If you have entered all criteria for the rule, click Save.

**8** In the Rule title bar on the Rule Detail page, click Return to Rule Group Detail.

**9** On the Rule Group Detail page, do one of the following:

- If you want to add more rules to the rule group, go back to Step 5.
- If you have entered all the rules for the rule group, click Return to Rule Group List to finish.

**TIP:** Rules are executed in the order they appear in the Rule Group, so make sure they appear in the correct sequence. After one rule is met, subsequent rules are ignored.



***To edit, activate, or inactivate a rule group***

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Assignment Rules section, click the link for the type of assignment rules that you want to edit.

A list of all the rule groups of that type that have been defined for your company to date appears.

- 4 Click the Rule Group link that you want to update.
- 5 On the Rule Group Detail page, click Edit.
- 6 Update the fields, and save the record.

The changes that you make take effect at midnight Siebel Server time (default), or whenever your assignment rule groups have been set to update.

**CAUTION:** When you mark a rule group *active*, the rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you mark a rule group *active*, do not delete the previously active rule group until after the rules have been released.

***To edit assignment rules***

- 1 On the Rule Group Detail page, click the Edit link of the rule that you want to change.
- 2 Update the fields.

**NOTE:** You can change the order in which rules are evaluated by editing the Order field. On the rule that you want to change, enter an order number that is higher than the order number of the rule that is to precede the rule you are changing, and lower than the order number of the rule that is to follow it.

For example, if there are three rules, ordered 1 through 3, and you want to change the order so that the rule that is currently number 1 is evaluated after the rule that is currently number 2, change the order of rule number 1 to a value, such as 2.1 (or any value greater than 2 and less than 3).

- 3 Save the record.

## Mapping Additional Fields During Lead Conversion

**Before you begin.** To perform the procedures described in this section, your role must include the Data Rules and Assignment privilege.

Employees at your company can leverage lead records by converting the lead record to an account, contact, or opportunity record. During the lead conversion, some values are carried over to the new records by default. However, you can extend the amount of information that is carried over by mapping additional fields, including custom fields.

When users convert a lead record, they can do one of the following:

- Create new account, contact, and opportunity records, which are automatically linked to the lead record  
**NOTE:** The fields in the new records are filled in with the values in the lead record.
- Link the lead record to existing account, contact, and opportunity records that they select when converting the lead  
**NOTE:** With existing records, fields that already have values remain unchanged. Fields that are blank are updated with the mapped lead field value.

### About Customized Picklist Fields and Values

You can map picklist fields from the lead record to text fields (long or short) on account, contact, and opportunity records, or to a picklist field with identical values.

#### *To map additional fields when converting a lead record*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Assignment Rules section, click the Lead Conversion Mapping link.
- 4 On the Lead Conversion Mapping page, select the fields to map.
- 5 To revert the mapping back to the default settings, click the Default button in the title bar.
- 6 Click Save.

## Setting Up Forecast Generation

Sales employees and their managers need to regularly measure how they are progressing against quarterly sales goals. Forecasts in Siebel CRM On Demand automate the generation of sales forecasts; when a forecast is generated, the system alerts employees that the forecast has been created and is ready for review.

Every forecast is a snapshot of information about revenue and potential revenue for the quarter. Forecasts enable sales professionals and managers to track their quarterly sales performance against planned quotas, actual closed revenue, and expected revenue, given the current status of their sales opportunities.

Your company can base its forecasts on either opportunities or products, but not both. There are four types of forecasts: Opportunity Revenue, Product Revenue, Account Revenue, and Contact Revenue. When you select the forecast settings for your company, you determine which of these four types your entire company will use.

### ■ Opportunity revenue forecast

This type of forecast reports on the revenue listed in the opportunity records. The forecast numbers are calculated from the Revenue and Expected Revenue fields on all opportunity records that have the Forecast check box selected, and have a close date within the current quarter.

Set up this type of forecast if you want to forecast total opportunity revenue, regardless of how much revenue comes from individual products.

### ■ Product, account, and contact revenue forecasts

These types of forecasts report on the revenue listed on products linked to opportunity, account, or contact records. The forecast numbers are calculated from the Revenue and Expected Revenue fields on all products that have the Forecast check box selected, and have revenue that is scheduled to be recognized in the current quarter. The revenue for a product can be reported at one time, or it can be set up to recur over time.

Set up a product, account, or contact revenue forecast if your company wants to forecast one-time or recurring product revenue.

Each forecast type requires sales employees to take different actions. Make sure to tell your sales employees which type of forecast you set up before they begin creating opportunity, account, and contact records.

- Opportunity revenue forecasts require sales representatives to fill in opportunity revenue fields and indicate which opportunities they want to include in their forecasts; any linked products are ignored.
- Product revenue forecasts require sales representatives to link products to their opportunity records. Account revenue and Contact revenue forecasts require them to link products to their account or contact records. In all three cases, sales representatives must fill in the product revenue fields, and indicate which products they want to add to their forecasts.

According to the settings you define, forecasts are generated automatically on either a weekly or monthly basis. Each generated forecast is saved to the archive, providing a historical record for reference and analysis.

After the system generates a forecast, an alert appears on the My Homepage for each participant for two days. To extend the period the alert appears, update the Expiration Date field for that alert. For instructions, see [Publishing Company-Wide Alerts](#) (on page 544).

To be included in the forecast, an opportunity must:

- Have a close date in this quarter
- Be owned by a forecast participant

Participants in forecast generation are chosen by role. Your company's reporting structure, and the roles you choose for the forecast participants, must be set up so that the forecasts of the participants roll up to *one* top-level user. Typically this top-level user is a company vice-president or CEO.

- Have the Forecast check box on the opportunity record selected

To be included in the forecast, a product must have the Forecast check box on the product record selected

Some additional conditions must be met for a record's values to contribute to your company's forecast revenue. For detailed information, see [About Opportunities and Forecasts](#) (on page 173).

You can configure forecasts to display revenue projections for up to four quarters. With the extended forecast capability, you can view a forecast for the current quarter, and for the following one, two, or three quarters.

By default, all the existing forecast definitions are set to one quarter (only the current quarter is included in the forecast). When you change the duration setting to include multiple quarters, the forecast includes the current quarter as well as future quarters. For example, if you select a two-quarter forecast duration, the forecast includes the current quarter and the next quarter.

### **Before you begin:**

- The users that you intend to include in your company's forecasts must be set up correctly. Their user records must have:
  - A valid value in the Role field
  - A valid value in the Reports To field
  - The Status set to Active

If any of the users included in the forecast is not set up correctly, the entire forecast fails.

- The method you choose for forecasting must be publicized so that your employees fill in the needed information on the correct pages. You can also customize your fields to ensure your employees enter the information by making some fields read-only or required. For example, if your company calculates its forecasts on products instead of opportunities, make the Forecast check box on the Opportunity Edit page uneditable. This indicates to the users that they need to indicate which records are included in forecast on the Product Revenue page.

***To set up or update forecast generation***

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.
- 3** Click the Forecast Definition link.
- 4** On the Forecast Definition page, click Update.
- 5** In Step 1:
  - a** Select the Forecast Type.

Your company can forecast revenue based on opportunity, account, contact, or product revenue.
  - b** Specify when to Create the Forecast Snapshot.

Set the forecast frequency to create weekly or monthly forecasts.
  - c** Set the Forecast Duration.
- 6** In Step 2, select the Forecast Snapshot Day.

The forecast is generated at the start of the selected day (that is, at one minute past midnight) in the time zone of the hosting facility. Forecasts cannot be generated on the 29th, 30th, or the 31st of the month.
- 7** In Step 3, add the roles for those who are to participate in the forecast to the Forecasting Roles area.

Using the directional arrows, move Company Roles to the Forecast Roles list.
- 8** Click Finish.
- 9** (Optional) Review the list of participants in the forecast on the Forecast Definition page.

If the forecast fails to generate because of a problem with the reporting structure, the Primary Contact administrator (indicated on the Company Profile) receives an email notification. After the reporting structure has been corrected and the forecast has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

**NOTE:** After you have initially set up your forecast generation, two actions will always require you to update your forecast settings: adding or removing employees from the roles included in the forecast, and changing the name in the Reports To field on a participant's User Details page to someone not included in your forecast.

When you add or remove employees from roles, click the Update button on the Forecast Definition page, and then click through the three-step setup wizard to update the forecast. This refreshes your list of forecast participants.

When you change the name in a participant's Reports To field, make sure that the role that includes the new manager is selected for the forecast. The forecast participant

hierarchy must include managers for everyone except the person at the top level. If the role assigned to the new manager is not one that you included when setting up the forecast, simply add it in Step 3 of the setup wizard.

Click Finish to complete the update. You will then see a page that lists the forecast participants, which will include the updates that you made.

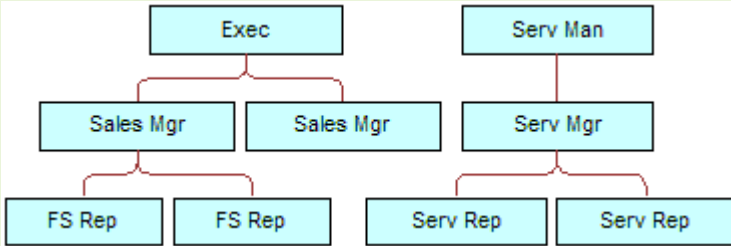
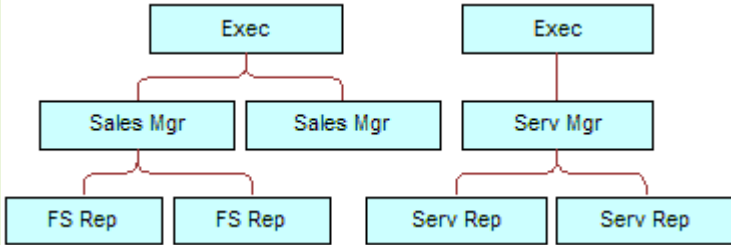
## Examples of Reporting Structures and Roles for Forecasting

The correct setup of your company's reporting structure is critical for forecast generation. All forecast participants, except for one top-level user, must report to another forecast participant, so that all individual forecasts roll up to one company-wide forecast.

Also, if any user with participants beneath him on the hierarchy has a status of Inactive, the forecast fails.

The following table shows reporting structure and participant role combinations that work and don't work for forecast generation.

For This Reporting Structure	Forecasting Works/Fails	Because
<pre> graph TD     Exec1[Exec] --&gt; Exec2[Exec]     Exec1 --&gt; Exec3[Exec]     Exec2 --&gt; SalesMgr1[Sales Mgr]     Exec2 --&gt; SalesMgr2[Sales Mgr]     Exec3 --&gt; ServMgr[Serv Mgr]     SalesMgr1 --&gt; FSRep1[FS Rep]     SalesMgr1 --&gt; FSRep2[FS Rep]     SalesMgr2 --&gt; FSRep3[FS Rep]     SalesMgr2 --&gt; FSRep4[FS Rep]     ServMgr --&gt; ServRep1[Serv Rep]     ServMgr --&gt; ServRep2[Serv Rep] </pre>	Works with this role combination:	Participants roll up to one top-level participant.
	Fails with this role combination:	Participants do not roll up to one participant. They roll up to two sales managers.
	Fails with this role combination:	The field sales reps roll up to a sales manager who is not a participant.

For This Reporting Structure	Forecasting Works/Fails	Because
	Works with this role combination: <ul style="list-style-type: none"> <li>Executive</li> <li>Sales Manager</li> <li>Field Sales Rep</li> </ul>	Participants roll up to one participant.
	Fails with this role combination: <ul style="list-style-type: none"> <li>Executive</li> <li>Sales Manager</li> <li>Field Sales Rep</li> </ul>	Two participants report to no one. Only one participant in the forecast (at the top of the structure) can report to no one.

## Setting Up Sales Processes, Categories, and Coaches

You can create a customized sales methodology that reflects the requirements and complexity of your sales environment, and guides your sales representatives as they work on deals at various sales stages.

You can adjust the sales stage information to reflect your company's sales process or business practices. When employees create and update opportunities, they select a sales stage that represents how far along the opportunity is in the sales process. Each sales stage is tied to a percentage. That information is used with reports and forecasts, including your pipeline, expected revenue, and closed revenue calculations.

As part of customizing the sales stage values themselves, you can:

- Rename the sales stages
- Add or delete sales stages
- Change the sequence of the sales stages
- Change the probability percentages associated with the sales stages

## About Sales Processes

Some sales environments require only one sales process with one set of sales stages. Other sales environments are more complex and require multiple sales processes with distinct sales stages for each process. For example, internal sales representatives might follow a different sales process from the one followed by field sales representatives.

Additionally, sales representatives might need to follow different sales processes for different types of opportunities. For example, when your sales representatives are selling a piece of equipment, they might need to follow a longer, multi-stage sales process. But when they are selling a service contract, the process might be shorter and have fewer sales stages.

To further refine your sales methodology, you can define series of sales stages as sales processes and link each process to one of these:

- Opportunity type
- User's role

This allows you to customize the sales process (and sales stages with each process) for different opportunity types or different user roles.

**Example:** Your sales representative creates a new opportunity. When entering information about the opportunity, she selects Service from the Opportunity Type options. This causes the application to display the sales process appropriate for that opportunity type.

**NOTE:** The sales process based on opportunity type overrides the defaulted sales process based on a user's role. In other words, when an employee creates an opportunity, her role's default sales process is assigned to the opportunity. If she then selects an opportunity type that has an assigned sales process, the sales process for the opportunity is then driven based on the opportunity type she selected.

## About Sales Categories

You can also set up sales categories, such as Stage 1, 2, or 3, which you can link to specific sales stages across different sales processes. When you need to consolidate information from different processes, you can run reports against the sales stage categories, providing an accurate view of your pipeline across all opportunity types or roles.

## About Sales Process Coach

You can also use the Sales Process Coach to guide your team through completing the necessary information accurately at each sales stage. The Sales Process Coach provides specific steps for employees to follow as well as useful information, such as documents, templates, and competitive information. You can also enforce the collection of information based on how opportunities progress through the sales cycle. In addition, when an opportunity record is saved, you can specify that certain tasks are automatically created, which appear in your employee's task list.



As part of the sales process coach, you can:

- Add information for each sales stage that employees access through the Coach button
- Set up requirements for each sales stage, such as fields to be filled in. These serve as prerequisites before saving the opportunity at a new stage.
- Set up automated tasks that are generated when employees save their opportunities with different sales stages

If you change any Sales Stage names after the system has been deployed, all previous records maintain their assigned Sales Stage until you manually update them.

**NOTE:** To change the default picklist values for the Probability % field, you need to edit that field from the Opportunity Field Setup page (see [Changing Picklist Values](#) (on page 568)).

When setting up your sales methodology, follow this general process:

- 1 Set up the sales categories (if you have more than one sales process).
- 2 Set up the sales process (or processes).
- 3 Set up the sales stages for each sales process.
- 4 Set up the coaching feature for the sales stages.

***Before you begin:***

- To perform this procedure, your role must include the Sales Stage Definition privilege.
- If you want to assign a sales process based on the Opportunity Type field, make sure the picklist values are the ones you want to use. The default Opportunity Type values are Renewal and New Business. For instructions on customizing picklist values, see [Changing Picklist Values](#) (on page 568).

Also, make sure that the Opportunity Type field appears in the page layout for each role you want to use it with. For instructions, see [Customizing Static Page Layouts](#) (on page 570).

***To set up a sales category (optional)***

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Sales Methodology section, click the Sales Categories link.
- 4 From the Translation Language drop-down list, select your company's primary language.
- 5 On the Sales Stage Categories page, click New or Edit.

- 6 On the Sales Stage Category Edit or Sales Stage Category New page, complete the required information.

Field	Description
Order	Sequence of the Sales Categories as they appear in Siebel CRM On Demand Answers.
Mark for Translation	<p>(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.</p> <p>New names you add automatically appear (without brackets and in black text) in the other activated languages, regardless of the setting of the Mark for Translation check box.</p> <p>However, the names that you update are affected by the Mark for Translation check box. If you select this check box, the updated name appears in the picklists for the other activated languages (in blue text with brackets) until you manually enter the translated versions. This blue text helps you to track what terms must be translated. If you do not select the Mark for Translation check box, the updated name does not appear in the other languages, and the other languages are not affected by the changes that you make on this page.</p>

- 7 Save the record.
- 8 To manually enter the translated equivalent of the new Stage Category:
- a From the Translation Language drop-down list, select the language.
  - b Click the Edit link next to the name.
  - c Enter the translated equivalent in the Stage Category field, and click Save.

### *To set up a sales process*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Sales Methodology section, click the Sales Processes link.
- 4 From the Translation Language drop-down list, select your company's primary language.
- 5 On the Sales Process List page, click New or Edit.

- 6 On the Sales Process Edit or New page, complete the required information.

Field	Description
Default Sales Process	Company's default sales process. If no other sales process is assigned to your user role or to the opportunity type for the record, this sales process is used.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

- 7 Click Save.

- 8 To link the sales process to an Opportunity Type field value:

- a On the Sales Process List page, click the Sales Process Name you want to link.
- b In the Associated Opportunity Types title bar, click Add.
- c Select the Opportunity Type, and click Save.

**NOTE:** You can link only one sales process to each opportunity type. After you do that, the opportunity type value is removed from the picklist for selection with other sales processes. This prevents you from linking more than one sales process to an opportunity type.

When employees have records with the Opportunity Type field corresponding to the value you selected, they see the sales stages for this sales process.

- 9 To manually enter the translated equivalent of the new Sales Process:

- a Go back to the Sales Process List page.
- b From the Translation Language drop-down list, select the language.
- c Click the Edit link next to the name.
- d Enter the translated equivalent in the Sales Process field and click Save.

- 10 To select the sales process to use as the default:

- a On the Sales Process List page, click the Sales Process Name you want to set as the default.
- b Click the Edit button.
- c Select the Default Sales Process check box.
- d Save the record.

**NOTE:** This sales process is displayed for records or roles that have no other linked sales process.

### *To set up sales stages for a sales process*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Sales Methodology section, click the Sales Processes link.
- 4 On the Sales Process List page, click the Sales Process Name link.
- 5 To set up a sales stage:
  - a In the Sales Stage title bar, click New, or in the row for an existing sales stage, click Edit.
  - b On the Sales Stage Edit page, complete the required information.

Field	Description
Default Probability	Percentage that reflects the confidence that the deal will close with the specified revenue on the specified close date. By default, probability adjusts automatically based on sales stage of opportunity. Users can manually override this value.  <b>Important:</b> Do not set up any other Sales Stages with probabilities equal to 0 or 100 percent except Closed/Lost and Closed/Won. Modifying picklists that are used internally by the CRM On Demand application can have an adverse impact on standard functionality.
Order	Sequence of the Sales Stages as they appear in the picklist. If you add a Sales Stage, you need to change the order value for all subsequent Sales Stages. This way, you can be sure that the Sales Stage drop-down list in the Opportunity pages has the information in the correct order.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.
Sales Category	Category that this sales stage falls under.

- 6 Save the record.
- 7 To manually enter the translated equivalent of the new Sales Stage:
  - a From the Translation Language drop-down list, select the language.
  - b Click the Edit link next to the name.
  - c Enter the translated equivalent in the Sales Stage Name field and click Save.
- 8 Save the record.

***To set up the coaching feature for the sales stages***

- 1** In the upper right corner of any page, click the Admin global link.
- 2** In the Business Process Management section, click the Data Rules & Assignment link.
- 3** In the Sales Methodology section, click the Sales Processes link.
- 4** From the Translation Language drop-down list, select your company's primary language.  
If you don't select your company's primary language, the Mark for Translation check box doesn't appear, and the application doesn't indicate untranslated terms you add here.
- 5** On the Sales Stage List page, click the sales stage link (in the Sales Stage column) you want to set up the coaching information for.
- 6** To make a field required for this sales stage:
  - a** In the Additional Required Fields title bar, click New.
  - b** On the Edit Additional Required Field page, select the field from the drop-down list.
  - c** Review the tips for entering default values that appear onscreen, and then enter the value you want to have as the default (optional).
  - d** When you enter a default value, the default value is added to the record only if that field is blank. For example, if the record already has a Revenue value, specifying a default value for Revenue here will not cause the revenue amount already saved in the record to be overwritten.
  - e** Save the record.
- 7** To add guidelines for the sales stage for your employees to review, such as objectives and milestones to be achieved in the stage:
  - a** In the Process Coach Steps title bar, click New.
  - b** On the Process Coach Step page, enter a number to indicate the sequence for this information to appear.  
  
When employees click the Coach button from their opportunity records, they can see the first 10 substeps. If you add more than 10, employees can view the entire list by clicking the Show Full List link.
  - c** To mark the information for translation, select the Mark for Translation check box.
  - d** Save the record.  
  
When employees click the Coach button from their opportunity records for an opportunity record with this sales stage, this information appears on their Sales Process Coach page.

- 8** To add an attachment or URL for employees to access resources appropriate to the sales stage:

- a** In the Useful Resources title bar, click Add Attachment or Add URL.
- b** On the Attachment Edit or URL Edit page, enter the information.
- c** Save the record.

When employees click the Coach button from their opportunity records, the list of attachments or URLs linked to this sales stage appear on their Sales Process Coach page.

- 9** To define tasks that are automatically created when employees update the sales stage:

- a** In the Automated Tasks title bar, click New.
- b** On the Automated Tasks Edit page, enter the information.

The information you set up here serves as a template for each task. The newly-created task is linked to this opportunity, so it appears on the Opportunity Detail page as well as the appropriate activity lists.

**NOTE:** You must enter a number in the Due Date field to indicate how many days after the task is created that the task is due. For example, if the task is created on December 6 and you entered 10 here as the Due Date, the task appears on the employee's task lists as due on December 16.

For Owner, this behavior applies:

- a** The task is created for every user having the role you select.
- b** If no user fulfills the account team role, the task is assigned to the opportunity owner.
- c** Save the record.

- 10** To manually enter the translated equivalent of the new Sales Stage:

- a** From the Translation Language drop-down list, select the language.
- b** Click the Edit link next to the name.
- c** Enter the translated equivalent in the Sales Stage Name field and click Save.

- 11** Save the record.

## Customizing Your Company's Industry List

Industry is a picklist field on account records. It is used to track the business type of the account. You can add and remove industries, or change the display name of industries on the list. This allows you to adjust the industry picklist to match the nomenclature familiar to your company.

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Data Rules & Assignment link.
- 3 In the Industry Definition section, click the Industry Definition link.
- 4 From the Translation Language drop-down list, select your company's primary language.

If you don't select your company's primary language, the Mark for Translation check box doesn't appear, and the application doesn't indicate untranslated terms you add here.

- 5 On the Industry Edit page, fill in the information.

**NOTE:** The Industry SIC Code is one of the fields on the Industry Edit page. The Standard Industrial Classification (SIC) system is a series of numeric codes that classify all businesses by the types of products or services they make available. Businesses engaged in the same activity, whatever their size or type of ownership, are assigned the same SIC code. The SIC codes were developed to facilitate the collection, tabulation, and analysis of data, and to promote comparability in statistical analyses.

- 6 To manually enter the translated equivalent of the new industry:
  - a From the Translation Language drop-down list, select the language.
  - b Enter the translated equivalent in the Display Name field and click Save.
- 7 Save the record.

## About Workflow Rules

*Workflow* is the management and coordination of work actions to support business processes. Siebel CRM On Demand allows you to use workflow rules to configure the system to perform certain work actions automatically. A *workflow rule* is an instruction to the system to perform one or more actions each time a specified event occurs.

## About Setting Up Workflow Rules Functionality

To enable the workflow rules functionality in Siebel CRM On Demand, your application must be configured by Customer Care and by your company administrator:

- **Customer Care setup.** When workflow is set up by Customer Care, the Administer Workflow Rules link is visible in the Business Process Management section of the Admin Homepage. Also, the Administrator user role has the Manage Data Rules - Manage Workflow Rules privilege enabled. For more information about user roles, see [Adding Roles](#) (on page 608).
- **Enable Workflow option.** Workflow rules cannot be executed until the company administrator selects the Enable Workflow check box on the Company Profile page. For information about configuring your company profile, see [Setting Up Your Company Profile and Global Defaults](#) (on page 529).
- **Integration events.** If your company wants to use workflow rules to create integration events, contact Customer Care to request support for Integration Event Administration and to specify the size of the Integration Queue you require. For more information about managing integration events, see [About Integration Events](#) (on page 764).
- **Books.** If your company wants to use workflow rules to update the associations between records and books, contact Customer Care to request support for Book Management. For more information about book management, see [Setting Up Books](#) (on page 626).

## Workflow Rule Trigger Events and Actions

A workflow rule is evaluated when the event specified on the rule (the trigger event) occurs. If the conditions on the rule are met (or if there are no conditions on the rule), the actions specified on the rule are performed.

For example, you can create a workflow rule to specify that when an opportunity is created (the workflow rule trigger event), an email is to be sent to the opportunity owner's manager (the workflow rule action). You can also specify that the email is to be sent only if the revenue on the opportunity is in excess of a certain amount (the workflow rule condition), and you can specify the content of the email.

Workflow rules can be triggered when:

- A record is created, updated, or deleted.
- A record is associated with another record, or dissociated from another record.

Association and dissociation workflow rule triggers are supported only for associations between accounts and contacts, and between opportunities and contacts.

You cannot configure time-based workflow rules—for example, you cannot configure rules that are triggered by a record's due date having passed, or by a record not having been worked on for some time. Workflow rules are configured for a record as a whole, and not for individual fields.

There are six types of trigger events. Depending on the trigger event, you can specify that the system is to automatically perform one or more actions when the workflow rule conditions are met.



**NOTE:** After a rule is created, you cannot change the record type or trigger event on the rule. However, you can update the workflow condition.

The following table shows the actions that are available for each trigger event.

Trigger Event	Available Actions
When new record saved	<ul style="list-style-type: none"> <li>Create Email Notification</li> <li>Create Task</li> <li>Assign a Book</li> <li>Create Integration Event</li> </ul>
When modified record saved	<ul style="list-style-type: none"> <li>Create Email Notification</li> <li>Create Task</li> <li>Assign a Book</li> <li>Create Integration Event</li> </ul>
When record is deleted	<ul style="list-style-type: none"> <li>Create Email Notification</li> <li>Create Task</li> <li>Create Integration Event</li> </ul>
Before modified record saved	<ul style="list-style-type: none"> <li>Update Values</li> </ul>
After association with parent	<ul style="list-style-type: none"> <li>Create Email Notification</li> <li>Create Integration Event</li> </ul>
After dissociation from parent	<ul style="list-style-type: none"> <li>Create Email Notification</li> <li>Create Integration Event</li> </ul>

The following information applies to workflow rules and rule actions:

- Workflow rule conditions.** If you define conditions on a workflow rule, the workflow rule actions are performed only if the rule conditions are met when the rule is triggered. If the conditions are not met, the actions are not performed. If you do not define any conditions on a workflow rule, the workflow rule actions are performed each time the rule is triggered.
- Multiple actions on workflow rules.** If you specify more than one action for a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule.
- Record types.** You can create workflow rules for a number of record types. However, each workflow rule applies to only one record type. This means that if you create a workflow rule for a specific record type and you want the same action to occur for another record type, you must create a second workflow rule (with the same trigger event, rule conditions, and action) for the second record type.

- **Single-record context.** A workflow rule that is triggered when a record is created, updated, or deleted, is restricted to work in the context of a single record—that is, such a workflow rule can access and update fields on only one record.

**NOTE:** When a workflow rule is triggered by a record association or dissociation action, the integration event created by the workflow can contain fields from both the child record and the parent record.

- **The Update Values action.** The Update Values action allows you to update fields automatically when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what was changed).
- **Integration events.** An integration event is a mechanism for triggering external processes based on changes (create, update, delete, associate, dissociate) to the records in the CRM On Demand application. You can specify which fields on a record are to be tracked. When the value changes in a tracked field, the change will be recorded in an integration event. For more information about integration events, see [About Integration Events](#) (on page 764).

## Association and Dissociation Trigger Events

Association and dissociation trigger events on workflow rules are supported only for associations between accounts and contacts, and between opportunities and contacts. The actions that are available for association and dissociation trigger events are as follows:

- Create Email notification
- Create integration event

The following table describes the actions that can trigger an association or dissociation workflow rule. It also shows the integration events that are generated by the workflow rule in each case (if an integration event action is configured on the workflow rule).

**NOTE:** Depending on the data in the records, additional integration events can be generated. For example, if a new contact created on an account is the primary contact for the account, an additional (account update) integration event is generated.

Action	Parent Record	Child Record	Channel	Integration Event
Create a new contact on an account.	Account	Contact	User Interface	Account: Update Contact : Insert Contact: Associate
			Web Services	Contact: Insert Contact: Associate Account: Update

Action	Parent Record	Child Record	Channel	Integration Event
Link an existing contact to an account.	Account	Contact	User Interface	Account Contact: Insert Contact: Update
			Web Services	Contact: Associate Account: Update
Remove a contact from an account.	Account	Contact	User Interface	Account Contact: Delete Contact: Update
			Web Services	Contact: Dissociate Account: Update
Link an existing account to a contact.	Contact	Account	User Interface	Account Contact: Insert Account: Update
			Web Services	Account Contact: Insert Contact: Update
Remove an account from a contact.	Contact	Account	User Interface	Account Contact: Delete Contact: Update
			Web Services	Account Contact: Delete Contact: Update
Create a new opportunity on a contact.	Contact	Opportunity	User Interface	Opportunity: Insert Opportunity: Associate
			Web Services	Opportunity: Insert Opportunity: Associate Contact: Update
Remove an opportunity from a contact.	Contact	Opportunity	User Interface	Opportunity: Dissociate
			Web Services	Opportunity: Dissociate

Action	Parent Record	Child Record	Channel	Integration Event
Create a new contact on an opportunity.  <b>NOTE:</b> This action is not available through the user interface.	Opportunity	Contact	Web Services	Contact: Insert Contact: Associate
Link an existing contact to an opportunity.	Opportunity	Contact	User Interface	Opportunity: Update Opportunity Contact Role: Insert
			Web Services	Contact: Associate Opportunity: Update
Remove a contact from an opportunity.	Opportunity	Contact	User Interface	Opportunity Contact Role: Delete Contact: Update Opportunity: Update
			Web Services	Contact: Dissociate Opportunity: Update

## Workflow Rule Action Failures

If a workflow rule action fails to complete, the following happens:

- If an Update Value action fails, the operation that triggered the rule is blocked and none of the other actions on the workflow rule are performed. An error message displays to tell the user that the operation has failed.
- If any other type of workflow rule action fails, the user gets an error message but the operation that triggered the rule is not blocked, and other actions on the rule are performed.

## Latency

Workflow rules are evaluated in sequence and synchronously. Therefore, until all the rules are evaluated, the overall update operation is not completed. Workflow rules add a certain amount of latency to operations (that is, the time between the start of an operation and its completion). For example, each task created by a workflow rule can add as much as 20% latency to a record update operation. Each email created by a workflow rule adds about 5% latency.

Expressions take less time to evaluate. To minimize latency, add restrictive expressions in your workflow conditions, so that the actions are executed only when necessary. Build your workflow rules incrementally, keeping performance in mind.

Click a topic to see step-by-step procedures to do the following:

- [Creating Workflow Rules](#) (on page 661)
- [Creating Workflow Rule Actions](#) (on page 663)
- [Changing the Order of Workflow Rule Actions](#) (on page 667)

## Creating Workflow Rules

**Before you begin:** Workflow functionality in Siebel CRM On Demand must be set up for your company, as described in [About Workflow Rules](#) (on page 655). To perform the procedures described in this topic, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 608).

**NOTE:** After a rule is created, you cannot change the record type or trigger event on the rule. However, you can update the workflow condition.

### *To create a workflow rule*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Administer Workflow Rules link.
- 3 On the Workflow Rules List page, click the New button.
- 4 In the Key Workflow section of the Workflow Rule Detail page, fill in the rule information. The following table describes the rule fields.

Field	Description
Workflow Rule Name	Enter a unique name, up to 50 characters.
Active	Use the Active check box to enable and disable the rule. Any number of workflow rules can be active at the same time.

Field	Description
Record Type	<p>Select the record type for the workflow rule.</p> <ul style="list-style-type: none"> <li>■ For create, update, and delete trigger events, each workflow rule relates to one record type only. The rule is evaluated for that type of record and the actions are performed on that type of record. After a rule is created, you cannot change the record type on the rule.</li> <li>■ For workflow rules where the trigger event is After association with parent trigger event or After dissociation from parent trigger event on the rule, select the record type of the child record. For example, if you want the workflow rule to be triggered when a contact record is associated with an account record, select Contact in this field, and select Account in the Parent Record Type field.</li> </ul>
Trigger Event	<p>Select the event that triggers the rule.</p> <p>When this event occurs on a record of the specified type, the rule is evaluated. After a rule is created, you cannot change the trigger event on the rule.</p> <p><b>NOTE:</b> The trigger events After association with parent and After dissociation from parent are supported only for the Account, Contact, and Opportunity record types. For more information, see the Association and Dissociation Trigger Events section of the <a href="#">About Workflow Rules (on page 655)</a> topic.</p>
Parent Record Type	<p>This field is displayed if you select the After association with parent trigger event or the After dissociation from parent trigger event.</p> <p>Select the parent record type. For example, if you are setting up a workflow rule that will be triggered when a contact record is associated with a parent account record, select Account in this field, and select Contact in the Record Type field.</p>

- 5 If you want to define conditions on the workflow rule, click the *fx* icon in the Workflow Rule Condition section of the Workflow Rule Detail page and use the Siebel Query Language Expression Builder to define the workflow rule condition. For more information about Expression Builder, see [Creating Expressions with Expression Builder \(on page 781\)](#).

**NOTE:** If you do not define any conditions for the workflow rule, the actions on the rule will be performed each time the rule is triggered.

When creating conditions on workflow rules, note the following points:

- You can configure workflow rules that are specific to a particular role or channel. Use the expression `ExcludeChannel()` to pick and choose channels. Use the expression `UserValue('<Role>')` to construct role-based conditions, for example:

```
UserValue('Role')="Administrator" AND [<Priority>]="High"
```

- In a workflow rule expression, you can determine if a field has been updated before activating a workflow action by using an expression such as the following in the condition on the workflow rule:

```
PRE(' <Field Name>' ) <> [ <Field Name> ]
```

To deal with the case where a previous value was never set on the field, use the following expression:

```
[ <Field Name> ] <> IFNULL ( PRE(' <Field Name>' ), "Invalid" )
```

## 6 Save the rule.

When you have saved the rule, you can create actions for the rule. For more information, see [Creating Workflow Rule Actions](#) (on page 663).

## Related Information

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 655)
- [Creating Workflow Rule Actions](#) (on page 663)
- [Changing the Order of Workflow Rule Actions](#) (on page 667)

## Creating Workflow Rule Actions

You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

**NOTE:** If you specify more than one action for a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. After you have created the workflow rule actions, you can change the order of the actions. For more information, see [Changing the Order of Workflow Rule Actions](#) (on page 667).

When creating workflow rule actions, you use the Siebel Query Language Expression Builder to select fields from records and to define expressions to calculate variables. You can merge the record fields and variables into the Subject and Message body text of an email, the Subject and Description text of a task, or the new value for a field that is to be updated. For more information about Expression Builder, see [Creating Expressions with Expression Builder](#) (on page 781).

Field names in expressions in the Subject and Description fields on tasks, and in the Subject and Message Body fields on emails, are designated by %%%[<FieldName>]%%%. For example, the specification for the text of an email could include the following:

```
Hello Mr %%%[<ContactLastName>]%%%,
```

This is similar to the syntax used in Web Links. For more information about Web Links, see [Setting Up Web Links](#) (on page 563).

If the same expression is used in places other than tasks and email, the expression is specified as "Hi Mr."+[<fieldName>].

Field names are replaced by field values when the workflow rules are implemented.

**Before you begin.** To perform the procedures described in this topic, you must have the Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see [Adding Roles](#) (on page 608).

### *To create a workflow rule action*

- 1 Navigate to the rule where you want to create the action:
  - a In the upper-right corner of any page, click the Admin global link.
  - b In the Business Process Management section, click the Administer Workflow Rules link.
  - c On the Workflow Rules List page, find the rule where you want to create the action.  
For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 63).
- 2 Click the Workflow Name link on the rule.
- 3 In the Actions title bar on the Workflow Rule Detail page, click the Menu button, and select the type of action that is to be performed.  
The trigger event on the workflow rule determines what types of actions can be created on the rule.
- 4 In the Key Action Details section of the Workflow Action Edit page, enter a name for the action. If you want to enable the action, select the Active check box.
- 5 Depending on the action type, complete the details of the action as follows, and then save the rule:
  - For Create Email Notification actions, fill in the fields described in the following table.

**NOTE:** The address that appears in the From field in emails sent by workflow rules is a system default. You cannot change this address.

Field	Description
To	<p>Select or enter the mail recipient:</p> <ul style="list-style-type: none"><li>■ Select the type of recipient (Related User on Record or Specific User), and then select the recipient:<ul style="list-style-type: none"><li>■ If you select Related User on Record, select the recipient from the drop-down list.</li><li>■ If you select Specific User, click the Lookup icon, and select the user.</li></ul></li><li>■ Alternatively, select the Valid Email Address option, and enter an email address.</li></ul>



Field	Description
Subject	<p>Enter the subject line for the email, or click the <i>fx</i> icon beside the field, and use the Expression Builder to define the subject line for the email. Using the Expression Builder, you can embed individual expressions into the text. The embedded expressions are surrounded by '%%'. You can use the Check Syntax button in the Expression Builder to test your syntax.</p> <p>If you are entering only static text, you do not need to use the Expression Builder.</p>
Message Body	Enter the message for the email, or click the <i>fx</i> icon beside the field, and use the Expression Builder, as described for the Subject field.

- For Create Task actions, fill in the fields described in the following table.

Field	Description
Owner	<p>Select the type of owner for the task (Related User on Record or Specific User), and then select the owner:</p> <ul style="list-style-type: none"> <li>■ If you select Related User on Record, select the user from the drop-down list.</li> <li>■ If you select Specific User, click the Lookup icon, and select the task owner.</li> </ul>
Type	Select the activity type from the drop-down list.
Due Date	Specify the due date by entering a numeric value. The due date is calculated by adding this value to the date that the task is created.
Priority	Select the activity priority from the drop-down list.
Status	Select the activity status from the drop-down list.
Task Currency	Select a currency.
Private	Select this check box if you want the task to be visible only to the task owner.

Field	Description
Subject	<p>Enter the subject line for the task or click the <i>fx</i> icon beside the field and use the Expression Builder to define the subject for the task. Using the Expression Builder, you can embed individual expressions into the text. The embedded expressions will be surrounded by '%%'. You can use the Check Syntax button in the Expression Builder to test your syntax.</p> <p>If you are entering only static text, you do not need to use the Expression Builder.</p>
Description	Enter the description of the task or click the <i>fx</i> icon beside the field and use the Expression Builder, as described for the Subject field.

- For Create Integration Event actions, save the workflow action, then click the Configure link beside the action name on the Workflow Rule Detail page. In the Field Tracking page, select the Track Changes check box for each field that you want to track. For more information on integration events, see [About Integration Events](#) (on page 764).
- For Assign a Book actions, click the selector button beside the Book Name field then, in the Book lookup, choose the book to which you want to assign records. Select the Assignment Option and the Apply To option. For a description of the options, see [Assigning Records to Books](#) (on page 630).
- For Update Values actions, fill in the fields described in the following table.

Field	Description
Field Name	Select the name of the field that is to be updated from the drop-down list.
Value	<p>Click the <i>fx</i> icon beside the field, and define the expression that calculates the new value for the field. You can use the Check Syntax button in the Expression Builder to test your syntax.</p> <p>If you define an expression to calculate a field, such as a custom Margin field, where:</p> $\text{Margin} = \text{Revenue} - \text{Cost}$ <p>the field value is calculated each time the workflow rule is triggered, even if the Revenue or the Cost has not changed. For better performance, you can define an additional condition on the workflow rule, such as:</p> <pre>FieldValue('&lt;Revenue&gt;') &lt;&gt; PRE('&lt;Revenue&gt;') OR FieldValue('&lt;Cost&gt;') &lt;&gt; PRE('&lt;Cost&gt;')</pre> <p>The PRE function returns the value that was in the field before the field was updated.</p>

Field	Description
Overwrite Existing Values	<p>Select this check box if the existing value in the field is to be overwritten with the new value.</p> <p>If the field already contains a value, the value will not be updated unless this check box is selected.</p> <p>If the field is blank, the field is updated with the new value, even if this check box is not selected.</p>

## Related Information

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 655)
- [Creating Workflow Rules](#) (on page 661)
- [Changing the Order of Workflow Rule Actions](#) (on page 667)

## Changing the Order of Workflow Rule Actions

If there is more than one action on a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule.

### *To change the order of the actions on a workflow rule*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Business Process Management section, click the Administer Workflow Rules link.
- 3 On the Workflow Rules List page, find the rule where you want to change the order of the actions.  
  
For information about searching for workflow rules in the list page, see [Filtering Lists](#) (on page 63).
- 4 Click the Workflow Name link on the rule.
- 5 In the Actions title bar on the Workflow Rule Detail page, click the Edit Order button.
- 6 On the Edit Action Order page, use the directional arrows to change the order of the actions.
- 7 Click Save to save your changes.

## Related Information

See the following topics for related workflow information:

- [About Workflow Rules](#) (on page 655)
- [Creating Workflow Rules](#) (on page 661)
- [Creating Workflow Rule Actions](#) (on page 663)

## Data Management Tools

From the Data Management Tools section of the Admin Homepage, you can perform the following tasks:

- Import and export your company data. For more information, see [Import and Export Tools](#) (see "Import and Export Tools" on page 668).
- View batch delete requests. For more information, see [Batch Delete Queue Page](#) (on page 762).
- View batch book assignment requests. For more information, see [Batch Assign Book Queue Page](#) (see "Assigning Records to Books" on page 630).
- Administer the integration event queue. For more information, see [About Integration Events](#) (on page 764).

## Import and Export Tools

You can import data from comma-separated value (CSV) files to automatically create records in Siebel CRM On Demand. This table describes what types of records you can create by importing data and how many records you can import each time you run the import process:

Record Type	Record Limit for Each Import
Account	30000
Account Team	50000
Appointment	30000
Appointment Contact	50000
Appointment User	50000
Asset	80000
Contact (Admin)	30000
Contact Team	50000

Record Type	Record Limit for Each Import
Campaign	50000
Campaign Recipient	50000
Lead	30000
Note	50000
Opportunity	30000
Opportunity Product	80000
Product	80000
Product Category	30000
Solution	50000
Service Request	30000
Task	30000
Task Contact	50000
Task User	50000
User	500

**NOTE:** If your import is greater than the available record limit, check with Customer Care to explore other options.

Depending on your administrative configuration, the following records can be made available to import:

Record Type	Record Limit for Each Import
Contact Role	50000
Custom Object 1	30000
Custom Object 2	30000
Custom Object 3	30000
Dealer	80000
Portfolio	30000
Vehicle	80000

Each CSV file must be less than 4 MB in size. To reduce the file size, either divide the records into several files or reduce the data by deleting columns you don't want to import.

The import process consists of these steps:

- [Preparing for Data Importing](#) (on page 670)
- [Importing Your Data](#) (on page 749)
- [Reviewing Import Results](#) (on page 753)

You can also export data from Siebel CRM On Demand to CSV files. For information about exporting, click a topic:

- [Exporting Your Company's Data](#) (on page 759)
- [Reviewing Export Results](#) (on page 761)

### Before you begin:

- To import data, your role must include either the Administration Import privilege or the Marketing Import privilege. The Administration Import privilege lets you import all record types, whereas the Marketing Import privilege lets you import only accounts, contacts, and leads.
- Review this entire section as well as the tutorial lessons on importing records, which provide additional information for performing imports (best practices).

**CAUTION:** You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5-10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on data importing or contact Customer Care. For information on those resources, click the Training and Support link at the top of each page within Siebel CRM On Demand.

- To export data, your role must include the Administration Export privilege.

## Preparing for Data Importing

You might need to edit data in your CSV file or customize Siebel CRM On Demand to make sure all your file data is imported. To determine if that is necessary, do the following before you begin importing:

- Determine the record types you want to import.

### Before You Import Data

You might want to import different record types, such as leads, accounts, contacts, and notes. You must import one record type at a time, and you should follow the recommended sequence for importing.

For example, if you have a file that contains a list of your contacts and another file with your accounts, you want to import accounts first and then contacts to maintain the relationships set up between those record types.

The sequence order is shown on the user interface itself (Import and Export Tools pages) as well as in the [Data Checking Guidelines](#) (on page 673) section.

- Check the data in your file to make sure it:

- Has consistent capitalization, abbreviations, and spelling

Text values are imported exactly as they appear in your CSV file. Therefore, any differences in capitalization can result in additional records being created, when that is not desired. For example, all these values for Account Names would result in new records: ABC, abc, A.B.C.

Additionally, since two account records are recognized as identical if the account name *and* location are identical, addresses must be spelled, capitalized, and abbreviated identically to prevent additional records from being created. For example all these records would **not** be considered identical:

ABC, 111 10th Avenue

ABC, 111 10th Ave.

ABC, 111 10th Ave

ABC, 111 Tenth Avenue

- Does not exceed the maximum length allowed

- Conforms to the formatting requirements for that field

For more information, see [Data Checking Guidelines](#) (on page 673).

- Check the application for required fields for the record type you want to import.

You must map data in your CSV file to all required fields. If you don't, the record is rejected. To determine which fields are required, see the Edit page for the record type you want to import. Required fields are shown in red text.

- Add fields to the application if you want to import data that doesn't map to the default fields in the application.

During the import process, you must match every field in your file to an existing field in the application to capture that data. If your role includes the Customize Application privilege, you can create new (custom) fields in Siebel CRM On Demand to map to those. For instructions, see [Creating and Editing Fields](#) (on page 559).

- Set up picklist values, if necessary.

During the import process, you can specify how you want the application to handle picklist values in your CSV file that don't match existing picklist values in the application:

- Add them as new ones to the application

**NOTE:** To see the picklist value changes in the application, you might need to sign out and in again.

- Don't add them (capture only the values that match and leave the others blank)

If you want to use the picklist values that exist in the application and import only the data that matches them, verify that the picklist values match exactly, including their spelling and capitalization (values are case-sensitive).

Some picklist values cannot be changed, and a few don't follow this behavior. See [Data Checking Guidelines](#) (on page 673) and review the guidelines for the record type you want to import.

- Select the correct time format.

If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows:

- If the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM.
- If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

### Related Topics

Changing Picklist Values	568
Import and Export Tools	668

## Linking Records During Import

When you import records, you may want to link them to existing records in the database. For example, you might link a contact record (John Smith) to an account record (Smith Auto Repair).

A record must already exist in the database before you can link another record to it during import. Therefore, when you have more than one type of record to import, it is best to import them in the order in which they appear on the Import and Export Tools page. For example, import account records before you import contact records.

You can link records during import in one of two ways:

- by indicating the name of the linked record or
- by indicating its external ID code.

In either case, you must make sure that your import CSV file includes a column containing the data.

## Using the Name to Link Records

To link records by indicating the name, include a column in your import file for the name of the linked record. For example, to import contact records that are linked to accounts:

- add an Account Name column to your import file
- fill in the name of the appropriate account for each contact record
- use the Import Assistant to map the Account Name column to the Account field in the contact record.



**NOTE:** If a contact record is imported with an associated account that does not yet exist in the database, one can be created during import. The system-created account record will use the contact's address for the account billing and shipping addresses. To enable this feature, select the **Create Associated Record** option in Step 1 of the Import Assistant.

## Using the External ID to Link Records

You can import a unique identifier code into the External ID field for each record in the application. Then, you can use the External ID field to create links between records in subsequent imports.

For example, an exported CSV file of contact records identifies an associated account for each contact. Each account is represented by a numeric code, rather than by a name, in a column called Account Code. When importing these records, first import the account records, mapping the Account Code column in the CSV file to the External ID field in the application. Next, import the contact records, mapping the Account Code column in the CSV file to the Account External ID field in the Siebel CRM On Demand contact record to create a link between the contact and account records.

## Data Checking Guidelines

Check the data in your CSV file before importing it into Siebel CRM On Demand:

- 1 Check the guidelines for the field type the data is. See [Field Type Guidelines for Importing Data](#) (on page 674).
- 2 Check the specific information pertaining to each record type you want to import. Both the list shown in the product and this list show the recommended sequence for importing records:
  - [User Fields: Import Preparation](#) (on page 682)
  - [Account Fields: Import Preparation](#) (on page 684)
  - [Account Team Fields: Import Preparation](#) (on page 689)
  - [Contact Fields: Import Preparation](#) (on page 690)
  - [Contact Team Fields: Import Preparation](#) (on page 698)
  - [Product Category Fields: Import Preparation](#)
  - [Product Fields: Import Preparation](#) (on page 698)
  - [Opportunity Fields: Import Preparation](#) (on page 700)
  - [Opportunity Product Fields: Import Preparation](#) (on page 703)
  - [Opportunity Contact Role Fields: Import Preparation](#) (on page 705)
  - [Campaign Fields: Import Preparation](#) (on page 705)
  - [Lead Fields: Import Preparation](#) (on page 707)

- [Service Request Fields: Import Preparation](#) (on page 712)
- [Solution Fields: Import Preparation](#) (on page 680)
- [Appointment, Task, and Call Fields: Import Preparation](#) (on page 713)
- [Task Contact Fields: Import Preparation](#)
- [Task User Fields: Import Preparation](#) (on page 716)
- [Appointment Contact Fields: Import Preparation](#) (on page 717)
- [Appointment User Fields: Import Preparation](#) (on page 717)
- [Note Fields: Import Preparation](#) (on page 718)
- [Asset Fields: Import Preparation](#) (on page 719)
- [Portfolio Fields: Import Preparation](#) (on page 720)
- [Dealer Fields: Import Preparation](#)
- [Vehicle Fields: Import Preparation](#)
- [Custom Object Field: Import Preparation](#)
- [Campaign Recipient Fields: Import Preparation](#) (on page 731)
- [Task Contact Fields: Import Preparation](#)

**TIP:** Use the Tips listed in the guidelines as a checklist before you begin the import process.

**NOTE:** The data checking guidelines use examples relevant to the North American installations of Siebel CRM On Demand. Other country-specific installations may change the default lists of valid values so that they differ from the information shown in this section. For example, the list of valid state/province values would likely be different for a non-North American installation. In addition, valid values may be different, depending on the languages supported.

## Field Type Guidelines for Importing Data

Make sure the data you want to import meets the specifications for its field type. The field types described in this topic are:

- Text
- Picklist
- Number
- Integer
- Currency
- Percent
- Check box
- Email

- Phone
- Date/Time
- Date

### Text

Each text field in Siebel CRM On Demand has a maximum length. Excess characters are not imported. The Import Results email message warns you when this situation occurs.

**TIP:** Compare the length of the data you want to import against the allowed length. (Open the file in a spreadsheet application and use one of the spreadsheet functions to determine the longest value in a column.) When the data exceeds the limit, consider importing it into a custom field, splitting the data into two separate fields, or abbreviating some data so that it fits within the target length.

### Picklist

Picklist fields allow a user to select a value from a list of values for the field. During the import process, you can specify either to add new picklist values from your CSV file to the application or not to add them.

**NOTE:** If the user's language setting is the same as the company-level language setting, they will always see the picklist values option. If the user's language is different from the company's language setting, they don't see that option. For example, if the company language is French, a user with language set to French can see that option, but a user in the same company with language set to English does not see it.

If you choose not to add them, only picklist values that exactly match the ones in the application are imported. (Values are case-sensitive.) The Import Results email message warns you when this situation occurs.

The company administrator has the ability to change the picklist values for fields except for a few specific fields (for the exceptions, see the guidelines for the record type you want to import).

**NOTE:** If you select the option to add new picklist values when importing data, those new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during that time period.

### *To compare the data in your file to the valid values in the application*

- 1 Open your file in a spreadsheet application.

**TIP:** If you open the file in Microsoft® Excel, you can use the AutoFilter feature to see which values appear for specific columns in your file.

- 2 Compare the values in your file against the valid values in Siebel CRM On Demand by doing one of the following:
  - If you are an administrator, click the Admin global link in the application and go to the Field Setup page containing the field whose values you want to compare.
  - In Siebel CRM On Demand, click the appropriate tab and select a record. On the Edit page, click the drop-down list for the field you want to check, and compare those values against your data.

**TIP:** If you decide to restrict the import data to *only* those values that match the existing ones, make sure every imported value matches an existing value. Case matters when determining if there is a match. You can either change the data in the import file to match the valid values or add picklist values to the application (see [Changing Picklist Values](#) (on page 568)).

### Number

Import data can be any number between -2,147,483,648 and 2,147,483,647. Commas in your import data are ignored as well as digits after a decimal point (rounding does *not* occur). For example, all these valid values appear as 1,234 in the application:

1234  
1,234  
1234.9

During import, if a value with unexpected characters is found or the value is out of the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Number fields are represented in a common format in the application (for example: 1,234).

### Integer

Integers can be any whole numbers ranging in value from - 2147483648 to 2147483647.

### Currency

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Import data can be preceded by a \$ or other currency character. Negative numbers are valid.

During import, if a value with unexpected characters is found or the value contains too many digits, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Currency fields are represented in a common format in the application (for example: \$1,000,000.00).

### Percent

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Negative numbers are valid. Import data may be preceded or followed by a % character and any number of spaces between the number and the %. For example, all these valid values appear as 1,234.36% in the application:

1234.36  
1,234.36  
1234.35678  
1234.36%  
1,234.36 %

During import, if a value with unexpected characters is found or the value is out of the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Percent fields are represented in a common format in the application (for example: 1,234.36% (with commas and followed by a % sign)).

### Check box

A check box has only two settings: checked or unchecked. The following table shows you the values you can use when importing data. These values are not case-sensitive, so the application recognizes "true," "t," and so on.

Check box is selected	Check box is blank (not selected)
1	0
Y	N
Yes	No
T	F
True	False
Checked	Unchecked

All other values in the import data result in an unchecked setting for the check box field in the application. The Import Results email message does *not* warn you when this situation occurs.

You must use your translated equivalents of the values in the tables, if you are importing under a different language. However, the application will accept the values in the first two rows of the table, regardless of your language setting: Y, N, 1, 0.

**TIP:** Check for values that might be expected to result in the checked setting but that are not recognized as such during import. Convert those values to Y before importing.

During the import process, if a check box field for the record type being imported is not mapped to an import file field, its value is set to unchecked for each imported record.

### Email

If the import data does not match a certain format, the data for the field is not imported. The following criteria are considered invalid:

- Email data ending or beginning with the at sign (@) or period (.). Both symbols must be surrounded by alpha-numeric characters. For example, these values are not valid:  
a@.  
@a.  
@.a  
a@a.  
a@.a  
@a.a
- Empty string
- String too long
- No characters before the @ at sign, for example: @rightequip.com
- No @ at sign, for example: isamplerightequip.com
- No period (.), for example: isample@rightequipcom
- No domain, for example: isample@
- No domain suffix such as com, for example: isample@rightequip
- Multiple at signs (@), for example: isample@@rightequip.com
- Consecutive periods (.), for example: isample@rightequip..com
- Spaces in the string, for example: isa mple@rightequip
- Characters other than the following in the local part of an email address:
  - Uppercase and lowercase letters (case insensitive)
  - The digits 0 through 9
  - The characters ! # \$ % & ' \* + - / = ? ^ \_ ` { | } ~ .
- Any special characters in the domain name of an email address. Special characters include: ! # \$ % & ' \* + - / = ? ^ \_ ` { | } ~ ()

The Import Results email message warns you when data for the field is not imported as a result of incorrect formatting.

### Phone

The same format rules for entering phone number data apply to importing phone number data. Data in a recognized phone number format is converted to a consistent format in the application.

The field length rules that apply to text fields also apply to phone number fields. In particular, if the import data exceeds the length of the application field, the excess characters are *not* imported. The Import Results email message warns you when this situation occurs.

## Date/Time

Import data can contain several different date/time representations. As part of the importing process, you select the format used in your CSV file.

Regardless of their imported format, Date/Time fields are represented in a common format in the application (for example: 01/19/1964 12:15 PM). The format used to display data is determined by the Locale setting of the user, which is shown on the Personal Detail page.

The date/time values are assumed to be correct for the time zone of the person doing the import, as specified on their Personal Detail page in the application. After the dates/times are imported, however, users viewing the data from a different time zone see the date/time adjusted for their time zone.

**TIP:** Make sure that the time zone of the person performing the import matches the time zone of the date/times in the import data file. For instance, if the date/times specified in the import data are relevant to Pacific Standard Time, and a user in the Eastern Standard Time zone imports that data, all times will be incorrect by three hours. The solution is for the user to temporarily set the time zone to Pacific Standard Time when doing the import, so the times are imported correctly. Be sure you know what time zone the date/times in your import file are relative to before you start an import. Note that it is very common for date/times in CSV data files to be in Greenwich Mean Time (GMT) format, so be sure to check this item prior to import.

### ■ About Dates in Date/Time Field Type

When running the Import Assistant, you are required to specify whether import data has dates with month (MM) first, or day (DD) first. If you specify month first, the following formats are supported:

MM/DD/YY  
MM/DD/YYYY  
MM/DD (year defaults to current year)

If you specify day first, the following formats are supported:

DD/MM/YY  
DD/MM/YYYY  
DD/MM (year defaults to current year)

You may also specify that the import data format is: YYYY-MM-DD.

For all these formats, MM and DD can contain a leading 0 when the date or month is a single digit, but the 0 is not required.

**NOTE:** Dates in the format DD-MON-YY or DD-MON-YYYY are *not* currently supported.

### ■ About Times in Date/Time Field Type

A time can be specified in the import data. To specify a time with a date, include a space after the date and then the time. If there is no time specified with a date, the time is set to 00:00:00 (midnight). The following time formats are supported:

HH24:MI:SS  
HH:MI:SS AM  
(where HH24 represents a 24-hour time, and AM represents either AM or PM if HH is a 12-hour value)

MI or SS can be omitted; and if omitted, they are set to 00 during import. HH, MI and SS can contain a leading 0 when the value is a single digit, but the 0 is not required.

**NOTE:** Regardless of the date/time format option you select during import, the import process accepts times in 24-hour format. For example, if you select the default Canada format, which is hh:mm:ss AM/PM, and your file shows a time of 15:00:00, the data is properly imported as 3:00:00 PM.

### Date

Date type fields in the application allow entry and display of only a date; they do not allow time to be specified. When importing into one of these fields, valid import data formats are the same as for Date/Time type fields. However, time should *not* be specified in the import data. If a time is specified, it is ignored during the import.

Regardless of their imported format, Date fields are represented in a common format in the application (for example: 12/18/2003).

### About Required Fields

If a field has been designated as required (either by default or by the administrator), the entire record is rejected if you don't map the required fields to columns in your CSV file. The Import Results email message warns you when this situation occurs.

**TIP:** Review the fields for the record type you are importing to determine which ones are required fields. Make sure the import data contains a valid value for all those fields.

### About Read-Only Fields

Read-only fields follow this behavior during an import:

- If a read-only field has a picklist, you must match the picklist values exactly to import them.
- If you have read-only access to a field, you are not able to import data into that field.

## Solution Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing solutions into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.



**CAUTION:** Integration ID is an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

Default Solution Field Name	Data Type	Maximum Length	Comments
External Unique ID	Text	30	
FAQ	Text	250	
Integration ID			
Product Category	Picklist	100	
Published	Picklist	1	Default valid values are Y and N. These values must be in English, regardless of your language settings.
Service Request Count	Integer	22	
Solution Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Solution Details	Text	16,000	
Solution Rating	Number	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Status	Picklist	30	Default valid values: Draft, Approved, Obsolete
Title	Text	100	Required field by default.

### Related Topics

Solution Fields 223

Field Type Guidelines for Importing Data 674

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## User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing users into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

**CAUTION:** Integration ID is an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

Default User Field Name	Data Type	Maximum Length	Comments
Alias	Text	50	Required field by default.
Alternate Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Alternate Address 2, 3	Text	100	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Alternate City	Text	50	
Alternate Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Alternate PO Box/Sorting Code	Text	30	
Alternate Province	Text	50	For Canada, see <a href="#">About Countries and Address Mapping</a> (on page 731). However, this is not a picklist field.
Alternate US State	Picklist	2	For the list of valid US state values, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Alternate Zip/Post Code	Text	30	

Default User Field Name	Data Type	Maximum Length	Comments
Cellular Phone #	Phone	40	
Currency	Text	50	This field is set at the company level, and, consequently, you cannot import this field or edit its picklist values.
Department	Text	75	
Division	Text	75	
Email	Text	50	Required field by default.
Email Temporary Password When I Click Save	Check box	n/a	If you select this check box and save, an email with a temporary password is sent to the user.
Employee Number	Number	30	
External Unique ID	Text	30	Contains the External ID of the imported record.
First Name	Text	50	Required field by default.
Fund Approval Limit	Number	22	Specific to Siebel CRM On Demand High-Tech Edition.
Integration ID	Text	30	Identifier used for integrating with external systems.
Language	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the standard valid values.
Last Name	Text	50	Required field by default.
Locale	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Middle Name	Text	50	
Mr./Ms.	Picklist	15	
Reports To	Text	Not applicable	This is a calculated field, based on the manager's first and last name.
Reports To External ID	Text	30	

Default User Field Name	Data Type	Maximum Length	Comments
Role	Picklist	50	Required field by default. Default valid values: Administrator, Executive, Field Sales Rep, Inside Sales Rep, Sales & Marketing Manager, Service Manager, Service Rep.
Status	Picklist	30	Required field by default. Default valid values: Active, Inactive.
Time Zone	Text and number	100	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Work Fax #	Phone	40	
Work Phone #	Phone	40	Required field by default.

### Related Topics

Field Type Guidelines for Importing Data	674
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## Account Fields: Import Preparation

The following table contains specific information about setting up your records before importing accounts into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains the initial (default) name for each field. Your company administrator may have changed the default names. Therefore, if you do not see a specific field when you try to do an import, check with your administrator to determine the new name for the field.

**CAUTION:** Integration ID is an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

Default Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.

Default Account Field Name	Data Type	Maximum Length	Comments
Account Name	Text	100	This field is required by default. Therefore, make sure all records have values in this field before import.
Account Type	Picklist	30	Default valid values: Competitor, Customer, Partner, and Prospect
Annual Revenues	Currency	15	
Billing Address 2, 3	Text	100 each	
Billing Address1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Billing City	Text	50	
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Billing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Billing Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Billing US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Billing Zip/Post Code	Text	30	

Default Account Field Name	Data Type	Maximum Length	Comments
Call Frequency	Picklist	30	Specific to Siebel CRM On Demand Life Science Edition. You can edit this picklist.
Description	Text	1999	If a Description field in the import file exceeds 1999 characters, it is truncated to 1900 characters and the remaining characters are added to linked Notes, each with a maximum limit of 4095 characters.
External Unique ID	Text	30	
Furigana Name	Text	100	The Furigana equivalent of the Kanji (for Japanese only).
HIN	Text		Health Industry Number. Specific to Siebel CRM On Demand Life Science Edition.
Industry	Picklist	50	<p>The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. Alternatively, your company's Siebel CRM On Demand administrator can create a custom Account field that contains the valid values that you expect in your import data. This would allow you to import your data into that custom field instead of this field.</p> <p>Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications</p>
Influence Type	Picklist		Specific to Siebel CRM On Demand Life Science Edition. You can edit this picklist.
Integration ID			
Last Call Date	Date		Specific to Siebel CRM On Demand Life Science Edition.
Location	Text	50	<p>In most cases, this field is used to determine record duplication. For more information, see <a href="#">About Record Duplicates and External IDs</a> (on page 755).</p> <p>For example, to distinguish between headquarters and a branch office of Account XYZ, the application checks both the Account Name and the Location to determine if the record is a duplicate.</p>

Default Account Field Name	Data Type	Maximum Length	Comments
Main Fax #	Phone	40	
Main Phone #	Phone	40	
Market Potential	Picklist	30	Specific to Siebel CRM On Demand Life Science Edition. You can edit this picklist.
Market Segment	Picklist		Specific to Siebel CRM On Demand Life Science Edition. You can edit this picklist.
Market Share	Number		Specific to Siebel CRM On Demand Life Science Edition.
Modified By	n/a	n/a	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Number of Employees	Integer	n/a	
Number of Physicians	Integer		Specific to Siebel CRM On Demand Life Science Edition.
Owner	Email	50	<p>File data must match the Sign On User ID for an existing Siebel CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	
Parent Account	Text	100	Must be a valid Account name.
Parent Account External ID	Text	30	
Parent Account Location	Text	50	
Partner	Check box		Indication that the account is a partner.
Priority	Picklist	30	Default valid values: Low, Medium, and High

Default Account Field Name	Data Type	Maximum Length	Comments
Public Company	Check box	n/a	This field should be set to the checked state if this is a public (versus privately-owned) company.
Reassign Account	Check box	n/a	Indication that the account should be reassigned. When imported, triggers automatic assignment rules for this account record, if your company administrator or manager has set that feature up.
Reference	Check box	n/a	This field should be set to the checked state if this account agreed to be a reference that you can give out to prospects.
Reference as of	Date	n/a	
Region	Picklist	25	Default valid values: East, West, and Central
Route	Picklist	30	Specific to Siebel CRM On Demand Life Science Edition. You can edit the picklist.
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Shipping Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Shipping City	Text	50	
Shipping Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Shipping PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 731)).



Default Account Field Name	Data Type	Maximum Length	Comments
Shipping Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Shipping US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Shipping Zip/Post Code	Text	30	
Source Campaign	Picklist		The campaign that generated the account.
Status	Picklist	30	Specific to Siebel CRM On Demand Life Science Edition. You can edit the picklist.
Territory	Text	255	
Web Site	Text	100	No formatting checking (except length checking) is done on the imported data for this field.
YTD Revenue	Currency		Specific to Siebel CRM On Demand Life Science Edition.

## Account Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing account teams into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Account Team Field Name	Field Type	Maximum Length	Comments
Account Access	Picklist	15	Default valid values: Full, Readonly, Edit, Owner.  You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Location	Text	50	
Account Name	Text	100	
Contact Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access.  You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Opportunity Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access.  You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Team Role	Text	20	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	
Account External ID	Text	30	
User External ID	Text	30	

## Contact Fields: Import Preparation

If you have separate files to import for accounts and contacts, import the accounts first, and then the contacts. Be sure that your Contacts import file contains valid account names from the Accounts import file.

If you only have a Contacts import file, account records are created based on the account name data found in the Account Name field in the Contacts import file. If the contact record contains Alternate address data, this data is copied into the Account's Billing and Shipping address fields (address, city, state/province, zip/postal code, and country).

If multiple contacts are associated with the same account, the account's address fields are set to the Alternate address values associated with the first contact imported for that account. If the first contact imported does not contain alternate address data-but subsequent records *do*, the account's address fields are blank, since only the first imported contact is considered when setting the values of the account address fields. Therefore, if you are importing only from a

Contacts import file, before importing, sort the data by Account Name, then make sure that the first contact for each different Account Name contains the address you want to use for the account.

The following table contains specific information about setting up your CSV file before importing contacts into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. Your company administrator may have changed the default names. Therefore, if you do not see a specific field when you try to do an import, check with your administrator to determine the new name for the field.

**CAUTION:** Integration ID an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

Default Contact Field Name	Data Type	Maximum Length	Comments
Account	Text	100	The text for this field is one of several fields used to match an existing Account record. If no match is found, it is the Account Name for a new Account that gets created as part of the Contact import process. For more information, see <a href="#">About Record Duplicates and External IDs</a> (on page 755).
Account External ID	Text	30	
Account Location			The text for this field is one of several fields used to match an existing Account record. For more information, see <a href="#">About Record Duplicates and External IDs</a> (on page 755).
Assistant Name	Text	50	
Assistant Phone #	Phone	40	
Best Time to Call	Picklist	30	Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning, and Saturday. Specific to Siebel CRM On Demand Life Science Edition. You can edit this picklist.
Call Frequency	Picklist	30	Default values are No See, 1-2 Times/Year, 3-4 Times/Year, and >5 Time/Year. Specific to Siebel CRM On Demand Life Science Edition. You can edit this picklist.

Default Contact Field Name	Data Type	Maximum Length	Comments
Cellular Phone #	Phone	40	
Contact Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Contact Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Contact City	Text	50	
Contact Country	Picklist	30	Default values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Contact Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contact PO Box/Sorting Code	Text	50	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Contact Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Contact Type	Picklist	30	Default valid values: Prospect, Customer, Partner, and Competitor

Default Contact Field Name	Data Type	Maximum Length	Comments
Contact US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Contact Zip/Post Code	Text	30	
Credit Score	Number	22	Specific to Siebel CRM On Demand Financial Services Edition.
Currency	Picklist		You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Current Investment Mix	Picklist		Default values are Aggressive, Moderate, and Conservative. Specific to Siebel CRM On Demand Financial Services Edition. You can edit this picklist.
Customer ID	Text		Specific to Siebel CRM On Demand Financial Services Edition.
Date of Birth	Date		Specific to Siebel CRM On Demand Financial Services Edition.
Degree	Picklist	30	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN, and Master of Public Health. Specific to Siebel CRM On Demand Life Science Edition. You can edit this picklist.
Department	Text	75	
Description	Text	1999	If a Description field in the import file exceeds 1999 characters, it is truncated to 1900 characters and the remaining characters are added to linked Notes, each with a maximum limit of 4095 characters.
Email	Text	100	

Default Contact Field Name	Data Type	Maximum Length	Comments
Experience Level	Picklist	30	Default values are None, Limited, Good, and Extensive. Specific to Siebel CRM On Demand Financial Services Edition. You can edit this picklist.
External Unique ID	Text	30	
First Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Gender	Picklist		Default values are F and M. You can edit this picklist. Specific to Siebel CRM On Demand Financial Services Edition.
Home Phone #	Phone		
Home Value	Currency		Specific to Siebel CRM On Demand Financial Services Edition.
Integration ID			
Investment Horizon	Picklist		Default values are Short term, Medium term, and Long term. You can edit this picklist. Specific to Siebel CRM On Demand Financial Services Edition.
Job Title	Text	75	
Last Call Date	Date/Time		Specific to Siebel CRM On Demand Life Science Edition.
Last Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Lead Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, and Other.

Default Contact Field Name	Data Type	Maximum Length	Comments
Life Event	Picklist		Default values are Marriage, Birth of Child, Retirement, Divorce, and Other. Specific to Siebel CRM On Demand Financial Services Edition.
Manager	n/a	n/a	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Contact Edit page).
Manager External ID	Text	30	
Marital Status	Picklist		Default values are Single, Divorced, Married, Partner, Separated, Widowed, and Widower. Specific to Siebel CRM On Demand Financial Services Edition.
Market Potential	Picklist	30	Default values are High, Medium, and Low. Specific to Siebel CRM On Demand Life Science Edition.
Middle Name	Text		
Modified By	n/a	n/a	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr./Ms.	Picklist	15	Default valid values: Miss., Mr., Ms., Mrs., and Dr.
Never Email	Check box	n/a	
Objective	Picklist	30	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth, and International Diversification. Specific to Siebel CRM On Demand Financial Services Edition.
Opt In	Check box	n/a	Specific to Siebel CRM On Demand Life Science Edition.
Opt Out	Check box	n/a	Specific to Siebel CRM On Demand Life Science Edition.
Own or Rent	Picklist	30	Default values are Own or Rent. Specific to Siebel CRM On Demand Financial Services Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Owner	Email	50	<p>File data must match the User Sign In ID for an existing Siebel CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On email ID of the user performing the import.</p> <p>If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On email ID of the user performing the import for all of the imported records.</p>
Owner External ID	Text	30	
Primary Goal	Picklist	30	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets, and Retirement. Specific to Siebel CRM On Demand Financial Services Edition.
Private	Check box	n/a	This field should be set to the checked state if you want this contact to be visible only to the account owner.
Risk Profile	Picklist	30	Default values are Risk Averse, Risk Taker, Conservative, Moderate, and Aggressive. Specific to Siebel CRM On Demand Financial Services Edition.
Route	Picklist	30	Default values are Route 1, Route 2, Route 3, and Route 4. Specific to Siebel CRM On Demand Life Science Edition.
Segment	Picklist	30	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth. Specific to Siebel CRM On Demand Financial Services Edition.
Self-Employed	Check box	n/a	Specific to Siebel CRM On Demand Financial Services Edition.
Source Campaign	Picklist		The campaign that generated the contact.



Default Contact Field Name	Data Type	Maximum Length	Comments
Tax Bracket	Number	22	Specific to Siebel CRM On Demand Financial Services Edition.
Tier	Picklist		Default values are Gold, Silver, Bronze, Top 100, Top, Medium, and Low. Specific to Siebel CRM On Demand Financial Services Edition.
Time Zone	Picklist		You are not able to edit this picklist. Therefore, the values you import must exactly match the standard valid values.
Total Assets	Currency		Specific to Siebel CRM On Demand Financial Services Edition.
Total Expenses	Currency		Specific to Siebel CRM On Demand Financial Services Edition.
Total Income	Currency		Specific to Siebel CRM On Demand Financial Services Edition.
Total Liabilities	Currency		Specific to Siebel CRM On Demand Financial Services Edition.
Total Net Worth	Currency		Specific to Siebel CRM On Demand Financial Services Edition.
Type	Picklist	30	Default values are Prospect, Customer, Partner, and Competitor.
Work Fax #	Phone	40	
Work Phone #	Phone	40	
YTD Sales	Currency		Specific to Siebel CRM On Demand Life Science Edition.

### Related Topics

Contact Fields 169

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Contact Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact teams into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Contact Team Field Name	Data Type	Maximum Length	Comments
Contact Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access.  You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contact Full Name	Text	60	
Team Role	Text	20	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	
Contact External ID	Text	30	
User External ID	Text	30	

### Related Topics

Sharing Records (Teams)	68
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Importing Your Data	749

## Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing products into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Product Field Name	Data Type	Maximum Length	Comments
Body	Picklist	30	Specific to Siebel CRM On Demand Automotive Edition.  Default valid values: Coupe, Salon, Cabriolet, Hatchback, Wagon, Sedan
Category	Picklist	30	Default valid values: Clothing, Tractor, SUV, Interior, Heavy Truck, Exterior, Electrical, DriveTrain, Light Truck, Passenger Car
Controlled	Check box	n/a	
Dealer Invoice Price	Currency	15	Specific to Siebel CRM On Demand Automotive Edition.
Description	Text	250	
Door	Picklist	30	Specific to Siebel CRM On Demand Automotive Edition.  Default valid values: 3 Door, 2 Door, 4 Door
Engine	Picklist	30	Specific to Siebel CRM On Demand Automotive Edition.
Lot # Tracking	Check box	n/a	
Make	Picklist	30	Specific to Siebel CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Siebel CRM On Demand Automotive Edition.
Orderable	Check box	n/a	
Parent Product	Text	100	
Part #	Text	50	
Price Type	Picklist	30	
Product Category	Text	100	
Product Currency	Currency	15	
Product Name	Text	100	Required field by default.

Default Product Field Name	Data Type	Maximum Length	Comments
Product Type	Picklist	30	
Revision	Picklist	30	
Serialized	Check box	n/a	
Status	Picklist	30	
Sub Type	Picklist	30	
Therapeutic Class	Picklist	30	Specific to Siebel CRM On Demand Life Science Edition.
Transmission	Picklist	30	Specific to Siebel CRM On Demand Automotive Edition.
Trim	Picklist	30	Specific to Siebel CRM On Demand Automotive Edition.
Type	Picklist	30	
Year	Number	50	Specific to Siebel CRM On Demand Automotive Edition.

### Related Topics

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunities into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

**CAUTION:** Integration ID is an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Account	Text	100	Required field by default.
Account External ID	Text	30	
Account Location	Text		
Close Date	Date	7	Required field by default.
Dealer	Picklist		Specific to Siebel CRM On Demand Automotive Edition.
Description	Text	1999	If a Description field in the import file exceeds 1999 characters, it is truncated to 1900 characters and the remaining characters are added to linked Notes, each with a maximum limit of 4095 characters.
Expected Revenue	Currency		Cannot be imported. Value that is calculated based on potential revenue field multiplied by value in Probability field.
External Unique ID	Text	30	
Forecast	Check box		
Integration ID			
Lead Source	Picklist	30	
Make	Picklist		Specific to Siebel CRM On Demand Automotive Edition.
Model	Picklist		Specific to Siebel CRM On Demand Automotive Edition.
Modified By	n/a	n/a	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Next Step	Text		
Opportunity Currency	Picklist		Read-only

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Opportunity Currency	Text	20	
Opportunity Name	Text	100	Required field by default.
Owner	Text	50	
Owner External ID	Text	30	
Priority	Picklist	30	Default valid values: Low, Medium, High
Probability %	Picklist		<p>Default valid values: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100</p> <p><b>NOTE:</b> This field should always be exposed in the layout. If it is hidden, unexpected results occur.</p>
Product Interest	Text	100	Specific to Siebel CRM On Demand Financial Services Edition.
Reason Won/Lost	Picklist	30	Default valid values: Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision, Other
Reassign Opportunity	Check box	n/a	
Revenue	Currency	15	
Sales Stage	Picklist	50	<p>Required field by default.</p> <p>This field behaves differently from most fields; it will not add picklist values that do not match even if you specify that during the import process. The import data must match the valid values for this field. If you want to capture picklist values from your CSV file that do not match the default picklist values, add them to the application before importing your data. Otherwise, the entire record is rejected. Default valid values are: Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won, Closed/Lost.</p>
Source Campaign	Picklist		The campaign that generated the opportunity.
Status	Picklist		Default valid values are Pending, Lost, and Won.
Territory	Text	50	

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Total Asset Value	Currency	15	Specific to Siebel CRM On Demand Financial Services Edition.
Total Premium	Currency		Specific to Siebel CRM On Demand Financial Services Edition.
Type	Picklist	30	
Year	Picklist		Specific to Siebel CRM On Demand Automotive Edition.

## Opportunity Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunity product records into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

**CAUTION:** Integration ID is an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
# of Periods	Integer	3	
Asset Value	Currency		
Contact Full Name	Text		
Contract	Picklist		
Description	Text	250	
External Unique ID	Text	30	
Forecast	Check box	n/a	
Frequency	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
Integration ID			
Opportunity External ID	Text	30	
Opportunity Name	Picklist		You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner External ID	Text	30	
Premium	Currency	15	
Probability %	Picklist	22	
Product External ID	Text	30	
Product Name	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Purchase Date	Date		
Purchase Price	Currency	15	
Quantity	Number	15	
Serial #	Text		
Ship Date	Date		
Start/Close Date	Date		
Status	Text	30	
Type	Picklist	30	
Warranty	Picklist		



**Related Topics**

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Opportunity Contact Role Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing roles for contacts into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Contact Role Field Name	Data Type	Maximum Length	Comments
Buying Role	Picklist	39	Default valid values: User, Evaluator, Approver, Decision Maker, User and Evaluator, User and Approver, User and Decision Maker, Evaluator and Approver, Evaluator and Decision Maker, Unknown
Contact External ID	Text	30	
Contact Name	Text	255	
Opportunity External ID	Text	30	
Opportunity Name	Text	100	
Primary	Check box	n/a	

**Related Topics**

Contact Fields 169

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Campaign Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing campaigns into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Campaign Field Name	Data Type	Maximum Length	Comments
Actual Cost	Currency	15	
Audience	Text	2000	
Budgeted Cost	Currency	15	
Campaign Currency	Picklist	15	
Campaign Email	Text	50	
Campaign Name	Text	50	Required field by default.
Campaign Phone #	Phone	40	
Campaign Type	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, Other
Description	Text	1999	If a Description field in the import file exceeds 1999 characters, it is truncated to 1900 characters and the remaining characters are added to linked Notes, each with a maximum limit of 4095 characters.
End Date	Date	7	
External Unique ID	Text	30	
Leads Targeted (#)	Integer	n/a	
Objective	Text	2000	
Offer	Text	255	
Owner	Text		
Owner External ID	Text	30	
Revenue Target	Currency	15	
Source Code	Text	30	Required field by default.
Start Date	Date	7	
Status	Picklist	30	Default valid values: Planned, Active, Completed

## Related Topics

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## Lead Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing leads into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed. Your company administrator may have changed the default names. Therefore, if you do not see a specific field when you try to do an import, check with your administrator to determine the new name for the field.

**CAUTION:** This is an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

Default Lead Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	
Alias	Text	50	
Annual Revenues	Currency	15	
Associated Account	n/a	n/a	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Lead Edit page).
Associated Contact	n/a	n/a	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Lead Edit page).
Associated Opportunity	n/a	n/a	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Lead Edit page).

Default Lead Field Name	Data Type	Maximum Length	Comments
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Billing Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see <a href="#">About Countries and Address Mapping</a> (on page 731).
Billing City	Text	50	
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Billing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see <a href="#">About Countries and Address Mapping</a> (on page 731)).
Billing Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast.
Billing US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Billing Zip/Post Code	Text	50	

Default Lead Field Name	Data Type	Maximum Length	Comments
Campaign	n/a	n/a	This value is specified when using the Siebel CRM On Demand Lead Import Assistant. It is not possible to directly set values for the Campaign field in the import data.
Campaign External ID	Text	30	
Cellular Phone #	Phone	40	
Company	Text	100	
Contact External ID	Text	30	
Created By	n/a	n/a	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Description	Text	1999	
Email	Text	100	
Estimated Close Date	Date	7	
External Unique ID	Text	30	
First Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).

Default Lead Field Name	Data Type	Maximum Length	Comments
Industry	Picklist	50	<p>Siebel CRM On Demand does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. Alternatively, your company's Siebel CRM On Demand Administrator can create a custom Lead field that contains the valid values that you expect in your import data. This allows you to import your data into that custom field instead of this field.</p> <p>Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications</p>
Integration ID			
Job Title	Text	75	
Last Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Lead Currency	Text	20	
Owner			
Modified By	n/a	n/a	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr./Ms.	Picklist	15	Default valid values: Miss., Mr., Ms., Mrs., and Dr.
Never Email	Check box	n/a	
Next Step	Text	250	
Number of Employees	Integer	15	
Opportunity External ID	Text	30	
Potential Revenue	Currency	15	
Primary Phone #	Phone	40	

Default Lead Field Name	Data Type	Maximum Length	Comments
Product Interest	Text	100	
Rating	Picklist	30	Default valid values: A, B, C, and D
Reassign Lead Owner	n/a	n/a	This value is specified for all leads in a specific import when using the Siebel CRM On Demand Lead Import Assistant. It determines whether the imported leads are assigned to new owners based on Lead Assignment Rules defined for your company.
Referred By	Picklist		
Sales Person			
Sales Person External ID	Text	30	
Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, and Other
Status	n/a	n/a	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values and they must match the business logic.
Web Site	Text	100	
Work Fax #	Phone	40	

### Related Topics

Leads Fields 131

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Importing Your Data 749

## Service Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing service requests into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Service Request Field Name	Data Type	Maximum Length	Comments
Account	Text	100	
Account External ID	Text	30	
Area	Picklist	30	Default valid values: Product, Installation, Maintenance, Training, and Other
Cause	Picklist	30	Default valid values: Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Closed	Time	Date/Time	
Contact	Text	255	
Contact External ID	Text	30	
Dealer	Picklist		Siebel CRM On Demand Automotive
Description	Text	1999	If a Description field in the import file exceeds 1999 characters, it is truncated to 1900 characters and the remaining characters are added to linked Notes, each with a maximum limit of 4095 characters.
External Unique ID	Text	30	
Opened Time	Date/Time		
Owner	Text	50	
Owner External ID	Text	30	



Default Service Request Field Name	Data Type	Maximum Length	Comments
Priority	Picklist	30	Default valid values: 1-ASAP, 2-High, 3-Medium, 4-Low
Product	Picklist		
Reassign Owner	Check box	n/a	
Servicing Dealer	Text		Siebel CRM On Demand Automotive
Source	Picklist	30	Default valid values: Phone, Web, Email, Fax
SR Currency	Text	20	
SR Number	Text	64	
Status	Picklist	30	Default valid values: Open, Pending, Closed, Open - Escalated, Cancelled
Subject	Text	250	
Type	Picklist	30	Default valid values: Question, Issue, Enhancement Request, Other

### Related Topics

Service Request Fields 211

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Appointment, Task, and Call Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing appointments and tasks into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

**CAUTION:** Integration ID is an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

**NOTE:** Select the correct time format. If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows: if the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM. If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
Account	Text	100	
Account External ID	Text	30	
Account Location	Text		
Activity	Text		
Activity Currency	Picklist		You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Campaign	Text	50	
Campaign External ID	Text	30	
Contact	Text	255	
Contact External ID	Text	30	
Description	Text	1999	
Due Date	Date	7	For tasks, required field by default.
End Time	Date/Time		For appointments, required field by default.
External Unique ID	Text	30	
Fund Request	Picklist		Specific to Siebel CRM On Demand High-Tech Edition. Read-only.
Integration ID			
Lead	Text	255	
Lead External ID	Text	30	
Location	Text	100	For appointments only.

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
MedEd Event	Picklist	50	Specific to Siebel CRM On Demand Life Science Edition.
Opportunity	Text	100	
Opportunity External ID	Text	30	
Owner	Text	255	For tasks and appointments, required field by default.
Owner External ID	Text	30	
Priority	Picklist	30	For tasks, required field by default. Default valid values: 1-High, 2-Medium, 3-Low
Private	Check box	n/a	
Service Request	Text	64	
Service Request External ID	Text	30	
Start Time	Date/Time		For appointments, required field by default.
Status	Picklist		For tasks, the default valid values are: Completed, Deferred, In Progress, Waiting For Someone Else, Not Started
Subject	Text	100	For tasks and appointments, required field by default.
Task Currency	Text		You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Type	Picklist	30	For tasks and appointments, the default valid values are: Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Other, Personal, Presentation, To Do

### Related Topics

Activity Fields 104

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Task Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and a task into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Task Contact Field Name	Data Type	Maximum Length
Contact Full Name	Text	60
Contact External ID	Text	30
Task External ID	Text	30

### Related Topics

Field Type Guidelines for Importing Data	674
Importing Your Data	749

## Task User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and a task into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Task User Field Name	Data Type	Maximum Length
User ID	Text	50
Task External ID	Text	30
User External ID	Text	30

**Related Topics**[Field Type Guidelines for Importing Data](#) 674[Importing Your Data](#) 749

## Appointment Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and an appointment into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Appointment Contact Field Name	Data Type	Maximum Length	Comments
Contact Full Name	Text		
Contact External ID	Text	30	
Appointment External ID	Text	30	

**Related Topics**[Field Type Guidelines for Importing Data](#) 674[Importing Your Data](#) 749

## Appointment User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and an appointment into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Appointment User Field Name	Data Type	Maximum Length	Comments
User ID	Text		
Appointment External ID	Text	30	
User External ID	Text	30	

#### Related Topics

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Note Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing notes into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed..

Default Note Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	
Account Name	Text	255	
Campaign External ID	Text	30	
Campaign Name	Text	255	
Contact External ID	Text	30	
Contact Name	Text	255	
Description	Text	4095	

Default Note Field Name	Data Type	Maximum Length	Comments
Opportunity External ID	Text	30	
Opportunity Name	Text	100	
Private	Check box	n/a	
Service Request External ID	Text	30	
Service Request Number	Number	15	
Subject	Text	30	Required field by default.

### Related Topics

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Asset Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing assets into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

**CAUTION:** Integration ID is an advanced field used by Siebel CRM On Demand integration technologies, such as Siebel CRM UAN On Demand. Your company must not set or change this value.

Default Asset Field Name	Data Type	Maximum Length	Comments
Account	Text	100	
Account External ID	Text	30	
Asset Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contract	Text	30	
Customer Contact	Text	255	

Default Asset Field Name	Data Type	Maximum Length	Comments
Description	Text	250	
Expiration Date	Date	7	
External Unique ID	Text	30	
Install Date	Date	7	
Integration ID			
Notify Date	Date		Specific to Siebel CRM On Demand High-Tech Edition.
Operating Status	Text	30	
Product External ID	Text	30	
Product Name	Text	100	Required field by default.
Purchase Date	Date	7	
Purchase Price	Currency		
Quantity	Number	15	
Serial #	Text	100	
Ship Date	Date	7	
Warranty	Text	30	

### Related Topics

Tracking Assets 147

Field Type Guidelines for Importing Data 674

Importing Your Data 749

## Portfolio Fields: Import Preparation

**NOTE:** This feature might not be available in your version of the application since it is not part of the standard application.

The following table contains specific information about setting up your CSV file before importing the portfolio accounts into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.



**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Number	Text	100	
Account Type	Picklist	30	Default valid values: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings, and Other.
Annual % Rate	Number	15	
Cancelled/Sold Date	Date	7	
Credit Limit	Currency	20	
Effective Date	Date	7	
Expiration Date	Date	7	
External Unique ID	Text	30	
Face Value	Currency	20	
Institution	Text	100	

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Institution Location	Text	50	
Loan Amount	Currency	20	
Maturity	Date	7	
Premium	Currency	20	
Primary Owner ID	Text	50	
Product	Text	50	
Purchase Date	Date	7	
Revenue	Currency	20	
Risk Class	Text	50	
Status	Picklist	30	Default valid values: Active, Pending, Quote, Terminated, and Closed.
Term	Number	20	
Term Unit	Picklist	20	Default valid values: Day, Week, Month, and Year.
Total Asset Value	Currency	20	

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Valuation Date	Date	7	
Institution External ID	Text	30	Institution links to account.
Product External ID	Text	30	

### Related Topics

Portfolio Accounts	281
Field Type Guidelines for Importing Data	674
Importing Your Data	749

## Product Category Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing product category fields into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Campaign Recipients Field Name	Data Type	Maximum Length
Category Name	Text	100
Parent Category	Text	100
External Unique ID	Text	30
Parent Product Category External ID	Text	30
Description	Text	255

## Dealer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing dealer fields into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

**NOTE:** This section is specific to Siebel CRM On Demand Automotive Edition.

Default Dealer Field Name	Data Type	Maximum Length
Name	Text	100
Site	Text	50
Site	Text	50
Parent Dealer	Text	100
Status	Text	255
Parent Site	Text	50
Phone Number	Phone	40
E-mail	Text	50
URL	Text	100
Status	Text	30
Fax Number	Phone	40
Currency	Text	20
Stage	Text	30
Ranking	Number	16
External Unique ID	Text	30
Parent Dealer External ID	Text	30
Primary Owner Id	Id	15
Dealer Type	Text	30
Modified Timestamp	DateTime	32
Owner	Text	50

Default Dealer Field Name	Data Type	Maximum Length
Modified By	Text	255
Row Id	Id	15
Integration ID	Text	30
Custom Object 1	Text	50
Custom Object 2	Text	50
Custom Object 3	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Picklist 6	Text	30
Indexed Number	Number	16
Indexed Date	DateTime	32
Indexed Currency	Currency	25
Indexed Long Text	Text	255
Indexed Short Text 1	Text	40
Indexed Short Text 2	Text	40
Indexed Checkbox	Boolean	1

## Vehicle Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle fields into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

**NOTE:** This section is specific to Siebel CRM On Demand Automotive Edition.

Default Vehicle Field Name	Data Type	Maximum Length
VIN	Text	100
Make	Text	30
Model	Text	30
Year	Text	22
Trim	Text	30
Door	Text	30
Exterior Color	Text	30
External Unique ID	Text	30
Owner External ID	Text	30
Account External ID	Text	30
Product External ID	Text	30
Selling Dealer External ID	Text	30
Service Dealer External ID	Text	30
Product Type	Text	30
Selling Dealer	Text	100
Status	Text	255
Account	Text	100
Account Type	Text	255
Contact	Text	255
License Number	Text	30
License State	Text	10
License Expiry	Date	32
Transmission	Text	30
Account Site	Text	50

Default Vehicle Field Name	Data Type	Maximum Length
Status	Text	30
Location	Text	30
Used/New	Text	30
Engine	Text	30
MSRP	Currency	25
Dealer Invoice Price	Currency	25
Owned By	Text	30
Modified Timestamp	DateTime	32
Modified By	Text	255
Vehicle Currency	Text	30
Interior Color	Text	30
Warranty Type	Text	30
Warranty Start Date	Date	32
Warranty End Date	Date	32
Current Mileage	Number	16
Mileage Reading Date	Date	32
Product Name	Text	100
Type	Text	255
Body	Text	30
Description	Text	250
Owner	Text	50
Created Timestamp	DateTime	32
Row Id	Id	15
Integration ID	Text	30
Account Id	Id	15
Account Integration Id	Text	30

Default Vehicle Field Name	Data Type	Maximum Length
Custom Object 1	Text	50
Custom Object 2	Text	50
Custom Object 3	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Picklist 6	Text	30
Indexed Number	Number	16
Indexed Date	DateTime	32
Indexed Currency	Currency	25
Indexed Long Text	Text	255
Indexed Short Text 1	Text	40
Indexed Short Text 2	Text	40
Indexed Checkbox	Boolean	1
Product Category	Text	100
Part #	Text	50
Purchase Date	Date	32
Purchase Price	Currency	25
Quantity	Number	16
Ship Date	Date	32
Install Date	Date	32
Expiration Date	Date	32
Notify Date	Date	32
Contract	Text	30



## Custom Object Field: Import Preparation

The following table contains specific information about setting up your CSV file before importing custom object fields into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

**NOTE:** This information is valid for Custom Object 1, Custom Object 2 and Custom Object 3.

Default Custom Object Field Name	Data Type	Maximum Length
Name	Text	50
Account Location	Text	50
Description	Text	1999
External Unique ID	Text	30
Owner	Text	50
Currency	Text	20
Quick Search 1	Text	50
Quick Search 2	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Number	Number	16
Indexed Date	DateTime	32
Indexed Currency	Currency	25
Indexed Checkbox	Boolean	1
Type	Text	30
Account	Text	100
Campaign	Text	100

Default Custom Object Field Name	Data Type	Maximum Length
Contact	Text	255
Custom Object 1	Text	50
Custom Object 2	Text	50
Custom Object 3	Text	50
Dealer	Text	100
Fund	Text	50
Household	Text	50
Lead	Text	255
MedEd Event	Text	50
Opportunity	Text	100
Portfolio	Text	100
Product	Text	100
Service Request	Text	64
Solution	Text	100
Vehicle	Text	100
Account External ID	Text	30
Campaign External ID	Text	30
Contact External ID	Text	30
Custom Object 1 External ID	Text	30
Custom Object 2 External ID	Text	30
Custom Object 3 External ID	Text	30
Lead External ID	Text	30
Opportunity External ID	Text	30
Owner External ID	Text	30
Portfolio External ID	Text	30
Product External ID	Text	30
Service Request External ID	Text	30
Solution External ID	Text	30

## Campaign Recipient Fields: Import Preparation

The following table contains specific information about setting up your CSV file before campaign recipients into Siebel CRM On Demand. This information supersedes the guidelines for field data types, for further information, see [Field Type Guidelines for Importing Data](#) (on page 674). You must review the following import information before performing an import.

**NOTE:** The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names the user has changed.

Default Product Category Field Name	Data Type	Maximum Length
Delivery Status	Text	30
Response Status	Text	30
Campaign Name	Text	100
Contact	Text	255
Campaign External ID	Text	30
Contact External ID	Text	30
Description	Text	250

## About Countries and Address Mapping

The following table shows:

- Picklist values for the Country field in Siebel CRM On Demand

The picklist values for the Country field in Siebel CRM On Demand cannot be edited. To capture all the data when importing your files, make sure your countries match the permissible names exactly, including punctuation and capitalization. Otherwise, the information is not imported.

**NOTE:** Because the Country picklist values have a 30-character limit, some names that exceed that limit are truncated in the picklist.

- Mappings for addresses per country

When importing your data, you need to set up columns for each of the nine address fields that Siebel CRM On Demand uses. The following table shows how you want to map the address fields for each country to the appropriate fields within Siebel CRM On Demand. Mapping correctly ensures that you capture all the data in your files under the correct fields in the application.

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Pos t Code	Province	PO Box/Sortin g Code
USA	6	Number/Stree t	Address 2		City	US State	Zip		
Afghanistan	6	Address 1	Address 2		City		Post Code	Province	
Albania	6	Address 1	Address 2		City		Post Code	Province	
Algeria	5	Number/Stree t	Address 2		City		Post Code		
American Samoa	6	Address 1	Address 2		City		Post Code	Province	
Andorra	5	Number/Stree t	Address 2		City		Post Code		
Angola	4	Street/Numbe r	Address 2		City				
Anguilla	6	Address 1	Address 2		City		Post Code	Province	
Antarctica	6	Address 1	Address 2		City		Post Code	Province	
Antigua and Barbuda	4				City			Island	PO Box
Argentina	5	Number/Stree t	Address 2		City		Post Code		
Armenia	5	Street/Numbe r	Address 2		City		Post Code		
Aruba	5	Number/Stree t	Address 2	Floor	City				
Australia	6	Number/Stree t	Address 2		City		Zip	State	
Austria	5	Street/Numbe r	Address 2		City		Post Code		
Azerbaijan	5	Street/Numbe r	Address 2		City		Post Code		

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Bahamas	6	Address 1	Address 2		City		Island Code	Island	
Bahrain	5	Number/Street	Address 2		City		Post Code		
Bangladesh	5	Street/Number	Address 2		City		Post Code		
Barbados	6	Address 1	Address 2		City		Post Code	Province	
Belarus	6	Street/Number	Address 2		City		Post Code		Sorting Code
Belgium	6	Street/Number	Address 2		City		Post Code		Sorting Code
Belize	5	Number/Street	Address 2	Floor	City				
Benin	4				City		Boite Postale		Sorting Code
Bermuda	5	Number/Street	Address 2		City		Post Code		
Bhutan	6	Address 1	Address 2		City		Post Code	Province	
Bolivia	4	Street/Number	Address 2		City				
Bosnia and Herzegovina	5	Street/Number	Address 2		City		Post Code		
Botswana	3				City				PO Box
Bouvet Island	6	Address 1	Address 2		City		Post Code	Province	
Brazil	7	Street/Number	Address 2	Floor	City		Post Code	Province	
British Indian Ocean Territory	6	Address 1	Address 2		City		Post Code	Province	
Brunei Darussalam	5	Number/Street	Address 2		City		Post Code		

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Pos t Code	Province	PO Box/Sortin g Code
Bulgaria	5	Street/Numbe r	Address 2		City		Post Code		
Burkina Faso	4				City		Boite Postale		Sorting Code
Burundi	3				City				PO Box
Cambodia	6	Address 1	Address 2		City		Post Code	Province	
Cameroon	3				City				PO Box
Canada	6	Number/Stree t	Address 2		City		Post Code	Province	
Cape Verde	4	Street/Numbe r	Address 2		City				
Cayman Island	6	Address 1	Address 2		City		Post Code	Province	
Central African Republic	3				City				PO Box
Chad	3				City				PO Box
Chile	6	Street/Numbe r	Address 2	Floor	City		Post Code		
China	5	Number/Stree t	Address 2		City		Post Code		
Christmas Island	6	Address 1	Address 2		City		Post Code	Province	
Cocos (Keeling) Islands	6	Address 1	Address 2		City		Post Code	Province	
Colombia	7	Street/Numbe r	Address 2	Floor	City			Province	Sorting Code
Comoros	3				City				PO Box
Congo	3	Street/Numbe r			City				

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Congo, The Democratic Republic	4				City		Boite Postale		Sorting Code
Cook Islands	6	Address 1	Address 2		City		Post Code	Province	
Costa Rica	6	Street/Number	Address 2	Floor	City		Post Code		
Cote D'ivoire	6	Address 1	Address 2		City		Post Code	Province	
Croatia	4	Street/Number	Address 2		City		Post Code		
Cuba	4	Street/Number			City		Codiga Postal		
Cyprus	5	Number/Street	Address 2		City		Post Code		
Czech Republic	6	Street/Number	Address 2		City		Post Code		Sorting Code
Denmark	6	Street/Number	Address 2		City		Post Code		Sorting Code
Djibouti	3				City				PO Box
Dominica	6	Address 1	Address 2		City		Post Code	Province	
Dominican Republic	5	Number/Street	Address 2		City		Post Code		
East Timor	5	Street/Number	Address 2		City		Post Code		
Ecuador	5	Address 1		Floor	City		Post Code		
Egypt	6	Address 1		District	City		Post Code	Province	
El Salvador	5	Street/Number			City		Post Code	Province	
Equatorial Guinea	3				City				PO Box

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Pos t Code	Province	PO Box/Sortin g Code
Eritrea	3	Street/Numbe r			City				
Estonia	5	Street/Numbe r	Address 2		City		Post Code		
Ethiopia	3				City				PO Box
Falkland Islands (Malvinas)	3	Street/Numbe r			City				
Faroe Islands	6	Address 1	Address 2		City		Post Code	Province	
Fiji	5	Number/Stree t	Address 2	Floor	City				
Finland	6	Street/Numbe r	Address 2		City		Post Code		Sorting Code
France	5	Number/Stree t	Address 2		City		Post Code		
France, Metropolitan	6	Address 1	Address 2		City		Post Code	Province	
French Guiana	5	Number/Stree t	Address 2		City		Post Code		
French Polynesia	5	Number/Stree t	Address 2		City		Post Code		
French Southern Territories	5	Number/Stree t	Address 2		City		Post Code		
Gabon	3				City				PO Box
Gambia	3	Street/Numbe r			City				
Georgia	5	Number/Stree t	Address 2		City		Post Code		
Germany	5	Street/Numbe r	Address 2		City		Post Code		
Ghana	3				City				PO Box



Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Gibraltar	3	Street/Number			City				
Greece	5	Street/Number	Address 2		City		Post Code		
Greenland	5	Street/Number	Address 2		City		Post Code		
Grenada	6	Address 1	Address 2		City		Post Code	Province	
Guadeloupe	6	Address 1	Address 2		City		Post Code	Province	
Guam	6	Address 1	Address 2		City		Post Code	Province	
Guatemala	4	Street/Number			City		Codiga Postal		
Guinea	3				City				PO Box
Guinea-bissau	4	Street/Number			City		Codiga Postal		
Guyana	6	Address 1	Address 2		City		Post Code	Province	
Haiti	6	Street/Number	Address 2		City		Post Code		Sorting Code
Heard and Mc Donald Islands	6	Address 1	Address 2		City		Post Code	Province	
Holy See (Vatican City State)	6	Street/Number	Address 2		City		Post Code		Sorting Code
Honduras	7	Street/Number	Address 2	Floor	City		Post Code	Province	
Hong Kong	7	Number/Street	Address 2	District	City			Part of Territory	Address 4
Hungary	5	Street/Number	Address 2		City		Post Code		
Iceland	5	Street/Number	Address 2		City		Post Code		

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Pos t Code	Province	PO Box/Sortin g Code
India	5	Number/Street	Address 2		City		Post Code		
Indonesia	5	Street/Number	Address 2		City		Post Code		
Iran (Islamic Republic of)	5	Number/Street	Address 2		City		Post Code		
Iraq	6	Address 1	Address 2		City		Post Code	Province	
Ireland	6	Number/Street	Address 2	Address 3	City				County
Israel	5	Number/Street	Address 2		City		Post Code		
Italy	6	Street/Number	Address 2		City		Post Code	Province	
Jamaica	6	Number/Street	Address 2		City			Parish	Sorting Code
Japan	6	Chome	Ku		Chi/G un		Post Code	Prefecture	
Jordan	5	Number/Street	Address 2		City		Post Code		
Kazakhstan	4	Address 1			City		Post Code		
Kenya	4				City		Post Code		PO Box
Kirbati	4	Address 1			City			Island	
Korea	6	Address 1	Address 2		City		Post Code	Province	
Korea, Democratic People's Rep	6	Address 1	Address 2		City		Post Code	Province	
Kuwait	5	Street/Number	Address 2		City		Post Code		

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Kyrgyzstan	6	Street/Number	Address 2		City		Post Code		Sorting Code
Lao People's Democratic Republic	6	Address 1	Address 2		City		Post Code	Province	
Latvia	5	Street/Number			City		Post Code		Sorting Code
Lebanon	6	Address 1	Address 2		City		Post Code	Province	
Lesotho	3				City				PO Box
Liberia	6	Street/Number	Address 2		City		Post Code		Sorting Code
Libyan Arab Jamahiriya	6	Address 1	Address 2		City		Post Code	Province	
Liechtenstein	5	Street/Number	Address 2		City		Post Code		
Lithuania	4	Street/Number			City		Codigo Postal		
Luxembourg	5	Number/Street	Address 2		City		Post Code		
Macau	6	Address 1	Address 2		City		Post Code	Province	
Macedonia, The Former Yugoslav	6	Street/Number	Address 2		City		Post Code		Sorting Code
Madagascar	5	Street/Number	Address 2		City		Post Code		
Malawi	3				City				PO Box
Malaysia	5	Number/Street	Address 2		City		Post Code		
Maldives	5	Number/Street	Address 2		City		Post Code		
Mali	5	Number/Street	Address 2	Floor	City				

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Pos t Code	Province	PO Box/Sortin g Code
Malta	6	Number/Stree t	Address 2		City		Post Code	Island	
Marshall Islands	6	Number/Stree t	Address 2		City		Zip	State	
Martinique	5	Number/Stree t	Address 2		City		Post Code		
Mauritania	3				City				PO Box
Mauritius	3	Street/Numbe r			City				
Mayotte	5	Number/Stree t	Address 2		City		Post Code		
Mexico	8	Street/Numbe r	Address 2	Floor	City		Post Code	State	Colonia/Sec tion
Micronesia, Federated States of	6	Address 1	Address 2		City		Post Code	Province	
Moldova, Republic of	5	Street/Numbe r	Address 2		City		Post Code		
Monaco	5	Number/Stree t	Address 2		City		Post Code		
Mongolia	5	Street/Numbe r	Address 2		City		Post Code		
Montserrat	6	Address 1	Address 2		City		Post Code	Province	
Morocco	5	Number/Stree t	Address 2		City		Post Code		
Mozambique	4	Street/Numbe r			City		Codigo Postal		
Myanmar	5	Address 1			City		Post Code		Township
Namibia	3				City				PO Box
Nauru	3			District					PO Box

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Nepal	5	Street/Number	Address 2		City		Post Code		
Netherlands	5	Street/Number	Address 2		City		Post Code		
Netherlands Antilles	5	Address 1	Address 2		City			Island	
New Caledonia	5	Number/Street	Address 2		City		Post Code		
New Zealand	5	Number/Street	Address 2		City		Post Code		
Nicaragua	5	Street/Number	Address 2		City		Post Code		
Niger	3				City				PO Box
Nigeria	6	Address 1	Address 2		City		Post Code	Province	
Niue	3				City				PO Box
Norfolk Island	6	Number/Street	Address 2		City		Zip	State	
Northern Mariana Islands	6	Number/Street	Address 2		City		Zip	State	
Norway	6	Street/Number	Address 2		City		Post Code		Sorting Code
Oman	4						Post Code	Region	PO Box
Pakistan	6	Number/Street	Address 2	Address 3	City		Post Code		
Palau	6	Number/Street	Address 2		City		Zip	State	
Panama	5	Address 1			City			Province	Sorting Code
Papua New Guinea	3				City			Province	

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Pos t Code	Province	PO Box/Sortin g Code
Paraguay	4	Street/Numbe r	Address 2		City				
Peru	5	Street/Numbe r	Address 2		City				Sorting Code
Philippines	7	Street/Numbe r	Address 2	District	City		Post Code	Province	
Pitcairn	1								
Poland	4	Street/Numbe r			City		Codigo Postal		
Portugal	6	Street/Numbe r	Address 2	Floor	City		Post Code		
Puerto Rico	5	Address 1			City		Post Code		URB
Qatar	3				City				PO Box
Reunion	5	Number/Stree t	Address 2		City		Post Code		
Romania	5	Street/Numbe r	Address 2		City		Post Code		
Russian Federation	6	Street/Numbe r	Address 2		City		Post Code		Sorting Code
Rwanda	3				City				PO Box
Saint Kitts and Nevis	5	Address 1	Address 2		City			Island	
Saint Lucia	5	Number/Stree t	Address 2	Floor	City				
Saint Vincent and the Grenadin	5	Number/Stree t	Address 2	Floor	City				
Samoa	5	Number/Stree t	Address 2		City		Zip	State	
San Marino	6	Street/Numbe r	Address 2		City		Post Code		Sorting Code

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Sao Tome and Principe	5	Number/Street	Address 2	Floor	City				
Saudi Arabia	5	Number/Street	Address 2		City		Post Code		
Senegal	3	Street/Number			City				
Seychelles	4				City			Island	PO Box
Sierra Leone	5	Number/Street	Address 2	Floor	City				
Singapore	5	Street/Number	Address 2		City		Post Code		
Slovakia (Slovak Republic)	6	Street/Number	Address 2		City		Post Code		Sorting Code
Slovenia	5	Street/Number	Address 2		City		Post Code		
Solomon Islands	5				City		Island Code	Island	PO Box
Somalia	6	Address 1	Address 2		City		Post Code	Province	
South Africa	5	Number/Street	Address 2		City		Post Code		
South Georgia and the Sandwich Isles	6	Address 1	Address 2		City		Post Code	Province	
Spain	7	Street/Number	Address 2	Floor	City		Post Code	Province	
Sri Lanka	5	Number/Street	Address 2		City		Post Code		
St. Helena	6	Address 1	Address 2		City		Post Code	Province	
St. Pierre and Miquelon	5	Number/Street	Address 2		City		Post Code		

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Sudan	4				City		Post Code		PO Box
Suriname	3	Street/Number			City				
Svalbard and Jan Mayen Islands	6	Address 1	Address 2		City		Post Code	Province	
Swaziland	4				City		Post Code		PO Box
Sweden	5	Street/Number	Address 2		City		Post Code		
Switzerland	5	Street/Number	Address 2		City		Post Code		
Syrian Arab Republic	3	Street/Number			City				
Taiwan	5	Number/Street	Address 2		City		Post Code		
Tajikistan	5	Street/Number	Address 2		City		Post Code		
Tanzania, United Republic of	3				City				PO Box
Thailand	7	Address 1	Address 2	Address 3	City		Post Code	Province	
Togo	3				City				PO Box
Tokelau	6	Address 1	Address 2		City		Post Code	Province	
Tonga	4				City			Island	PO Box
Trinidad and Tobago	5	Number/Street	Address 2	Floor	City				
Tunisia	5	Street/Number	Address 2		City		Post Code		



Country (Uneditable Values)	No. of Fields	Address1	Address2	Address 3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Turkey	5	Street/Number	Address 2		City		Post Code		
Turkmenistan	4	Number/Street			City		Post Code		
Turks and Caicos Islands	6	Address 1	Address 2		City		Post Code	Province	
Tuvalu	4				City			Island	PO Box
Uganda	3				City				PO Box
Ukraine	5	Address 1	Address 2		City		Post Code		
United Arab Emirates	3							Emirate	PO Box
United Kingdom	7	Number/Street	Address 2		City		Post Code		County
United States Minor Outlying I	6	Address 1	Address 2		City		Post Code	Province	
Uruguay	5	Number/Street	Address 2		City		Post Code		
Uzbekistan	6	Address 1	Address 2		City		Post Code	Oblast	
Vanuatu	3				City				PO Box
Venezuela	6	Street/Number	Address 2		City		Post Code	Province	
Viet Nam	5	Number/Street	Address 2		City		Post Code		
Virgin Islands (British)	6	Address 1	Address 2		City		Post Code	Province	
Virgin Islands (U.S.)	6	Number/Street	Address 2		City		Zip	State	

Country (Uneditable Values)	No. of Fields	Address1	Address2	Address3	City	US State	Zip/Post Code	Province	PO Box/Sorting Code
Wallis and Futuna Islands	6	Address 1	Address 2		City		Post Code	Province	
Western Sahara	5	Number/Street	Address 2		City		Post Code		
Yemen	3	Street/Number			City				
Yugoslavia	6	Address 1	Address 2		City		Post Code	Province	
Zambia	5	Number/Street	Address 2		City		Post Code		
Zimbabwe	5	Number/Street	Address 2	Floor	City				
European Monetary Union	6	Address 1	Address 2		City		Post Code	Province	

## Valid State/Territory Abbreviations for USA

This table shows the picklist values for USA.

Abbreviations	Complete Names
<b>USA</b>	
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida

Abbreviations	Complete Names
GA	Georgia
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MI	Michigan
MN	Minnesota
MO	Missouri
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania

Abbreviations	Complete Names
PR	Puerto Rico
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming

### Valid Province/Territory Abbreviations for Canada

This table shows the official abbreviations for Canadian provinces (text fields).

Abbreviations	Complete Names
AB	Alberta
BC	British Columbia
MB	Manitoba
NB	New Brunswick
NF	Newfoundland and Labrador
NS	Nova Scotia
NT	Northwest Territories
NU	Nunavut
ON	Ontario
PE	Prince Edward Island
QC	Quebec
SK	Saskatchewan
YT	Yukon

## Importing Your Data

**Before you begin.** Prepare your CSV files and add any necessary fields or picklist values to the application. For more information, see [Preparing for Data Importing](#) (on page 670).

After you have prepared your data for importing, access the Import Assistant and perform the import.

**TIP:** Make sure that your import CSV file is set up correctly by doing a test import of five records. It is much easier to correct mistakes for five imported records than for the full number in your import file.

**NOTE:** Multi-select picklists cannot be imported.

### *To import records*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section, click the Import and Export Tools link.
- 3 In the Import Data section, select the record type you want to import from the drop down menu.
- 4 Click the Launch button.

This starts the Import Assistant.

- 5 For Step 1:

**NOTE:** The following options are available depending on the record you wish to import.

- a Select how you want the Import wizard to identify matching records.

The Import wizard uses an external unique ID, which is a unique external ID field that is imported from another system. The Import Wizard also uses CRM On Demand pre-defined fields. These are non-ID fields, such as Account Name and Location.

For information on how duplicate records are defined, see [About Record Duplicates and External IDs](#) (on page 755).

- b Select what you want the Import wizard to do if it finds a duplicate unique record identifier in CRM On Demand. Your choices are to not import duplicate records, to overwrite existing records or to create additional records.

**NOTE:** This option is not available in Task, Appointments, Notes, Account Teams, Contact Teams and Opportunity Contact Roles.

- c Select the action you want the Import Wizard to follow if the imported record's unique record identifier does not match an existing record in CRM On Demand.

**NOTE:** This option is not available in Task, Appointments and Notes. If you select Overwrite Records and Don't Create New Record in the previous option, this results in the record being updated.

- d Select how you want to handle picklist values in your CSV file that do not match the values in the application.

The Import wizard can either add the new value to the picklist or will not import the field value.

**NOTE:** This is not available when importing Notes or if the user's language is different than the company's default language. This is also not applicable to multi-select picklists. The multi-select picklists can only be imported if the value in the CSV file exists in the application.

- e Decide if the Import Wizard should create a new record for missing associations (related records) in your data file.

**NOTE:** This option is only available when importing Accounts or Contacts.

- f Select the date/time format used in the CSV file.

For more information, see [Field Type Guidelines for Importing Data](#) (on page 674).

- g Verify that the file encoding selection is Western.

**NOTE:** Do not change this setting unless you are certain another encoding method is used. The default, Western, applies to most encoding systems in Europe and North America.

- h Select the type of CSV delimiter used in your file: comma or semi-colon.

- i Select the CSV file whose data you want to import.

### 6 For Step 2:

- a Follow the instructions for validating your file, if necessary.

- b Select a field mapping file, if available.

Field mapping files (.map) contain the pairing of fields in your CSV file with existing Siebel CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.

## 7 For Step 3:

- a Map the fields in your file to Siebel CRM On Demand fields. At a minimum, you need to map all required fields to column headers in the CSV file.
- The Import Assistant lists the column headers from your import CSV file next to a drop-down list showing all the fields in that area in Siebel CRM On Demand, including custom fields you added.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

- If you selected a .map file, verify that the fields map correctly. Custom fields created since you ran the previous import might need to be mapped.

For information about external IDs, see [About Record Duplicates and External IDs](#) (on page 755).

**CAUTION:** If you have selected the wrong file to import, click Cancel to change selections. At this point, using the Back button does not clear the cache, so the import file you originally selected appears in the field mapping step.

**CAUTION:** External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

- 8 For Step 4, follow the onscreen instructions, if necessary.
- 9 For Step 5, click Finish.

### *To view the queue for your import requests*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Import and Export Queues section, click the Import Request Queue link.

The Import Request Queue page appears with information about your requests, including the estimated time of completion.

The following table describes the import status.

Status	Description
Queued	The import has not been processed yet.
In Progress	The import is being processed. <b>NOTE:</b> The request cannot be deleted in this state.
Completed	No errors during import.
Completed with errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every 20 seconds, or as set by a system process.



Import Record Information	Description
# Successfully Imported	The number of records that were imported without any problems.
# Partially Imported	The number that were imported but not all the fields for the record were imported.
# Not imported	The number of records that were not imported at all.

## Reviewing Import Results

You can track the progress of the import by reviewing the queue page within the application. Additionally, when the import is completed, you receive an email message outlining the specifics of the import. The email summarizes the import and contains a log file that lists the records and fields that were not imported.

You can then correct the data in your CSV file and import the information again. The second time, you should direct the system to overwrite existing records when it encounters duplicate records.

### *To view your import request queue*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Import and Export Tools section, click the Import and Export Tools link.
- 3 In the Import and Export Queues section, click the Import Request Queue link.

The Import Request Queue page appears, showing the time the import was completed or estimating the completion time.

### *To review the email message with import results*

- Go to your email application and open the email message from Siebel CRM On Demand.

The message lists any errors that occur on a record-by-record basis along with action you should take, if you want to capture the complete data for that record.

### Related Topics

Example of Import Results Email and Log File 754

## Example of Import Results Email and Log File

When your import request is completed, you receive an email message summarizing the import results:

Dear Mike,

Your import request completed at 3/30/2007 7:10:06 AM. Here is a summary of the results:

User: qa/mjones

Import Type: Account

Import File Name: Accounts.csv

Time Completed: 3/30/2007 7:10:06 AM

Total Records: 496

Successfully Imported: 495

Partially Imported: 1

Duplicate Records Ignored: 0

Failed: 0

For more details on your import, please review the log file. If you require further assistance, please refer to our online help or contact Siebel CRM On Demand Customer Care.

Thank you for using Siebel CRM On Demand,

Siebel CRM On Demand Customer Care

Attached to the email is a log file listing each error that occurs during the import process, such as the following:

Record Specific Error    EXTERNAL\_SYSTEM\_ID: 46552 No matching record is found for import field 'CURRENCY' with value 'INR'. The Siebel CRM On Demand field 'Account Currency' was not updated, but other field values were imported for this record.

For more information, see Import Errors and Warning Messages

## About Record Duplicates and External IDs

When you import records, you can choose to handle duplicate records in these ways:

- By not importing the duplicate ones
- By overwriting the existing ones

**NOTE:** This overwriting option is not available when you import Tasks, Appointments, and Notes. New records are always created for those record types.

- By creating additional records for the duplicates (Contacts and Leads only)

Your CSV file might have External IDs, which are generated by many software systems. Using External IDs makes importing from external systems easier, where a primary key/foreign key relationship is represented by storing IDs in the related file. If you have External ID codes for each of your records, you can use the Import Assistant to update fields in those records (except the External ID field). If you do not have External ID codes, you can only update those fields that are not used for duplicate checking.

### *To update records:*

- 1 Set up your import CSV file with a column for the External ID codes, or for all of the duplicate checking fields for the record type.
- 2 Make sure that the External ID codes or the duplicate checking field values are exactly the same as the values for the existing records. If you are using External ID codes, each one must be unique in the system for the update to work.
- 3 Include at least all required fields in your import CSV file.
- 4 Select the Overwrite Existing Records option in Step 1 of the Import Assistant.
- 5 Make sure that you map the External ID field or all of the duplicate checking fields in the Field Mapping step of the Import Assistant.
- 6 Complete all of the Import Assistant steps to import the data.

When you use the Import Assistant to update records, only fields that you map in the Field Mapping step are overwritten. Therefore, if you have fields that do not need to be updated, and they are not required for duplicate checking, you do not have to map those fields.

If External IDs exist and you have mapped them during the import process, the application uses them to determine if a record is a duplicate. When importing other record types, you can use those External IDs as references so that the associations are carried over to Siebel CRM On Demand.

For example, if you have an `account_id` column in your `account.csv` file, you want to map it to the "External Unique ID." When importing contacts, if your `contacts.csv` file contains a `contact_id` column (the unique ID for the contact) and an `account_id` column (a reference to the IDs in the `account.csv` file), you should map the `contact_id` to "External Unique ID" and `account_id` to "Account External ID." During the import process, the application checks the

account\_id field in each contact record to determine the existing account and link the account to the contact.

If no External IDs exist or you don't map External IDs in your file to the External ID fields in the application, the application determines duplicates by comparing certain fields. The following table lists the fields used for determining record duplicates:

Records of This Type	Are Duplicates If These Fields Match
User	<ul style="list-style-type: none"> <li>Email</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Accounts	<ul style="list-style-type: none"> <li>Account Name and Location</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Contacts	<ul style="list-style-type: none"> <li>First Name, Last Name, Work Phone #, and Email</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>Opportunity Name, Account Name and Primary Contact</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Campaign	<ul style="list-style-type: none"> <li>Source Code</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Leads	<ul style="list-style-type: none"> <li>First Name, Last Name, Company, Primary Phone #, and Email</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Service Request	<ul style="list-style-type: none"> <li>SR Number</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Solution	<ul style="list-style-type: none"> <li>Title</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Appointment & Task	<ul style="list-style-type: none"> <li>No duplicate checking (Always creates new records)</li> </ul>
Note	<ul style="list-style-type: none"> <li>No duplicate checking (Always creates new records)</li> </ul>

Records of This Type	Are Duplicates If These Fields Match
Contact Role	<ul style="list-style-type: none"> <li>Opportunity Name and Contact Full Name</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>
Products	<ul style="list-style-type: none"> <li>Product Name</li> <li>OR</li> <li>External ID (Created by another software system)</li> </ul>

**CAUTION:** When updating files, it is recommended that you map either the External ID or the other set of fields for determining duplicates; if you map both of them, you risk overwriting fields used for duplicate checking that you might not want to overwrite. For example, if you map the External ID, Account Name, and Location when updating account records, and a duplicate is found based on the External ID, the Account Name and Location overwrite the existing values in the database. If no duplicates are found based on the External ID, the system checks for duplicates based on Account Name and Location, and if found, overwrites the External ID in the database.

## Account Import and External ID Summary

When importing accounts, you specify how you want the application to handle duplicate records:

- Don't Import Duplicate Records**  
 If duplicates are found, the duplicate record is not imported.
- Overwrite Existing Records**  
 If duplicates are found, the existing record is updated. If more than one duplicate is found, then no records are inserted or updated.

After selecting the behavior, you have the option of mapping fields, including these two external IDs available with account imports:

- External Unique ID.** Refers to the external ID of the current record to be imported. The External Unique ID is directly involved in duplicate checking, as described in this section.
- Parent Account External ID.** References the external ID of the parent record for the current record.

The behavior surrounding each of these external IDs is independent of each other.

### Scenarios for External Unique IDs

#### Scenario A - External Unique ID is not mapped

Duplicate checking is based on Account Name and Location. If a duplicate is found, the behavior is determined by the selected duplicate checking option.

### Scenario B - External Unique ID is mapped

Import first tries to find a duplicate record using the External Unique ID.

- Scenario B1 - Single Duplicate External ID Found

Account Name and Location are checked for duplicates outside of the currently matched record, and if a duplicate is found, no records are updated or inserted.

If the duplicate checking option is set to Overwrite Existing Records, then the record is updated (including Account Name and Location).

If the duplicate checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- Scenario B2 - Multiple Duplicate External IDs Found

No Records are inserted or updated.

- Scenario B3 - No Duplicate External ID Found

Import now checks duplicates based on the Account Name and Location.

- Scenario B3a - No Duplicate Account Name and Location Found.  
Record is inserted.

- Scenario B3b - Single Duplicate Account Name and Location Found  
If the duplicate checking option is set to Overwrite Existing Records, the record is updated, *including the External Unique ID*. If the duplicate checking option is set to Don't Import Duplicate Records, no records are updated.

- Scenario B3c - Multiple Duplicate Account Name and Locations Found  
No records are inserted or updated.

### Scenario C - External Unique ID is not Mapped

The Account Name and Location are used to perform duplicate checking.

- Scenario C1 - Single Duplicate Account Name and Location found

If Duplicate Checking option is set to Overwrite Existing Records, then the record is updated.

If Duplicate Checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- Scenario C2 - Multiple Duplicate Account Name and Location found.

No records are updated or inserted.

- Scenario C3 - No Duplicate Account Name and Location found

Record is inserted.

### Scenarios for Parent Account External IDs

The Parent Account External ID is only used to set the associated Parent Account Record. It has no impact on duplicate checking or updates.

**Scenario A - Parent Account External ID is Mapped**

Import uses the Parent Account External ID *only* to determine the Parent Account.

- Scenario A1 - Multiple records match Parent Account External ID  
Parent Account is not set.
- Scenario A2 - Single Record matches Parent Account External ID  
Parent Account is set.
- Scenario A3 - No records match the Parent Account External ID  
Parent Account is not set.

**Scenario B - Parent Account External ID is not Mapped**

Import uses the Parent Account Name and Parent Account Location to determine the Parent Account.

- Scenario B1 - Multiple records match Parent Account Name and Parent Location.  
Parent Account is not set.
- Scenario B2 - Single Record matches Parent Account Name and Parent Location  
Parent Account is set.
- Scenario B3 - No records match the Parent Account Name and Parent Location  
Parent Account is not set.

## Exporting Your Company's Data

You can fully or partially export your company's data from Siebel CRM On Demand to an external file. The file is a zip file that contains individual CSV files for each record type you select to export.

**NOTE:** If your company uses an industry-specific edition of the application, those record types specific to your industry (such as Households, Vehicles, MedEd Events, and Funds) along with their linked activities and notes are excluded from the export.

Also, if you export records for *recurring* opportunity products, the application populates the Parent\_ID column for that row. For non-recurring records, the Parent\_ID cell is empty.

**Before you begin.** To perform this procedure, your role must include the Administration Export privilege.

### *To export your company's data*

**NOTE:** There is a limit to the number of exports (both full and partial) that can be done on a weekly basis. For details, contact Customer Care.

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section of the Admin Homepage, click the Import and Export Tools link .

- 3 On the Import and Export Tools page, click the Export Data link.  
This starts the Data Export Assistant.
- 4 For Step 1:
  - a Do one of the following:
    - If you wish to perform a full export, select the Export All Record Types radio button.
    - If you wish to perform a partial export, select the Export Selected Record Types radio button and the record types you wish to export.
  - b Click Next.Each record type is exported to a separate CSV file within the zip file.
- 5 For Step 2:
  - a Select the time zone used in the exported CSV file.
  - b Select the date/time format used in the exported CSV file.
  - c Select the type of CSV delimiter used in your file: comma or semi-colon.
  - d Select the filter criteria to limit the data in your export.  
**NOTE:** The first time you export your data, you might not want to filter on dates. After that, however, consider setting up incremental exports by filtering the data on dates since the previous export.
  - e Click Next.
- 6 For Step 3, follow the onscreen instructions to finish the export process.

### *To view the queue for your export requests*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Import and Export Queues section, click the Import Request Queue link.  
The Import Request Queue page appears with information about your requests, including the estimated time of completion.

The following table describes the import status.

Status	Description
Queued	The export has not been processed yet.



Status	Description
In Progress	The export is being processed. <b>NOTE: The request cannot be deleted in this state.</b>
Completed	No errors during export.
Completed with errors	The export completed but there were some errors with some of the records.
Failed	The export completed but none of the records were imported.
Error	The export did not complete because an error occurred.

The following table describes the export record information.

Import Record Information	Description
Submitted	Time and date when the export was performed.
Completed	Time and date when the export was finished.
# Exported	The number of records that were exported.
# Completed Objects	The number of objects that were successfully exported without any problems.

## Reviewing Export Results

Your exported file appears in the completed request section within the application. You can also track the progress of the export by reviewing the same page.

### *To view your export results or queue*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 On the Admin Homepage, click the Import and Export Tools link.
- 3 On the Import and Export Tools page, click the Export Request Queue link.  
The Export Request Queue page appears, showing the time the export was completed or estimating the completion time.
- 4 In the Completed Requests section, click the Export Type or Record Type link to open the Export Request Details page.

5 Then you can:

- Click Download to open or save the zip file. The zip file consists of an export summary text file and CSV files for each type of record you exported.
- Click Delete to delete the file.

## About Data Storage Limits

The amount of data your company can store in the Siebel CRM On Demand database depends on the number of licenses that your company has subscribed to. By default, you have 10 megabytes (MB) of storage per license. This is equivalent to approximately 5,000 records per license.

For example, a company with 15 licenses has 150 MB of storage (approximately 75,000 records).

To purchase additional storage, contact your Siebel CRM On Demand sales representative.

If you exceed your storage limit, you receive an error message. To continue adding records at that time, you must do one of the following:

- Purchase more storage
- Delete some records

## Batch Delete Queue Page

The Batch Delete Queue page displays all the active and completed delete record requests submitted by your company. From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps
Cancel an active request	When you delete the list of records from the record Lists page, you receive a confirmation email stating that the batch delete request has loaded successfully on the batch delete queue page. You can click the Cancel link to cancel the request until the Proceed link appears beside the request.
Proceed the active request	Click the Proceed link next to the request to finalize the batch delete request. You receive a confirmation email stating that the batch delete request has completed successfully and that the list of records is deleted.

To Do This	Follow These Steps
Display the number of records	In the Number of Records Displayed drop-down list, select a number of requests to see at one time.
Delete the processed request	Click the Delete button to delete the batch delete request from the Processed Requests queue.
Log the processed request	Click the Log button to save the batch delete request as a log file.

## Batch Assign Book Queue Page

The Batch Assign Book Queue page displays all the active and completed book assignment requests submitted by your company. From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps
Cancel	Click the Cancel link next to the request. You can cancel a request until its status changes to 'In Progress'.
Display details of a request	Drill down on the list name for the request. On the request Detail page, you can view the request properties and request parameters.
Show more or fewer requests	In the Number of Records Displayed drop-down list, select the number of requests to see at one time.
Delete the processed request	Click the Delete link to delete the request from the Processed Requests queue.
Log	Click the Log link to save the request as a log file.

When the request has completed, you receive an email notification.

For information on creating batch assignment requests, see [Assigning Records to Books](#) (on page 630).

## About Integration Events

An *integration event* is a mechanism for triggering external processes based on specific changes (create, update, delete, associate, dissociate) to the records in the Siebel CRM On Demand application. Integration events contain information about the data that was changed by the user. This information is stored in a queue as an XML file, which can be used to transfer the details of events in Siebel CRM On Demand to external applications.

### About Setting Up Integration Event Administration

To enable the integration event functionality in Siebel CRM On Demand, your application must be configured by Customer Care and by your company administrator. Contact Customer Care to request support for Integration Event Administration and to specify the size of the Integration Queue you require.

When Customer Care has set up the integration event functionality, the Integration Event Administration link is visible in the Data Management Tools section of the Admin Homepage, and the maximum size of the integration event queue is displayed on your Company Profile page. Also, the Administrator user role has the Manage Integration Event Queue privilege enabled.

For more information about viewing your company profile, see [Setting Up Your Company Profile and Global Defaults](#) (on page 529). For more information about user roles, see [Adding Roles](#) (on page 608).

### About Creating, Storing, and Transferring Integration Events

To trigger the creation of integration events, you must create workflow rules with Create Integration Event actions. For each such action, you can specify which fields on a record are to be tracked. When the value changes in a tracked field, the change is recorded in an integration event. For more information about workflow rules, see [About Workflow Rules](#) (on page 655).

Integration events are stored in a queue, the maximum size of which is specified in your company profile. When the queue is full, any new integration events are not stored. When the number of integration events in the queue is below the maximum, queuing resumes. On the Integration Event Settings page, you can delete integration events from the queue. You can also configure CRM On Demand to send a warning email to a specified address when the queue is full, or when the number of integration events in the queue exceeds a number that you specify.

You can transfer integration events to external applications by using the integration event Web service. A Web Services Description Language (WSDL) file is available for integration events. For more information about the integration event Web service, see [Web Services Integration](#) (on page 777) and the *Siebel Web Services On Demand Guide*.

- For a step-by-step procedure to manage the integration event queue, see [Managing Integration Event Settings](#) (on page 765).
- For a step-by-step procedure to create workflow rules that trigger integration events, see [Creating Workflow Rules](#) (on page 661).

## Managing Integration Event Settings

**Before you begin:** Integration Event Administration must be set up for your company, as described in [About Integration Events](#) (on page 764). When Integration Event Administration is set up, the maximum number of integration events allowed in the queue is configured as part of your company profile. To perform the procedures described here, you must have the Manage Integration Event Queue privilege in your user role.

### *To manage integration event settings*

- 1 In the upper-right corner of any page, click the Admin global link.
- 2 In the Data Management Tools section, click the Integration Event Administration link.
- 3 In the Integration Event Settings page, click the Integration Event Settings link.
- 4 On the Integration Event Settings page, you can perform the following tasks:
  - To delete all transactions in the queue, select the When I click Save, Clear All Transactions check box, and then click Save to delete the transactions.
  - To delete older transactions, click on the calendar icon and select a date in the When I Click Save, Clear Transactions Older Than field. Click Save to delete the transactions.
  - To configure the system to send a warning email when the queue is full or when the queue reaches a certain size, enter the email address, and (optionally) specify the size that the queue is allowed to reach before the warning email is sent. Click Save to save the email configuration.

## Content Management

Companies often want to keep track of the products in which their customers express interest and subsequently purchase. To help your company's employees track product information, you can set up a product catalog. Setting up the product catalog consists of grouping products under categories (if required) and then setting up the products under each category. Products include recurring or one-time products, services, and training options.

The following sections illustrate ways in which tracking of products is useful in Siebel CRM On Demand:

### **Opportunities**

A sales representative working on a sales opportunity can create an opportunity record to track the details of a customer's interests, including the potential revenue for the deal. A customer might be interested in several products and might consider purchasing a service contract as well. The sales representative can scroll down to the Products section of the opportunity record to link the product records for each of the items that the customer might buy. For the service contract, billed monthly, the sales representative can also record

recurring revenue information. In this way, the opportunity record gives complete information about a potential deal, and allows your company to:

- Track the products belonging to each opportunity
- Calculate revenue streams generated over time based on those products (recurring and non-recurring products)

### Assets

Both sales and service professionals find it helpful to know which of your company's products and services a customer has already purchased. In Siebel CRM On Demand, purchased products, or assets, can be tracked by linking product records to a customer's account or contact record.

### Forecasts

A forecast is a periodic snapshot of sales performance compiled from individual opportunity or product records. An advantage of linking products to opportunity, account, or contact records is that a company can then determine whether to generate forecasts based on product and recurring revenue.

If your company bases its forecasting on product revenue rather than opportunity revenue, your employees can specify which products should be used for the forecast totals.

Click a topic to see step-by-step instructions for the procedures pertaining to Content Management:

- [Setting Up Product Categories](#) (on page 766)
- [Setting Up Company Products](#) (on page 767)
- [Managing Your Company's Attachments](#) (on page 769)
- [Setting Up Assessment Scripts](#) (on page 770)
- [Setting Up Report Folders](#) (on page 364)

## Setting Up Product Categories

If your company's product list is long, it is a good idea to organize products in logical groupings, each with a name that is meaningful at your company. These groupings are called product categories. Categories help you search for a product or set of products because they allow you to sort the list to quickly find what you need. The product categories also allow your employees to quickly identify the correct product to link to their opportunities. For example, an office equipment company might set up these categories: Copiers, Fax Machines, Service, and Supplies.

You can have as many categories and subcategories (children) as you want.

**Before you begin:**

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If your product categories have not been defined at your company, determine the categories and subcategories before setting up the information in Siebel CRM On Demand. When entering the information, start from the top parent categories and then add the children categories.

***To set up your product categories***

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Content Management section, click the Content Management link.
- 3 Click the Product Categories link.
- 4 On the Product Categories List page, do one of the following:
  - To add a category, click New.
  - To update category information, click Edit for the appropriate record.

**NOTE:** To limit the records displayed on this page (and make it easier to find the existing category), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.
  - To add a child category to an existing category, click the link in the Category Name column, and then click New in the Child Categories section.
- 5 On the Category Edit page, enter the required information. The Category Name character limit is 100.
- 6 Save the record.

## Setting Up Company Products

**Before you begin:**

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If you are grouping products under categories, set up the categories before you define your products.

To allow employees to link products to opportunities, you need to set up your product inventory. When defining the products, you want to mark the ones as Orderable to make them available to your employees.

### To add products

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Content Management section, click the Content Management link.
- 3 In the Product Catalog section, click the Products link.
- 4 On the Product List page, do one of the following:
  - To add a product, click New.
  - To update product information, click Edit for the required record.

**NOTE:** To limit the records displayed on this page (and make it easier to find the existing product), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.

- 5 On the Product Edit page, complete the information.

**NOTE:** To make the product available to employees (so they can link it to their opportunities), make sure the Orderable check box is selected.

**TIP:** You cannot delete products. Instead, you need to make the product inactive by clearing the Orderable check box. This removes the product from the list of products that your employees can select.

The following table describes field information for products. An administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
<b>Key Product Information</b>	
Product Category	Specific to Siebel CRM On Demand Life Science Edition and Siebel CRM On Demand Financial Services Edition.
Class	Grouping of products to which the product belongs. Specific to Siebel CRM On Demand Life Science Edition.
Price Type	Specific to Siebel CRM On Demand Life Science Edition.
Parent Product	Specific to Siebel CRM On Demand Life Science Edition.
Product Type	Specific to Siebel CRM On Demand Life Science Edition and Automotive Edition. If you are defining an Automotive product, the Product Type field should be set to Vehicle.
Therapeutic Class	Specific to Siebel CRM On Demand Life Science Edition.
Part #	Number carried over with the product definition. Read-only.
Orderable	Select this field to make the product available to your employees. If you do not select Orderable, the product does not show up in the product list.



Field	Description
Type	Type carried over with the product definition. Read-only.
Sub Type	Specific to Siebel CRM On Demand Life Science Edition.
Status	Status carried over with the product definition. Read-only.
Revision	Specific to Siebel CRM On Demand Life Science Edition.
Serialized	Specific to Siebel CRM On Demand Life Science Edition.
Lot Number Tracking	Specific to Siebel CRM On Demand Life Science Edition.
Controlled	Indicator that the product is controlled. Specific to Siebel CRM On Demand Life Science Edition.
<b>Additional Information</b>	
Description	Additional information about the product. Limit of 2,000 characters.

- 6 Save the record.

## Managing Your Company's Attachments

**Before you begin.** To perform the procedures for managing attachments, your role must include the Manage Attachments privilege.

You can review all attachments for all records at your company. This will let you determine:

- Which file attachments are taking up large amounts of storage space
- Which files have been attached more than once

If this is the case, consider placing the attachment on a common shared location and directing users to replace attachments with the path to those files.

- Which users need to be reminded of the storage issues for large attachments

### *To review all attachments at your company*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 In the Content Management section, click the Content Management link.
- 3 In the Manage Attachments section, click the Manage Attachments link.
- 4 Do any of the following:
  - To view the attachment, click View in the row. This opens the file or takes you to the URL address.

- To delete the attachment, click Del in the row. The deleted file or URL is moved to the Deleted Items page and is permanently removed from the database after 30 days.

To replace the file or URL with a different one, click Replace. On the Edit page, enter the required information and save the record.

For complete instructions, see [Attaching Files and URLs to Records](#) (on page 74).

- To limit the attachment records displayed in the list, click the drop-down menu and change the selection.

The drop-down list contains standard lists distributed with the application.

## Setting Up Assessment Scripts

You can set up assessment scripts to help users to follow consistent processes when collecting data and making decisions. The assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, and so on. The assessment responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

With Oracle's Siebel CRM On Demand, you can set up assessment scripts that allow your company to:

- Automate the qualification of leads.
- Assess opportunities (by enforcing a sales methodology at your company).
- Conduct customer satisfaction surveys for contact and service request records.
- Use call scripts for service request records.

To find out more about assessment scripts, or to see step-by-step instructions for creating assessment scripts, see the following:

- [About Assessment Scripts](#) (on page 770)
- [Creating Assessment Scripts](#) (on page 774)

## About Assessment Scripts

An *assessment script* is a series of questions that helps users to collect customer data. Assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, and so on.

You can score customer answers, assign different weights to questions, and set thresholds for establishing decisions. In addition, you can map fields used during the assessment to the parent record and, later, run reports and analyses, based on those fields.

## How Are Assessment Scripts Used?

The process of using an assessment script is as follows:

- 1 The user launches an assessment script from a record detail page. The appropriate assessment scripts (determined by specified record field values) are listed on the record detail page. The user can also search for other assessment scripts, if necessary.
- 2 Working through the assessment questions, the user gathers critical customer information, such as details about the quality of a sales lead, and selects the correct response for each question from a drop-down list of choices.
- 3 Based on the responses, a score is automatically calculated, and the record is updated. For example, a lead is classified as qualified or rejected.
- 4 The answers to the questions are mapped as field values in the record, so that the answers are easily accessible, and available for reporting.
- 5 The completed assessments are stored and can be accessed in a related records section of the parent record.

## Which Type of Assessment Script Should You Create?

You can set up five different types of assessment scripts. Each script type is suitable for a specific task. Use the script types as follows:

- **Contact Script:** Use this type to conduct customer satisfaction surveys with individual contacts.
- **Lead Qualification:** Use this type to help sales representatives to identify the qualified leads. Using a script for this task reduces the need for training and enforces consistent lead qualification.
- **Opportunity Assessment:** Use this type to embed sales methodologies, and help sales representatives to assess the opportunities, so that they can adjust their sales strategies as they work on deals.
- **Service Request-Script:** Use this type to help service representatives to assess service requests; for example, to determine the priority or the escalation path for the request. Using a script for this task reduces the need for training and enforces consistent customer service.
- **Service Request-Survey:** Use this type to administer customer satisfaction surveys (that are linked to a specific service event.)

Each type of assessment is linked to a corresponding record type: Contact, Lead, Opportunity, or Service Request. If necessary, you can create multiple assessments of each type, and present the appropriate script to the user, based on the specified record criteria.

## Process of Creating Assessment Scripts

You must complete several tasks to set up an assessment script.

### 1 Customize the assessment script filters.

The filters allow you to define the criteria used to identify the appropriate assessment for a task, based on the specified record field values.

For example, a lead qualification assessment script might be set up with these filters:

- Account Tier = Gold
- Segment = Large
- Region = West

Then, when a user launches an assessment script from a lead record with the corresponding values, the correct lead qualification script is listed.

All assessment script types use the same four filter fields, each with a defined picklist of values. To customize the filters, you must:

- a Enter the filter field display names and picklist values for every record type for which you want to create an assessment script.
- b Add the filter fields to the page layouts for every record type for which you want to create an assessment script.

### 2 Create the assessment script and enter the script details:

- a Enter a name and assessment type.
- b Set the assessment category values.
- c Define the threshold score and outcomes.
- d Map the outcome and score to record fields.
- e Check the Active check box to activate the assessment.

### 3 Add criteria (questions) to the script.

For each question in the script:

- a Enter the question text.
- b Give each question a relative weight. The sum of all the criteria weight values must be 100.
- c Map the question to a record field.

- 4 Add a list of potential answers for each question. The answers are presented to users in a drop-down list.

For each question:

- a Enter the answer text.
  - b Enter a numeric score, between 1 and 100, for each answer.
- 5 Give users access to the script.
    - a For each user role that needs to use assessment scripts, enable access to the Assessments record type. For more information on user roles, see [Adding Roles](#) (on page 608).
    - b For each record type for which you have created the assessment scripts (contacts, leads, opportunities, or service requests), add the appropriate assessment script section to the displayed information on the record detail page. For more information on customizing page layouts, see [Customizing Static Page Layouts](#) (on page 570).

For step-by-step instructions on customizing the assessment script filters (step 1 in the process) and creating assessment scripts (steps 2 through 4 in the process), see [Creating Assessment Scripts](#) (on page 774).

## Example of an Assessment Script

A typical script that a company administrator might want to set up is a Lead Qualification script, which is used to determine whether a lead is to be qualified or rejected.

The following table shows the example values that might be used for such a script.

Script Field	Example Value
Type	Lead Qualification
Threshold Score	50
Outcome Value If Threshold Met	Qualified
Outcome Value If Threshold Not Met	Disqualified
Field to Map Outcome Value To	Description

**CAUTION:** If a Lead Qualification script attempts to set the Status field on a lead to Qualified, it will not be able to do so unless the Rating and Sales Person fields on the lead are filled in. If these fields are not filled in, an error message is displayed, and the script assumes the lead has failed to meet the threshold. The script then sets the Status field according to the results defined on the script for failing to meet the threshold.

Some examples of criteria for the Lead Qualification script are shown in the following table.

Criteria	Weight
What is the current state of your budget?	50
What is driving the timeline for this project?	25
When is it planned to make a decision?	25

Examples of answers and scores for the question "What is the current state of your budget?" are shown in the following table.

Answer	Score
Budget Approved	100
Budget Rejected	0

The score for each criterion is calculated by multiplying the weight of the criterion by the score for the answer, where the weight is a percentage. In this example, if a user chooses the answer Budget Approved, the score for the question is calculated as follows:

$$(0.5 * 100) = 50$$

The total score for the script is the sum of the scores for all the criteria. If the final outcome of the script meets or exceeds the threshold defined in the script, the value of the Description field on the Lead Detail page is set to Qualified. If the score falls below the threshold, the value of the field is set to Disqualified.

## Creating Assessment Scripts

To customize assessment script filters and create an assessment script, follow the steps in this topic.

### Before you begin:

- To perform this procedure, your user role must include the Administer Assessments privilege.
- If necessary, customize the picklist values and fields you want to use as part of the assessment criteria. For example, you can add custom fields to display information collected during the customer interview. When you set up the script, you can map the answers to those custom fields.

Be sure to add any new fields to the page layout for that record. For instructions, see [Customizing Static Page Layouts](#) (on page 570).

### *To customize assessment script filters (optional)*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Application Customization link.

- 3 Under Record Type Setup, click Assessment.
- 4 Click Assessment Field Setup.
- 5 Click Edit and edit the Display Name column for each of Filter 1, 2, 3, and 4.
- 6 For each field, click Edit Picklist and set up the values for the picklist.  
**TIP:** Keep the default <No Values> value at the top of the picklist options, unless you want to force your employees to select something from the picklist.
- 7 Save the record.
- 8 To relabel these fields in the record pages that your employees use, go to the Field Setup section and select the record types you are running assessment scripts with: Contact Fields, Lead Fields, or Service Request Fields.  
**NOTE:** The same picklist values you set up for Assessment Fields are displayed in these other records. However, you can customize the display name for these fields for each record type.

#### *To create an assessment script*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Content Management link.
- 3 Click the Assessment Scripts link.
- 4 On the Assessment List page, click New Assessment.
- 5 On the Assessment Edit page, complete the information.

The following table describes field information for assessments. An administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Name	Limit of 50 characters.  Use a descriptive name that includes the purpose of the script. If your company employees use various languages, include the language in the script name.
Type	Determines the record type the script is linked to. Default values are Contact Script, Lead Qualification, Opportunity Assessment, Service Request - Script, and Service Request - Survey.
Active	Only scripts that are active can be run.
Filter 1, 2, 3, 4	Displays the label that you set up for the assessment category.

Field	Description
Threshold Score (1-100)	Used to calculate the outcome of the scripts. If the score of the script is equal to or higher than the threshold, the outcome is met.
Field to Map Score To	Determines the field to display the score in the parent record.
Outcome Value If Threshold Met	Determines the value to display if the outcome is met. For example, if the lead meets the criteria for qualification, this field can display <i>Qualified</i> .
Outcome Value If Threshold Not Met	Determines the value to display if the threshold is not met. For example, if the lead does not meet the criteria for qualification, this field can display <i>Rejected</i> .
Field to Map Outcome Value To	Determines the field to display the outcome in the parent record when the script is completed, if you want this to occur.

**NOTE:** For a script to run, it must be active and contain questions and answers.

- 6 Click Save.
- 7 On the Assessment Detail Page, in the Criteria section, click New or Edit.
- 8 On the Criteria page, complete the information:

Field	Description
Criteria Name	Enter a short, descriptive name that users will recognize.
Question	Enter a question of up to 50 characters.
Weight	Enter a percentage. The sum of the weights for all questions must equal 100.
Answer Map to Field	If you want to track the answers to this question, map this to a field in the parent record. Mapping answers back to the parent record makes the values available in integration, reporting, and lists.

- 9 On the Assessment Detail Page, click each criterion name and then click the New or Edit button in the Answers section.
- 10 On each Answers page, complete the information:

Field	Description
Order	Determines the sequence of the options.
Answer	Enter a valid answer for the user to select for the question. Limit is 30 characters.



Field	Description
Score	The score for the selected answer is multiplied by the weight of the associated question to determine the total question/answer score.

**11** Save the script.

**TIP:** Be sure each role has a page layout that includes the new fields you added for assessment.

## Web Services Integration

Siebel CRM On Demand allows you to:

- Access and change your Siebel CRM On Demand data from a Web services-enabled application
- Create your own applications that integrate with Siebel CRM On Demand

You can:

- Download Web Services Description Language (WSDL) files to help you develop applications that access Siebel CRM On Demand using the Web services interface, see [Downloading WSDL and Schema Files](#) (on page 777) .
- Download WSDL and Schema files for using the methods of the Integration Events Web service to access the integration events queue, and track changes for particular record types. You can also download Schema files to track custom and renamed fields for the supported record types.
- View a summary of Web services used by your company, see [Reviewing Web Services Utilization](#) (on page 779).

## Downloading WSDL and Schema Files

From the Web Services Administration page you can:

- Download WSDL files for Web services
- Download Schema files
- Download the Web Services documentation

To download a WSDL or Schema file, select an item in the WSDL Object list, and click the appropriate button as described in the following sections. The items displayed in the WSDL Object list depend on the record types that are set up for your company.

To download the Web services documentation, click Download Documentation in the title bar. For more information about Web services, contact Customer Care.

## Downloading WSDL Files

You can download Web Services Description Language (WSDL) files for each record type. To download the WSDL for a record type, select the record type from the WSDL Object list and click one of the following buttons:

- Download Custom WSDL.
- Download Generic WSDL.

A page containing the WSDL is displayed, and you can save this file to your computer.

Depending on whether you select Download Custom WSDL, or Download Generic WSDL, custom fields are displayed differently in the WSDL. For Custom WSDL, the XML tags for the custom fields are based on the Integration tags from Field Setup, see [Setting Up Custom Field Integration Tags](#) (on page 562). Custom WSDL allows you to generate WSDL specific to your company that uses your company's field naming conventions. For Generic WSDL, the custom fields are based on generic XML tags: CustomNumber0, CustomCurrency0, and so on. Using these placeholders, together with the Mapping Service allows applications to map to the field names that your company uses.

## Downloading Schema Files

The Integration Events Web service uses Schema (XSD) files in its WSDL, which you download in an integrationevent.zip file. The .zip file contains the WSDL file and the XSD schema files of all supported record types. However, if you create custom fields or rename fields for a record type, you cannot use the XSD files contained in the integrationevent.zip file for tracking these fields. Instead, you must download an XSD file using the Download Custom Schema button in the Web Services Administration page. For more information about the Integration Events Web service, see *Siebel Web Services On Demand Guide*.

To download the Schema for a record type, select the record type from the WSDL Object list, and click one of the following buttons:

- Download Custom Schema
- Download Generic Schema

A page containing the Schema is displayed, and you can save this file to your computer.

Depending on whether you select Download Custom Schema, or Download Generic Schema, custom fields are displayed differently in the Schema. For Custom Schema, the XML tags for the custom fields are based on the Integration tags from Field Setup. For Generic Schema, the custom fields are based on generic XML tags.

## Reviewing Web Services Utilization

From the Web Services Utilization Page, you can review a summary of the Web services used by your company. By default, the Web services are listed by session ID, and the Web Service name, operation, start time, end time, and user alias for the session are displayed. The following table describes what you can do from the Web Services Utilization page.

To do this	Follow these steps
Create a new list of Web Service requests	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Find a Web Service request	Select the required filter criteria in the drop-down lists next to Show results where.
Manage all the Web Service request lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Page through the list	Click the Previous or Next links.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> (on page 65).
Sort the Web service requests in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to see at one time.
View a subset of Web services operations	Click the drop-down list in the title bar and change the selection as required: <ul style="list-style-type: none"> <li>■ <b>All</b>. Displays a list of all Web services operations</li> <li>■ <b>All Operations Today</b>. Displays a list of all Web services operations for today</li> </ul>

### About Creating a Web Services List

The process for creating or refining a Web services list is similar to that described in [Creating and Refining Lists](#) (on page 59). However, the Web Service List pages do not have the Search In section that is provided on the corresponding pages for other record types.

The fields that you can use for filtering a Web services list, and which you can select for display in the search results are as follows:

Field	Comments
End Time	The end time of the Web service request.
Entry Type	Possible values are: Login, Logout, and Dispatch.  Every Web service call apart, from login and logout, is set to Dispatch for this field because the calls go through the Inbound Web service Dispatcher business service.
Input Message Size	The size of the input message.
Organization Id	The row ID of the company.
Output Message Size	The size of the input message.
Session ID	The session identifier of the Web service request.  This is actually the foreign key for the corresponding session in the login history table, and not the actual session ID used in the Web service request.
Start Time	The start time of the Web service request.
User Alias	The user alias of the user who executed the Web service request.
Web Service Name	The name of the Web service to which the request was made.
Web Service Space	The namespace used in the request.

## Managing Smart Calls

You can manage smart calls if your user role has the appropriate access level for the Smart Call record type (either Default or Owner access).

### *To manage smart calls*

- 1 In the upper right corner of any page, click the Admin global link.
- 2 Click the Smart Call Management link.

- 3 On the Manage Smart Call Templates page:
  - To review the smart call, click the link in the Subject column.
  - To delete the smart call, click Delete in the appropriate row.

- 4 On the Manage Smart Call Templates page, click the Menu button.

The following table describes the tasks that you can do from the Menu button on the Manage Smart Calls Templates Page.

To do this	Follow these steps
Batch Assign Book	On the Managing Smart Calls title bar, click Menu, and select Batch Assign Book. Complete the steps described in the <a href="#">Assigning Records to Books</a> (on page 630).
Export List	On the Solutions List title bar, click Menu, and select Export List. Complete the steps described in <a href="#">Exporting Records in Lists</a> (on page 66).
Refine List	On the Solutions List title bar, click Menu, and select Refine List. Complete the steps described in <a href="#">Creating and Refining Lists</a> (on page 59).
Save List	On the Managing Smart Calls title bar, click Menu, and select Save List. Complete the steps described in the Refine List: Smart Calls List page.
Show List Filter	On the Solutions List title bar, click Menu, and select Show List Filter. Complete the steps described in <a href="#">View List Page</a> (on page 65).
Manage Lists	On the Solutions List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in <a href="#">Manage Lists Page</a> (on page 64).
Create New Lists	On the Managing Smart Calls title bar, click Menu, and select Create New Lists. Complete the steps described in the New Smart Calls List page.

## Creating Expressions with Expression Builder

Click a topic to see information about Expression Builder and how to use it:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [About Expressions](#) (on page 785)
- [Data Types in Expression Builder](#) (on page 787)
- [Expression Builder Operators](#) (on page 790)
- [Expression Builder Functions](#) (on page 795)
- [Expression Builder Examples](#) (on page 836)

## About Expression Builder

Expression Builder is a tool for implementing business rules using Siebel Query Language expressions. An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Siebel CRM On Demand.

Expression Builder is used in the following areas in CRM On Demand:

- Advanced field management, in the following contexts:

- Configuring field validation properties on a field
- Specifying default field values

When defining field level validations and default field values, a company administrator can create flexible expressions to cover a variety of business rules. For more information on field validation and default values, see [About Field Management](#) (on page 553).

- Workflow rules, in the following contexts:

- Configuring workflow rule conditions
- Configuring Create Email Notification actions
- Configuring Update Values actions

From the Workflow pages, a company administrator can set up workflow rules that are evaluated when a record is updated, created, or deleted. Siebel Query Language expressions are used to define both the conditions on the rules, and the actions that are executed by the rules. For more information about workflow rules, see [About Workflow Rules](#) (on page 655).


**NOTE:** Expression Builder can verify the syntax of an expression, but it cannot evaluate or verify an expression for mathematical, logical, or semantic accuracy.

## Related Information


Click a topic to see more information about Expression Builder and how to use it:

- [Using Expression Builder](#) (on page 783)
- [About Expressions](#) (on page 785)
- [Data Types in Expression Builder](#) (on page 787)
- [Expression Builder Operators](#) (on page 790)
- [Expression Builder Functions](#) (on page 795)
- [Expression Builder Examples](#) (on page 836)

## Using Expression Builder

In Siebel CRM On Demand, you can create a Siebel Query Language expression wherever you see the *fx* icon  beside a text box. Clicking the icon opens the Expression Builder window.

### *To build an expression*

- 1 Click the *fx* icon  to open the Expression Builder window.
- 2 Select the fields and functions from the drop-down lists, or type in the Expression box.

When you select a field from the list, the field is pasted into the Expression box. For example, when you select *CloseDate* from the list of Opportunity fields, [*<CloseDate>*] is pasted into the Expression box.

**NOTE:** If your company administrator has renamed a field, the Fields picklist shows the new field name. However, the original field name (that is, the corresponding XML name) is pasted into the Expression box.

The brackets around the field name indicate that the value of the particular field will be evaluated and returned in its specific data type. See the following table for more information about selecting fields and field values.

- 3 Edit the expression by adding operators and literals as needed.

**NOTE:** If you want your expression to determine whether a picklist field has a certain value, do not type the value in the expression. For example, do not type [*<AccountType>*] = "Customer". Instead, select the picklist field from the drop-down list, and click the *Show Acceptable Values* link in the Expression Builder window. Select the value that you want to use in the expression from the values shown. The expression looks something like the following:

```
[<AccountType>]=LookupValue("ACCOUNT_TYPE", "Customer")
```

- 4 (Optional) Click *Check Syntax*, and then make any corrections.
- 5 Save your expression.

The following table describes the Expression Builder window.

Interface Element	Description
<i>record type</i> Fields	<p>Provides a context-specific picklist of the fields (from the context record type) that are allowed in an expression. If your company administrator has renamed some fields, the Fields picklist shows the new field names.</p> <p>Note the following points:</p> <ul style="list-style-type: none"> <li>■ If you are creating a workflow rule, or actions related to a workflow rule, the context record type is the record type specified in the definition of the workflow rule. For example, if you are creating the body of an email that is to be sent as an action on a workflow rule for a service request record, the context record type for Expression Builder is Service Request.</li> <li>■ In advanced field management, the context record type is the record type that is the parent of the field where the expression is being created. For example, when defining field validation on an opportunity field, the context record type for Expression Builder is Opportunity.</li> </ul>
Show Acceptable Values	<p>When you have selected a field from the Fields picklist, click Show Acceptable Values to display the acceptable values for that field.</p> <ul style="list-style-type: none"> <li>■ If the selected field is a picklist field, Show Acceptable Values displays all the options configured for that picklist.</li> </ul> <p>You can select only one option at a time. Selecting an option results in the definition of a Lookup function that can be used in an expression.</p> <ul style="list-style-type: none"> <li>■ If the selected field is not a picklist field, Show Acceptable Values displays a window that describes the acceptable values for a variety of data that the field can hold.</li> </ul>
Functions	<p>Provides a drop-down list of the special functions that are available to modify, extract, or process data within an expression. For a list of the available functions, see <a href="#">Expression Builder Functions</a> (on page 795).</p>
Expression	<p>A multiline editable text box that displays the expression.</p> <p>The text box is limited to 256 characters. Fields and functions that you select from the picklists appear in the expression box. You can also type expressions directly in the expression box.</p> <p>If your company administrator has renamed fields, the expression syntax shows the original field names. For custom fields, field names appear in the expression with integration tags affixed to the field names.</p>



Interface Element	Description
Syntax Guide	Displays the Creating Expressions with Expression Builder topic in Siebel CRM On Demand Online Help.
Sample Expressions	Displays the Expression Builder Examples topic in Siebel CRM On Demand Online Help.
Check Syntax	Validates the syntax of the expression that you created.
Save	Saves the expression.
Cancel	Closes the Expression Builder window without saving any changes.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [About Expressions](#) (on page 785)
- [Data Types in Expression Builder](#) (on page 787)
- [Expression Builder Operators](#) (on page 790)
- [Expression Builder Functions](#) (on page 795)
- [Expression Builder Examples](#) (on page 836)

## About Expressions

An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by CRM On Demand. This topic provides information about conditional expressions and validation expressions.

### Conditional Expressions

A conditional expression is an expression that, when evaluated by the application, always returns a Boolean value such as True or False. Note that Yes, No, Y, and N are not Boolean values.

An expression used in any of the following contexts must be a conditional expression:

- To specify a field validation rule
- To specify a condition in a workflow rule
- As the first parameter in an [IIf](#) (on page 805) function

## Validation Expressions

Validation expressions are used to ensure that the data entered in fields is valid. A validation expression must be a conditional expression.

**NOTE:** A validation expression for a field is evaluated when the record is created, and each time the field is updated by a user.

A validation expression is different from other types of expressions in that it can start with a conditional operator. For example, if Account Name is the field being validated by the expression, the expression can start with:

= ' Acme Hospi tal '

This expression, though not well formed, will pass a syntax check, because CRM On Demand inserts the name of the field being validated before the expression if it does not find a field name at the start of the expression. You can also enter the validation expression as follows:

[<AccountName>]= ' Acme Hospi tal '

where [<AccountName>] is the field being validated.

If the expression requires other fields to be evaluated in addition to the field being validated, it is standard practice for the first comparison in the expression to be performed on the field being validated.

Validation expressions are used only in the Field Validation text box in advanced field management in Siebel CRM On Demand.

## Validation Expression Examples

Example 1: A business process requires that the close date of an opportunity must be later than the created date of the opportunity.

To implement this process, create a validation expression for the Close Date field (in the Field Setup page for opportunities) as follows:

> [<CreatedDate>]

Alternatively, you can use the following example, but note that the field that is being evaluated (Close Date) must be the first field in the expression:

[<Cl oseDate>] > [<CreatedDate>]

For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 559).

Example 2: A business process requires that the revenue of an opportunity must be a nonzero value when the probability of the opportunity is 40% or greater.

The business rule indicates that the dependency is on both fields and can be restated as follows:

For an opportunity, revenue cannot be zero when the probability is greater than or equal to 40. Conversely, the probability cannot be greater than or equal to 40 if the revenue is zero.

A validation expression for a field is evaluated when the record is created, and each time the field is updated by a user. Because an update to either the Probability field or the Revenue

field can affect both fields, you must have validation rules on both the Probability field and the Revenue field to implement the business rule correctly. (For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 559).)

The steps required to implement this example are as follows:

- 1 Configure the following validation rule for the Probability field:

`< 40 OR ([<Probability>] >= 40 AND [<Revenue>] > 0)`

Note that you do not use the percentage sign (%).

- 2 Add a validation error message such as the following to the Probability field:

Revenue must be greater than 0 when the probability is greater than or equal to 40%.

- 3 Configure the following validation rule for the Revenue field:

`(> 0 AND [<Probability>] >= 40) OR [<Probability>] < 40`

- 4 Add a validation error message such as the following to the Revenue field:

Revenue must be greater than 0 when the probability is greater than or equal to 40%.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Data Types in Expression Builder

This topic describes the data types in Siebel CRM On Demand, and how they are used in Expression Builder.

### Data Types in Siebel CRM On Demand

The following table shows the data type returned when a Siebel CRM On Demand field is used in an expression. To get the value of a field, use the syntax [`<FieldName>`].

Siebel CRM On Demand Field Type	Return Type in Expressions
Integer	Integer
Picklist	String
Currency	Currency

Siebel CRM On Demand Field Type	Return Type in Expressions
ID	String
Text	String
Check box	Boolean. For example, you can use [<Active>] directly in places where conditions are expected. You can also use FieldValue('<Active>') = 'Y'.
Date	Date
Date Time	Date Time
Number	Number

**NOTE:** If the company administrator has renamed fields, the *record type* Fields list shows the new names, but the expression syntax shows the original names. For custom fields, the Integration Tag names that the company administrators can change are used in the expression syntax. The syntax is as follows:

[<CustomTag\_ITAG>] and FieldValue('<CustomTag\_ITAG>')

## Data Type Arithmetic

When a statement references more than one field value, and the fields have different data types, the order of the data types can affect the calculation. When an operator (other than the exponent operator) is applied to two operands of two different data types, the operand on the right side of the operator is converted to the data type of the operand on the left side before the operation is evaluated. For example, the following expression:

`PRE(' <CI oseDate>' ) + 30`

evaluates to 02/09/200730. Therefore, the following condition:

`[<CI oseDate>] > PRE(' <CI oseDate>' ) + 30`

is syntactically valid, but its meaning is invalid. The condition is correctly written as follows:

`[<CI oseDate>] - 30 > PRE(' <CI oseDate>' )`.

**NOTE:** When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

The following tables show the possible results of the various arithmetic operations, using the example values shown.

Field	Data Type	Example Value
Quantity	Integer	5
Item Price	Currency	2.25

Calculation	Result	
	Value	Data Type
[<Item Price>] + [<Quantity>]	7.25	Currency
[<Quantity>] + [<Item Price>]	7	Integer
[<Item Price>] - [<Quantity>]	(2.75) <b>NOTE:</b> For currency fields, parentheses indicate that the value is negative.	Currency
[<Quantity>] - [<Item Price>]	3	Integer
[<Item Price>] * [<Quantity>]	11.25	Currency
[<Quantity>] * [<Item Price>]	10	Integer
[<Item Price>] / [<Quantity>]	0.45	Currency
[<Quantity>] / [<Item Price>]	2.50	Currency

When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

In this example (where Quantity is an integer field, value 5, and Item Price is a currency field, value 2.25), if the operand on the right side of the operator was converted to the data type of the operand on the left side, the expected value of Quantity ^ Item Price would be 25, and the expected data type would be integer. However, the results are shown in the following table.

Calculation	Result	
	Value	Data Type
[<Item Price>] ^ [<Quantity>]	57.67	Currency
[<Quantity>] ^ [<Item Price>]	37.38	Currency

The negate (-) operator is also supported in Expression Builder. For example:

Calculation	Result	
	Value	Data Type
-1 * [<ItemPrice>]	(2.25)	Currency

If you convert a number to a string, the calculation does not work correctly. For example:

Calculation	Result		Description
	Value	Data Type	
1234 + abcd	1234	Number	The string "abcd" evaluates to the number 0 and is then added to 1234.
abcd + 1234	abcd1234	String	The number 1234 evaluates to the string "1234" and is appended to the string "abcd".

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Expression Builder Operators

This topic describes the operators that you can use in Expression Builder, and the order in which they are evaluated.

### Arithmetic Operators

The following table describes the purpose of each arithmetic operator and gives an example of how it is used.

Operator	Purpose	Example
+	Add	[<Record Number>] + 1
-	Subtract	[<Record Number>] - 1
-	Negate	[<Revenue>] < -100

Operator	Purpose	Example
*	Multiply	[<Subtotal>] * 0.0625
/	Divide	[<Total Items>] / [<Total Orders>]
^	Exponent	[<Grid Height>] ^ 2

## Logical Operators

The following truth table shows the possible results from the logical operators in Expression Builder.

Logical Operator	First Operand	Second Operand	Result
NOT	TRUE		FALSE
	FALSE		TRUE
	NULL		NULL
AND	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	FALSE
	FALSE	TRUE	FALSE
	TRUE	NULL	NULL
	FALSE	NULL	FALSE
	NULL	TRUE	NULL
	NULL	FALSE	FALSE
	NULL	NULL	NULL
OR	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	TRUE
	FALSE	TRUE	TRUE
	TRUE	NULL	TRUE

Logical Operator	First Operand	Second Operand	Result
	FALSE	NULL	NULL
	NULL	TRUE	TRUE
	NULL	FALSE	NULL
	NULL	NULL	NULL

## Comparison Operators

The following table describes the purpose of each comparison operator and gives an example of how it is used.

Operator	Purpose	Example
=	Tests that the first operand is equal to the second operand.	[<Last Name>] = "Smith"
< >	Tests that the first operand is not equal to the second operand.	[<Role>] < > "End-User"
>	Tests that the first operand is greater than the second operand.	[<Revenue>] > 5000
<	Tests that the first operand is less than the second operand.	[<Probability>] < .7
> =	Tests that first operand is greater than or equal to the second operand.	[<Revenue>] >= 5000
< =	Tests that the first operand is less than or equal to the second operand.	[<Probability>] <= .7
LIKE	Tests that the value of the first operand matches the specified string.	[<Last Name>] LIKE "Smith"  <b>TIP:</b> You can use the asterisk (*) and question mark (?) pattern matching special characters with the LIKE operator.



Operator	Purpose	Example
NOT LIKE	Tests that the value of the first operand does not match the specified string.	<p>[&lt;Last Name&gt;] NOT LIKE "Smith"</p> <p>or</p> <p>NOT ([&lt;Last Name&gt;] LIKE "Smith")</p> <p><b>NOTE:</b> The parentheses are required in the second example.</p> <p><b>TIP:</b> You can use the asterisk (*) and question mark (?) pattern matching special characters with the NOT LIKE operator.</p>
IS NULL	Tests that the operand is null.	[<Last Name>] IS NULL
IS NOT NULL	Tests that the operand is not null.	[<Last Name>] IS NOT NULL

## Pattern Matching Special Characters

The following table describes the pattern matching special characters. These special characters can be used with the LIKE and NOT LIKE comparison operators.

Character	Purpose	Example
*	Zero or more characters	<p>[&lt;Last Name&gt;] LIKE "Sm*" returns all records where the [&lt;Last Name&gt;] value starts with the characters <i>Sm</i>, as in <i>Smith</i>, <i>Smythe</i>, <i>Smart</i>, and so on.</p> <p>[&lt;Last Name&gt;] LIKE "*om*" returns all records where the [&lt;Last Name&gt;] field contains the characters <i>om</i>, as in <i>Thomas</i>, <i>Thompson</i>, <i>Tomlin</i>, and so on.</p>
?	One character	<p>[&lt;First Name&gt;] NOT LIKE "Da?" returns all records where the [&lt;First Name&gt;] value is three characters long and does not start with the letters <i>Da</i>. Records with <i>Ted</i>, <i>Tom</i>, and <i>Sam</i> are returned, but <i>Dax</i> and <i>Dan</i> are not.</p> <p>NOT ([&lt;First Name&gt;] LIKE "?o?") returns all records where the [&lt;First Name&gt;] value is three characters long and does not have as its middle character <i>o</i>. Records with <i>Ted</i> and <i>Sam</i> are returned, but <i>Tom</i> and <i>Bob</i> are not.</p>

## Concatenation Operator

The + (plus) operator is used in emails to concatenate field values and text.

## Precedence of Operators

Precedence is the order in which Siebel CRM On Demand applications evaluate the various operators within a single expression. The following rules apply:

- Operators with higher precedence are evaluated before operators with lower precedence.
- Operators with equal precedence are evaluated from left to right.
- Lower-level numbers indicate higher precedence.
- The use of parentheses affects the order of precedence within an expression. The expression within parentheses is evaluated before the expression outside the parentheses.

The levels of precedence are listed in the following table.

Level	Operator
1	( )
2	- (negation)
3	^ (exponentiation)
4	* (multiplication), / (division)
5	+ (addition), - (subtraction), NOT logical operator
6	AND logical operator
7	OR logical operator
8	=, <>, >, <, >=, <= comparison operators

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Expression Builder Functions

The following table lists the functions that you can use in Expression Builder. Click the name of a function to see more information about the function.

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
<a href="#">IfNull</a> (on page 804)	<a href="#">JulianDay</a> (on page 808)	<a href="#">FieldValue</a> (on page 799)	<a href="#">Alias</a> (on page 797)	<a href="#">ExcludeChannel</a> (on page 798)	<a href="#">LN</a> (on page 816)
<a href="#">IIf</a> (on page 805)	<a href="#">JulianMonth</a> (on page 809)	<a href="#">FindNoneOf</a> (on page 800)	<a href="#">Currency</a> (on page 797)	<a href="#">GetGroupId</a> (on page 803)	
	<a href="#">JulianQtr</a> (on page 810)	<a href="#">FindOneOf</a> (on page 801)	<a href="#">DivisionName</a> (on page 798)	<a href="#">GetParentId</a> (on page 803)	
	<a href="#">JulianWeek</a> (on page 811)	<a href="#">InStr</a> (on page 806)	<a href="#">FirstName</a> (on page 802)	<a href="#">LookupName</a> (on page 820)	
	<a href="#">JulianYear</a> (on page 811)	<a href="#">Left</a> (on page 814)	<a href="#">JobTitle</a> (on page 807)	<a href="#">LookupValue</a> (on page 821)	
	<a href="#">Timestamp</a> (on page 828)	<a href="#">Len</a> (on page 815)	<a href="#">Language</a> (on page 812)	<a href="#">PRE</a> (on page 824)	
	<a href="#">Today</a> (on page 831)	<a href="#">Mid</a> (on page 822)	<a href="#">LanguageName</a> (on page 813)	<a href="#">RowIdToRowNum</a> (on page 826)	
	<a href="#">UtcConvert</a> (on page 835)	<a href="#">Right</a> (on page 825)	<a href="#">LastName</a> (on page 813)	<a href="#">RowNum</a> (on page 827)	
		<a href="#">ToChar</a> (on page 829)	<a href="#">LocalCurrency</a> (on page 817)		
			<a href="#">Locale</a> (on page 817)		
			<a href="#">LocaleListSeparator</a> (on page 818)		
			<a href="#">LocaleName</a> (on page 818)		
			<a href="#">LoginId</a> (on page 819)		

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
			<a href="#">LoginName</a> (on page 819)		
			<a href="#">OrganizationName</a> (on page 824)		
			<a href="#">UserValue</a> (on page 831)		

Some of the functions listed in the drop-down list on the Functions field in Expression Builder are for internal use only. Do not use the following functions in your expressions:

- [IsManagerPosition](#)
- [Lookup](#)
- [LookupMessage](#)
- [LOVLanguage](#)
- [PositionId](#)
- [PositionName](#)

It is recommended that you use the [UserValue](#) (on page 831) function instead of the following functions:

- [Alias](#)
- [Currency](#)
- [DivisionName](#)
- [FirstName](#)
- [JobTitle](#)
- [Language](#)
- [LanguageName](#)
- [LastName](#)
- [LocalCurrency](#)
- [LocaleName](#)
- [LoginId](#)
- [LoginName](#)

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)

## Alias

The Alias function in Expression Builder returns the alias of the signed-in user.

### Syntax

Alias()

### Result Type

String

**NOTE:** It is recommended that you use `UserValue('<Alias>')` instead of the Alias function. For more information about the UserValue function, see [UserValue](#) (on page 831).

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Currency

The Currency function in Expression Builder returns the currency code for the position of the signed-in user.

### Syntax

Currency()

### Result Type

String

**NOTE:** It is recommended that you use `UserValue('<CurrencyCode>')` instead of the Currency function. For more information about the UserValue function, see [UserValue](#) (on page 831).

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## DivisionName

The DivisionName function in Expression Builder returns the company name for the signed-in user.

### Syntax

DivisionName()

### Result Type

String

**TIP:** To get the division name for the signed-in user, use UserValue('<Division>'). For more information about the UserValue function, see [UserValue](#) (on page 831).

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## ExcludeChannel

The ExcludeChannel function in Expression Builder returns N if the specified channel name is the channel that the request came from.

### Syntax

ExcludeChannel(channel name)

### Result Type

Boolean

## Arguments

The following table describes the arguments for the function.

Argument	Description
channel name	<p>The name of the channel to be excluded.</p> <p>The following are valid channel strings:</p> <ul style="list-style-type: none"><li>■ Online</li><li>■ Mass Update</li><li>■ Record Merge</li><li>■ Offline</li><li>■ Web Services</li><li>■ Office</li><li>■ Partner</li><li>■ OEI</li><li>■ PIM</li></ul>

## Examples

The following example stops a process from being triggered by a Web service request:

```
AND ExcludeChannel ("Web Services")
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## FieldValue

The FieldValue function in Expression Builder returns the value of a field as a string.

## Syntax

```
FieldValue('<field_name>')
```

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
field_name	The valid XML name or customized integration tag corresponding to the chosen field.

## Examples

The following example:

```
FieldValue(' <CreateDate> ')
```

returns the value of the Created Date field as a string.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## FindNoneOf

The FindNoneOf function in Expression Builder returns the position of the first instance in the first argument (string1) that does not match any character in the second argument (string2).

## Syntax

```
FindNoneOf(string1, string2)
```

## Result Type

Integer



## Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

## Examples

The following example returns the value 4:

```
FindNoneOf ("abcdef", "abc")
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## FindOneOf

The FindOneOf function in Expression Builder returns the position of the first instance in the first argument (string1) of a character in the second argument (string2).

## Syntax

```
FindOneOf(string1, string2)
```

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

## Examples

The following example returns the value 3:

```
FindOneOf ("abcdef", "xyzc")
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## FirstName

The FirstName function in Expression Builder returns the first name of the signed-in user.

## Syntax

FirstName()

## Result Type

String

**NOTE:** It is recommended that you use `UserValue('<FirstName>')` instead of the `FirstName` function. For more information about the `UserValue` function, see [UserValue](#) (on page 831).

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## GetGroupId

The GetGroupId function in Expression Builder returns the Siebel CRM On Demand calendar-sharing group.

### Syntax

GetGroupId()

### Result Type

String

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## GetParentId

The GetParentId function in Expression Builder returns the Row Id of a parent record.

### Syntax

GetParentId()

### Result Type

String

### Example

If a contact is associated with an account with Row Id 12-1A876B, the GetParentId function returns the following value:

12-1A876B

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## IfNull

The IfNull function in Expression Builder returns the value from the first argument that is passed to the function. If the first argument returns NULL, the value from the second argument is returned.

## Syntax

IfNull(expr1, expr2)

## Result Type

The result type of the IfNull function is the type of its first argument, even if the first argument is NULL. The second argument is converted to the type of the first argument before its value is returned.

## Arguments

The following table describes the arguments for the function.

Argument	Description
expr1	A field name or expression.
expr2	The field name or expression that is returned if expr1 is NULL.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## IIf

The IIf function in Expression Builder returns one of two parameters based on the evaluation of a conditional expression. IIf is an abbreviation for Immediate If.

### Syntax

IIf(expr, result\_if\_true, result\_if\_false)

### Alternate Syntax

IIf(expr, expr\_if\_true, expr\_if\_false)

### Mixed Syntax

IIf(expr, result\_if\_true, expr\_if\_false)

IIf(expr, expr\_if\_true, result\_if\_false)

### Result Type

The result type of the IIf() function is always the type of its first argument. If the expression evaluates to FALSE, the second argument is converted to the type of the first argument before its value is returned.

### Arguments

The following table describes the arguments for the function.

Argument	Description
expr	The conditional expression that is to be evaluated.
result_if_true	The return value if the conditional expression evaluates to true.
result_if_false	The return value if the conditional expression evaluates to false.
expr_if_true	An expression to be evaluated if the conditional expression evaluates to true.
expr_if_false	An expression to be evaluated if the conditional expression evaluates to false.

## Examples

The following is an example of mixed syntax in the If function:

A business process requires that the Region field on an account detail page is to be updated when the Billing State field is changed as follows:

If the Billing State field is changed to OK or TX, the region field is to be updated to Central. If the Billing State field is changed to CA, the Region field is to be updated to West. For all other states, the Region field is to be updated to East.

```
IF([<PrimaryBillingState>]=' OK' OR [<PrimaryBillingState>]=' TX' , ' Central ' ,  
IF([<PrimaryBillingState>]=' CA' , ' West' , ' East' ))
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## InStr

The InStr function in Expression Builder returns the position of the first occurrence of one string within another.

## Syntax

Instr(string1, string2, start, end)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
string1	Specifies the string that is to be searched. The value can be a string literal, or a field name, or an expression that returns a string.

Argument	Description
string2	Specifies the string that is to be searched for. The value can be a string literal, or a field name, or an expression that returns a string.
start	(Optional) An integer that specifies the start point in string1.
end	(Optional) An integer that specifies the end point in string1.

## Examples

The following example returns the value 9:

```
InStr('john.doe@oracle.com', '@')
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## JobTitle

The JobTitle function in Expression Builder returns the Job Title of the signed-in user.

## Syntax

JobTitle()

## Result Type

String

**NOTE:** It is recommended that you use `UserValue('<JobTitle>')` instead of the JobTitle function. For more information about the UserValue function, see [UserValue](#) (on page 831).

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## JulianDay

The JulianDay function in Expression Builder returns the number of days that have elapsed since noon Universal Time, January 1, 4713 BC.

## Syntax

JulianDay(date)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianDay(Today())</p>

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)



## JulianMonth

The JulianMonth function in Expression Builder returns an integer that is equal to:

$$JulianYear * 12 + current\_month$$

where *JulianYear* is the year that is returned by the [JulianYear](#) (on page 811) function, *current\_month* is an integer from 1-12, and January is 1.

## Syntax

JulianMonth(date)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianMonth(Today())</p>

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## JulianQtr

The JulianQtr function in Expression Builder returns an integer that is equal to:

$$JulianYear * 4 + current\_quarter$$

where *JulianYear* is the year returned by the [JulianYear](#) (on page 811) function, and *current\_quarter* is:

$$(current\_month - 1) / 3 + 1$$

rounded down to the next integer.

## Syntax

JulianQtr(date)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianQtr(Today())</p>

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## JulianWeek

The JulianWeek function in Expression Builder returns an integer that is equal to:

$$\text{JulianDay} / 7$$

rounded down to the next integer, where *JulianDay* is the day that is returned by the [JulianDay](#) (on page 808) function.

### Syntax

JulianWeek(date)

### Result Type

Integer

### Arguments

The following table describes the arguments for the function.

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianWeek(Today())</p>

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## JulianYear

The JulianYear function in Expression Builder returns an integer that is equal to:

$$\text{current\_year} + 4713$$

### Syntax

JulianYear(date)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
date	<p>A field name that returns a date data type.</p> <p>To return the value for today's date, use the following syntax:</p> <p>JulianYear(Today())</p>

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Language

The Language function in Expression Builder returns the language code (for example, ENU) for the active, client language setting.

## Syntax

Language()

## Result Type

String

**NOTE:** It is recommended that you use `UserValue('<LanguageCode>')` instead of the Language function. For more information about the UserValue function, see [UserValue](#) (on page 831).

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LanguageName

The LanguageName function in Expression Builder returns the language name for the active, client language setting.

### Syntax

LanguageName()

### Result Type

String

**NOTE:** It is recommended that you use `UserValue('<Language>')` instead of the LanguageName function. For more information about the UserValue function, see [UserValue](#) (on page 831).

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LastName

The LastName function in Expression Builder returns the last name of the signed-in user.

### Syntax

LastName()

### Result Type

String

**NOTE:** It is recommended that you use `UserValue('<LastName>')` instead of the `LastName` function. For more information about the `UserValue` function, see [UserValue](#) (on page 831).

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

### Left

The `Left` function in Expression Builder returns a specified number of characters from the left side of a string.

### Syntax

`Left(string, length)`

### Result Type

String

### Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the leftmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to return. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

### Examples

If the current user's email address is `john.doe@oracle.com`, the following example returns the value `john`:

```
Left(UserValue('<EmailAddr>'), 4)
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Len

The Len function in Expression Builder returns the number of characters in a specified string.

## Syntax

Len(string)

## Result Type

Integer

## Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are counted. If the string is blank, 0 (zero) is returned. If the string contains Null, Null is returned.

## Examples

The following example returns the value 18:

```
Len("Oracle Corporation")
```

The following example returns the value 19 if the field contains a valid timestamp:

```
Len([<CreatedDate>])
```

The following example returns the value 19:

```
Len(Timestamp()) returns 19
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LN

The LN function in Expression Builder returns the natural log of the number passed in the argument.

## Syntax

LN(number)

## Result Type

Number

## Arguments

The following table describes the arguments for the function.

Argument	Description
number	The number for which the natural log is to be returned.

## Examples

The following example:

LN(10)

returns the value 2.30.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)



## LocalCurrency

The LocalCurrency function in Expression Builder returns the currency code for the signed-in user (for example, JPY).

### Syntax

LocalCurrency()

### Result Type

String

**NOTE:** It is recommended that you use `UserValue('<CurrencyCode>')` instead of the LocalCurrency function. For more information about the UserValue function, see [UserValue](#) (on page 831).

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Locale

The Locale function in Expression Builder returns the locale code for the signed-in user, for example, ENU.

### Syntax

Locale()

### Result Type

String

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LocaleListSeparator

The LocaleListSeparator function in Expression Builder returns the list separator character for the current locale, for example, a comma (,).

### Syntax

LocaleListSeparator()

### Result Type

String

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LocaleName

The LocaleName function in Expression Builder returns the locale name (for example, English - United States), for the signed-in user.

### Syntax

LocaleName()

### Result Type

String

**NOTE:** It is recommended that you use `UserValue('<Locale>')` instead of the `LocaleName` function. For more information about the `UserValue` function, see [UserValue](#) (on page 831)

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LoginId

The LoginId function in Expression Builder returns the Row ID of the signed-in user.

### Syntax

LoginId()

### Result Type

String

**NOTE:** It is recommended that you use UserValue('<UserId>') instead of the LoginId function. For more information about the UserValue function, see [UserValue](#) (on page 831).

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LoginName

The LoginName function in Expression Builder returns the Sign In ID of the signed-in user.

### Syntax

LoginName()

### Result Type

String

**NOTE:** It is recommended that you use UserValue('<UserSignInId>') instead of the LoginName function. For more information about the UserValue function, see [UserValue](#) (on page 831).

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LookupName

The LookupName function in Expression Builder finds a row in the List of Values table where all of the following are true:

- The TYPE field matches the type argument.
- The CODE field matches the lang\_ind\_code argument.
- The LANG\_ID field matches the language code of the currently active language.

This function returns the untranslated value (the language independent code) of the display value in the specified List of Values.

**TIP:** When specifying the parameters for the LookupName function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for a variety of data that the field can hold.)

## Syntax

LookupName(type, lang\_ind\_code)

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.
lang_ind_code	The display value.

## Example

If CALIFORNIA is the display value and CALIF is the language independent code, both of the following examples return the value CALIF:

```
LookupName(' STATE_ABBREV' , ' CALI FORNI A' )
```

```
LookupName(' STATE_ABBREV' , ' CALI F' )
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## LookupValue

The LookupValue function in Expression Builder returns a specified picklist value that is translated into the currently active language.

Picklist values are stored in the List of Values table. The LookupValue function returns the value in the VAL column of a row where all of the following are true:

- The TYPE column matches the type argument.
- The CODE column matches the lang\_ind\_code argument.
- The LANG\_ID column matches the language code of the currently active language.

The LookupValue function allows Siebel CRM On Demand to evaluate expressions involving picklist values uniformly across locales. For example, the value *White* in English is evaluated in the same way as the value *Blanc* in French.

**TIP:** When specifying the parameters for the LookupValue function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for different data that the field can hold.)

**NOTE:** The Sales Stage field in opportunity records is not a true picklist field. The LookupValue function does not work on this field.

## Syntax

LookupValue (type, lang\_ind\_code)

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.
lang_ind_code	The untranslated value in the list of values.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Mid

The Mid function in Expression Builder returns a specified number of characters from a string.

**TIP:** To determine the number of characters in a string, use the [Len](#) (on page 815) function.

## Syntax

Mid(string, start, length)

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are returned. If the string contains Null, a blank string is returned.

Argument	Description
start	The field name or expression that specifies the character position in the string at which the length count begins. If the value of the start argument is greater than the number of characters in the string, the Mid function returns a blank string.
length	Optional. The field name or expression that specifies the number of characters to return. If this argument is not used, or the length specified is greater than the number of characters that can be returned, all characters from the start position to the end of the string are returned.

## Examples

The following example returns seven characters (Builder), beginning with the twelfth character in a string:

```
Mid("Expressi on Bui lder i s easy!!", 12, 7)
```

The following examples return seven characters, beginning with the twelfth character from a text field that contains the text: *Expression Builder is easy!!*

```
Mid('<TextFiel dName>', 12, 7)
```

or

```
Mid([<TextFiel dName>], 12, 7)
```

The following example extracts the domain name from an email address:

```
Mid([<CreatedbyEmailAddress>],FindOneOf([<CreatedbyEmailAddress>], "@" ) + 1,  
Len([<CreatedbyEmailAddress>]))
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## OrganizationName

The OrganizationName function in Expression Builder returns the organization name of the signed-in user.

### Syntax

OrganizationName()

### Result Type

String

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## PRE

The PRE function in Expression Builder returns the previous value of the specified field when the field value is modified and before the value is updated in the database.

### Syntax

PRE('<fieldname>')

### Result Type

String

### Arguments

The following table describes the arguments for the function.

Argument	Description
fieldname	The name of the field that was modified.



## Examples

Example 1: To prevent a field value from being updated, create a workflow with the following condition:

```
PRE('<FieldName>') <> [<FieldName>]
```

and the following UpdateValue action (to set the field back to its original value):

```
Field Name = PRE('<FieldName>')
```

Example 2: To test a modified field that was initially null, use the following expression:

```
[<FieldName>] <> IfNull(PRE('<FieldName>'), "Invalid")
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Right

The Right function in Expression Builder returns a specified number of characters from the right side of a string.

## Syntax

```
Right(string, length)
```

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the rightmost characters are returned. If the string contains Null, Null is returned.

Argument	Description
length	An integer indicating the number of characters to return. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

### Examples

If the current user's email address is john.doe@oracle.com, the following example returns the value oracle.com:

```
Right(UserValue('<EmailAddr>'), Len(UserValue('<EmailAddr>')) -  
InStr(UserValue('<EmailAddr>'), '@'))
```

### Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

### RowIdToRowNum

The RowIdToRowNum function in Expression Builder converts an alphanumeric Row ID to a numeric format.

**NOTE:** Row IDs are generated by Siebel CRM On Demand using a proprietary algorithm, and have full referential integrity across the Siebel CRM On Demand database. The algorithm uses Base-36 encoding, a positional numeral system where the radix is 36. Using 36 as the radix allows the digits to be represented by the numbers 0-9 and the letters A-Z, which is an optimized, case-insensitive alphanumeric numeral system, based on ASCII characters.

### Syntax

RowIdToRowNum('row\_id')

### Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
row_id	The string literal, field name, or expression that returns an alphanumeric row ID.

## Examples

The following example:

```
RowIdToRowNum('12-6RX8L').
```

returns the value 38-8021253.

The following example:

```
RowIdToRowNum('12-Y09KG')
```

returns the value 38-57119344.

If the <AccountID> field contains '12-Y09KG', the following example:

```
RowIdToRowNum('<AccountID>')
```

returns the value 38-57119344.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## RowNum

The RowNum function in Expression Builder returns the position of the record within the active set of records.

## Syntax

```
RowNum()
```

## Result Type

Integer

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Timestamp

The Timestamp function in Expression Builder returns the server date and time converted to the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Timestamp function converts the server time to EDT. The TimeStamp function performs UTC (universal time code) conversion.

**NOTE:** Arithmetic operations (for example, add or subtract) are not supported with the Timestamp() function.

## Syntax

Timestamp()

## Result Type

Date Time

## Examples

The following example returns the current date and time, in the format month/day/year hours24:minutes:seconds:

```
Timestamp()
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## ToChar

The ToChar function in Expression Builder converts a specified date or numeric expression to a formatted string.

### Syntax

ToChar(expression, format)

### Result Type

String

### Arguments

The following table describes the arguments for the function.

Argument	Description
expression	An expression or field that returns a date, date and time, or a numeric value.
format	A string that represents the date or number format.

The following table describes the date formats for the function.

Format Code	Description
DD	Two-digit day of month (01-31).
MM	Two-digit month number (01-12 where 01 is JAN).
Y	Last digit of the year.
YY	Last two digits of the year.
YYYY	Four-digit year.
HH	Hour of day. HH maintains the hour format in 12- or 24-hour format as set in the expression.
mm	Minutes.
ss	Seconds.

The following table describes the number formats for the function.

Format Code	Example	Description
#	####	Returns the value with the specified number of digits, with a leading minus sign if the value is negative.
0	####.00	Returns leading zeros. Returns trailing zeros.
\$	\$####.00	Returns the value with a leading dollar sign.
,	#,###	Returns a comma in the specified position. A comma cannot appear to the right of the decimal point. The format model must not begin with a comma.
.	###.##	Returns a decimal point in the specified position. Only one decimal point is allowed in the format parameter. If the number of digits specified after the decimal point is less than the number of digits available after the decimal point, the decimal will be rounded up.

## Examples

The following example returns the value 10:

```
ToChar (10, '##.##')
```

The following example returns the value 10:

```
ToChar (10, '##.00')
```

The following example returns the value 10.24:

```
ToChar (10.2388, '##.00')
```

The following example returns the value -10.24

```
ToChar (-10.2388, '##.##')
```

The following example converts the value returned by the Timestamp() function into DD/MM/YYYY format:

```
ToChar(Timestamp(), 'DD/MM/YYYY')
```

For example, if the Timestamp() function returns a value of 02/29/2008 10:58:37, the previous expression evaluates to 29/02/2008.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Today

The Today function in Expression Builder returns today's date based on the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Today() function converts the server day to EDT. The Today() function performs UTC (universal time code) conversion.

## Syntax

Today()

## Result Type

Date

## Examples

If the current date is 11/27/2007, the following example:

Today() - 30

returns the value 10/28/2007.

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## UserValue

The UserValue function in Expression Builder returns the value of a specified attribute for the current user.

The fields on the User Detail view are attributes of the selected user.

## Syntax

UserValue('<attribute\_field\_name>')

## Result Type

String

## Arguments

The following table describes the arguments for the function.

Argument	Description
attribute_field_name	The associated field name (that is, the corresponding XML name or customized integration tag) used to define the attributes of the current user.

## Examples

Example1: A business process requires that a custom text field called Origin on a service request is to display by default the country of the user who creates the record (the current user) when the record is created.

To implement the business rule, in the Field Setup page for service requests, set the default value for the Origin field to `UserValue('<PersonalCountry>')`, and select the Post Default check box.

For information about creating and editing fields, see [Creating and Editing Fields](#) (on page 559).

Example 2: A business process requires that a certain workflow rule is triggered if the owner of an opportunity is not the administrator.

To implement the business rule, set up the following condition on the workflow rule:

`UserValue('<EMailAddr>') <> 'administrator@testdata.com'`

## Attributes

The following table lists the attribute field names that can be used as arguments in the UserValue function, and their corresponding attributes.

Field Name	Attribute	Sample Value
Alias	Alias	Admin
BusinessUnit	Business Unit	Business Unit
BusinessUnitLevel1	Business Unit Level 1	Business Unit L1
BusinessUnitLevel2	Business Unit Level 2	Business Unit L2
BusinessUnitLevel3	Business Unit Level 3	Business Unit L3
BusinessUnitLevel4	Business Unit Level 4	Business Unit L4
CellPhone	Cell Phone #	+1 555 2368978
CreatedBy	Created By	Siebel CRM On Demand CSR Admin



Field Name	Attribute	Sample Value
CreatedDate	Created Date	09/04/2007 17:00:00
CurrencyCode	Currency	USD
Department	Department	Department
Division	Division	Division
EMailAddr	Email	john.doe@oracle.com
EmployeeNumber	Employee Number	12345
ExternalSystemId	External Unique ID	EXTUID123
FirstName	First Name	John
FundApprovalLimit	Fund Approval Limit	50000
IntegrationId	Integration ID	INTUID123
JobTitle	JobTitle	Product Manager
Language	Language	English-American
LanguageCode	Language Code	ENU
LastLoggedIn	Last Sign In	10/31/2007 19:39:01
LastName	Last Name	Doe
Locale	Locale	English - Canada
Market	Market	Market
MiddleName	Middle Name	Middle
MiscellaneousNumber1	Miscellaneous Number 1	
MiscellaneousNumber2	Miscellaneous Number 2	
MiscellaneousText1	Miscellaneous Text 1	DUNS # (Webcat) = 10461
MiscellaneousText2	Miscellaneous Text 2	a7cff064-6566-47a2-8629-8b32d92de222
ModifiedBy	Modified By	John Doe
ModifiedDate	Modified Date	10/31/2007 19:32:58
MrMrs	Mr./Ms.	Mr.
NeverCall	Never Call	Y
NeverEmail	Never Email	Y

Field Name	Attribute	Sample Value
NeverMail	Never Mail	Y
PersonalAddressId	Address Id	AATA-HNCAU
PersonalCity	City	Toronto
PersonalCountry	Country	Canada
PersonalPostalCode	Postal Code	M4C2C3
PersonalProvince	Province	Ontario
PersonalStreetAddress	Number/Street	555 Main Avenue
PersonalStreetAddress2	Address 2	Suite 17
PhoneNumber	Work Phone #	+1 555 2365555
PrimaryGroup	Primary Group	User Group A
Region	Region	My Region
ManagerFullName	Reports To	John Smith
Role	Role	Field Sales Rep
RoleId	Role Id	1E1263-IYG1
SecondaryEmail	Secondary Email	john.doe2@oracle.com
ShowWelcomePage	Show Welcome Page on Sign In	N
Status	Status	Active
SubMarket	Submarket	My submarket
SubRegion	Subregion	My sub region
TimeZoneName	Time Zone	(GMT-05:00) Eastern Standard Time (US & Canada)
UserId	Row Id	1E1263-IZAU
UserSignInId	User Sign In ID	PTE169-14/ADMIN
WorkFax	Work Fax #	+1 555 2365556

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## UtcConvert

The UtcConvert function in Expression Builder converts the specified date and time from the current user's time zone setting, and returns the date and time in the specified time zone.

## Syntax

UtcConvert (utc\_date\_time, time\_zone)

## Result Type

Time

## Arguments

The following table describes the arguments for the function.

Argument	Description
utc_date_time	The date and time according to the current user's time zone setting in the format: MM/DD/YYYY HH24:MI:SS
time_zone	The name of a time zone

## Examples

If the current user's time zone setting is (GMT-05:00) Eastern Time (US & Canada), the following example:

```
UtcConvert(' 12/14/2007 17:07:05' , 'Paci fi c Standard Time' )
```

returns the following value:

```
12/14/2007 12:07:05
```

If the current user's time zone setting is (GMT+05:30) Calcutta, Chennai, Mumbai, New Delhi, the following example:

```
UtcConvert(' 12/14/2007 15:07:05' , 'Eastern Standard Time' )
```

returns the following value:

```
12/14/2007 04:37:05
```

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)

## Expression Builder Examples

In the Expression Builder window, you can use the sample expressions in the following table.

Expression Builder Sample Expressions	
<b>Update the field Opportunity Margin</b>	
Description	Update the field Opportunity Margin
Syntax	[<OpportunityMargin>] = [<OpportunityRevenue>] - [<OpportunityCost>]
<b>Validate small deals</b>	
Description	Field Validation. 'Small Deal' cannot have revenue greater than 1,000,000
Syntax	<= If (FieldValue(' <OpportunityCategory>' ) = 'Small Deal' , 1000000, [<Revenue>])
<b>Assign a newly-created Service Request to the creator</b>	
Description	Whenever a Service Request is created, set LoginId( ) as the default for the Service Request field 'Owned By Id'.
Syntax	[<OwnerId>] = LoginId()
<b>Check if the values of specified fields have changed</b>	
Description	Check for changes in field values
Syntax	(PRE(' <Actual Cost>' ) <> [<Actual Cost>]) OR (PRE(' <BudgetedCost>' ) <> [<BudgetedCost>])
<b>Trigger a workflow based on a close date</b>	
Description	If the close date is modified by more than a month, execute the workflow.
Syntax	([<CloseDate>] - PRE(' <CloseDate>' )) > 30

Expression Builder Sample Expressions	
<b>Trigger a workflow if an opportunity reaches a certain stage without a contact</b>	
Description	If an opportunity reaches the Closed/Won sales stage without having a contact, execute the workflow.
Syntax	<code>FieldValue('&lt;SalesStage&gt;') = "Closed/Won" AND PRE('&lt;SalesStage&gt;') &lt;&gt; [&lt;SalesStage&gt;] AND [&lt;KeyContactId&gt;] = "No Match Row Id"</code>
<b>Trigger a workflow when a check box is selected</b>	
Description	If the custom Ready for Review check box field is selected, execute the workflow.
Syntax	<code>FieldValue('&lt;bReady_for_Review_I TAG&gt;') = 'Y' AND (PRE('&lt;bReady_for_Review_I TAG&gt;') = 'N' OR IfNull(bReady_for_Review_I TAG, 'Y') = 'Y' )</code>
<b>Trigger an email when Activity workflow is created by someone other than the owner</b>	
Description	Trigger an email to the activity owner when an Activity workflow is created by someone other than the owner
Syntax	<code>[&lt;OwnerId&gt;] &lt;&gt; LogInId()</code>
<b>Trigger an email when Account type is changed</b>	
Description	Trigger an email when Account type is changed from "Prospect" to "Customer"
Syntax	<code>PRE('&lt;AccountType&gt;') = "Prospect" AND FieldValue('&lt;AccountType&gt;') = "Customer"</code>
<b>Exclude a specific channel from a workflow</b>	
Description	Do not execute a workflow for an online record
Syntax	<code>PRE('&lt;CampaignType&gt;') = "Advertisement" AND ExcludeChannel("Online")</code>

## Related Information

See the following topics for related Expression Builder information:

- [About Expression Builder](#) (on page 782)
- [Using Expression Builder](#) (on page 783)
- [Expression Builder Functions](#) (on page 795)



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