SIEBEL

CRM On Demand

Configuration Guide for Siebel CRM On Demand Financial Services Edition

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1 What’s New in This Release

What’s New in Configuration Guide for Siebel CRM On Demand Financial Services Edition, Release 15

Table 1 lists changes in this version of the guide to support Siebel CRM On Demand Financial Services Edition.

Table 1. What’s New in Configuration Guide for Siebel CRM On Demand Financial Services Edition, Release 15

Topic	Description
“Index” on page 43	Added Index

2 Siebel CRM On Demand Financial Services Edition—Configuration Overview

This chapter provides an overview of configuring CRM On Demand Financial Services edition. It includes the following topics:

- About Siebel CRM On Demand Industry Editions on page 7
- About Configuring Siebel CRM On Demand Financial Services Edition on page 7

About Siebel CRM On Demand Industry Editions

CRM On Demand provides industry-specific capabilities for the following industries:

- Financial services
- Life sciences
- Automotive
- High technology

These capabilities help customers to meet industry-specific business needs.

About Configuring Siebel CRM On Demand Financial Services Edition

If your company wants to use CRM On Demand Financial Services edition, you must first contact Customer Care and request that the industry-specific functionality is set up for your company. This initial setup process, which is referred to as *provisioning*, is performed by Customer Care. The provisioning process for the Financial Services edition exposes Web pages, features, and fields, which can differ from the standard application, but are relevant to your business.

As part of the provisioning process for the Financial Services edition, Customer Care creates the Financial Administrator role, and assigns it to your company administrator. This role gives company administrators the privileges and access options that they need to allow them to configure the application, create other roles, and grant the same privileges and access options to those other roles, as required. These tasks are described in "Configuring Siebel CRM On Demand Financial Services Edition" on page 9.

Customer Care can also set up other features in your application, including the following:

- Custom objects and company branding
- How your company accesses CRM On Demand
- How your company manages large volumes of data

This guide describes the tasks that are typically performed to configure Oracle's Siebel CRM On Demand Financial Services edition. The configuration settings described in this guide are suggested settings for the Financial Services edition. Your company requirements might differ from the suggested settings.

This guide describes only those tasks that are specific to the configuration of CRM On Demand Financial Services edition. For information about configuring and setting up the standard application, see the Online Help for CRM On Demand.

3 Configuring Siebel CRM On Demand Financial Services Edition

This chapter describes how to configure CRM On Demand Financial Services edition, and set up a typical role in the Financial Services edition.

The chapter includes the following topics:

- Process of Configuring Siebel CRM On Demand Financial Services Edition on page 9
- Configuring Field Setup for the Financial Services Edition on page 10
- Configuring Cascading Picklists for the Financial Services Edition on page 23
- Setting Up Page Layouts for the Financial Services Edition on page 28
- Modifying Sales Stages for the Financial Services Edition on page 36
- Setting Up Access Profiles for Financial Services Roles on page 37
- Creating Financial Services Roles on page 39

As part of the process of provisioning your Financial Services edition, Customer Care creates the Financial Administrator role, and assigns it to your company administrator. The Financial Administrator role gives company administrators the privileges and access options that they need to allow them to configure CRM On Demand Financial Services edition, create other roles, and grant the same privileges and access options to the other roles, as required.

The configuration settings described in this chapter are the suggested settings for CRM On Demand Financial Services edition and for a typical role defined in the Financial Services edition (the Financial Advisor role). Your company requirements might differ from the settings suggested in this chapter. Before you start to configure your CRM On Demand Financial Services edition, determine the fields, page layouts, access profiles, and roles that you need to configure to support your company's business needs.

Process of Configuring Siebel CRM On Demand Financial Services Edition

To configure CRM On Demand Financial Services Edition, perform the following tasks:

1. If you have not already done so, contact Customer Care, and ask them to provision your application to use CRM On Demand Financial Services edition.

   When Customer Care tells you that your application has been provisioned, go to Step 2.

2. Log in to CRM On Demand.
3. Configure the field setup.

   For more information, see "Configuring Field Setup for the Financial Services Edition" on page 10.

4. Configure the cascading picklists.

   For more information, see "Configuring Cascading Picklists for the Financial Services Edition" on page 23

5. Set up the page layouts for each role that you plan to create for the Financial Services edition.

   For more information, see "Setting Up Page Layouts for the Financial Services Edition" on page 28.

6. Modify the sales stages.

   For more information, see "Modifying Sales Stages for the Financial Services Edition" on page 36.

7. Set up the access profiles for the roles that you plan to create.

   For more information, see "Setting Up Access Profiles for Financial Services Roles" on page 37.

8. Create the roles for the Financial Services edition.

   For more information, see "Creating Financial Services Roles" on page 39.

Configuring Field Setup for the Financial Services Edition

In the Financial Services edition, it is recommended that you configure the field setup on a number of record types, as described here. Perform the steps in the following procedure for each of the following record types:

- Campaign
- Contact
- Contact Interests
- Household
- Lead
- Opportunity
- Service Request

This task is a step in "Process of Configuring Siebel CRM On Demand Financial Services Edition" on page 9.

To configure field setup for the Financial Services edition

1. In CRM On Demand, navigate to the Admin > Application Customization view.
2. In the Record Type Setup section, click the link for the required record type, for example, Campaign.
3. In the Field Management section, click the required Field Setup link, for example, Campaign Field Setup.
4. On the Fields page, click New Field, Rename Fields, the Edit link or the Edit Picklist link, as necessary, and set up the fields as required to support your business processes.

The following table shows the fields that you might want to set up in the Financial Services edition, with example values shown for some picklist fields.

Record Type	Field Name	Action
Campaign	Assets Target	Create a new field.
Campaign	Leads Targeted (#)	Rename to # Targeted.
Campaign	Source Code	Rename to Campaign ID.
Contact	Annual Revenue	Create a new field.
Contact	Assets Under Management	Create a new field.
Contact	Best Times To Call	Create a new, multi-select picklist field, with the following values: ■ Early Morning ■ Mid Morning ■ Noon ■ Early Afternoon ■ Late Afternoon ■ Evening ■ Weekend ■ Saturday ■ Sunday
Contact	Client Since	Create a new date type field.
Contact	Employer	Create a new field.
Contact	Goals	Create a new picklist field, with the following values: ■ Retirement ■ Saving for College ■ Risk Management ■ New Home ■ Asset Preservation ■ Wealth Accumulation ■ Tax Sheltering ■ Vacation Home ■ Predictable Income

Record Type	Field Name	Action
Contact	Investable Assets	Create a new field.
Contact	Investment Mix	Create a new picklist field, with the following values: ■ Equities ■ ETFs ■ Options ■ Treasuries ■ Munis ■ Agencies ■ Corporate Bonds ■ Alternatives ■ Money Markets ■ Mutual Funds ■ Structured Products ■ Limited Partnerships ■ Managed Futures ■ Hedge Funds ■ Futures ■ Currencies
Contact	Investment Objective P1	Create a new picklist field, with the following values: ■ Growth ■ Income ■ Tax Deferral ■ Liquidity
Contact	Investment Objective P2	Create a new picklist field, with the following values: ■ Growth ■ Income ■ Tax Deferral ■ Liquidity

Record Type	Field Name	Action
Contact	Investment Objective P3	Create a new picklist field, with the following values: ■ Growth ■ Income ■ Tax Deferral ■ Liquidity
Contact	Investment Objective P4	Create a new picklist field, with the following values: ■ Growth ■ Income ■ Tax Deferral ■ Liquidity
Contact	Next Call Date	Create a new field.
Contact	Potential Revenue	Create a new field.
Contact	Profession	Create a new field.
Contact	Referred By	Create a new field.
Contact	Total Life Insurance	Create a new field.
Contact	Account	Rename to Business Account.
Contact	Call Frequency	Edit the picklist values as follows: ■ Monthly ■ Bi-monthly ■ Quarterly ■ Semi-annually ■ Annually
Contact	Contact Type	Edit the picklist values as follows: ■ Lead ■ Prospect ■ Client ■ Dead End ■ Center of Influence ■ Friend ■ Colleague

Record Type	Field Name	Action
Contact	Created Timestamp	Rename to Created.
Contact	Customer ID	Rename to Contact ID.
Contact	Experience Level	Rename to Investing Experience. Edit the picklist values as follows: ■ Professional ■ Expert ■ Proficient ■ Limited ■ None
Contact	Investment Horizon	Edit the picklist values as follows: ■ Less than 5 Years ■ 5 to 10 Years ■ 10 to 15 Years ■ 15 to 20 Years ■ More than 20 Years
Contact	Lead Source	Rename to Source. Edit the picklist values as follows: ■ Advertisement ■ Direct Mail ■ Email ■ Event - Client Appreciation ■ Event - Other ■ Event - Seminar ■ Event - Trade Show ■ List - Purchased ■ List - Rented ■ Other ■ Referral - Client ■ Referral - External ■ Referral - Other ■ Web Site

Record Type	Field Name	Action
Contact	Primary Group	Rename to Advisor Team.
Contact	Risk Profile	Rename to Risk Tolerance. Edit the picklist values as follows: ■ Conservative ■ Moderate ■ Aggressive
Contact	Segment	Rename to Demographic.
Contact	Tier	Rename to Book Segment. Edit the picklist values as follows: ■ A ■ B ■ C ■ D
Contact	Total Net Worth	Rename to Net Worth.
Contact Interests	Interests	Rename to Category. Edit the picklist values as follows: ■ Culture ■ Food and Wine ■ Hobby ■ Investments ■ Physical Fitness ■ Professional Sports ■ Public Service ■ Travel ■ Other **NOTE:** This field is used in a cascading picklist (with the Category field, which is renamed to Interests). This field must be renamed to Category to allow the cascading picklist field to be set up correctly.

Record Type	Field Name	Action
Contact Interests	Category	Rename to Interests. Edit the picklist values as follows: ■ Aerobics ■ Alternative Investments ■ Backpacking ■ Ballet ■ Baseball ■ Basketball ■ Cabernet ■ Chardonnay ■ Charity Work ■ Church Board ■ Community Government ■ Domestic Travel ■ Equities ■ Film ■ Fine Art ■ Fixed Income ■ Food Bank Volunteer ■ Football ■ French Food ■ Gelato ■ Horseback Riding ■ Horse Racing ■ International Travel ■ Local Arts Board ■ Mexican Food ■ Model Airplanes ■ Modern Dance ■ Mutual Funds

Record Type	Field Name	Action
		■ NASCAR ■ Numismatics ■ Opera ■ Philately ■ Pinot Noir ■ Port ■ Private Equity ■ Real Estate ■ Running ■ Soccer ■ Structured Products ■ Symphony ■ Tennis ■ Theatre ■ Weight Lifting ■ Other **NOTE:** This field is used in a cascading picklist (with the Interests field, which is renamed to Category). This field must be renamed to Interests to allow the hierarchy to be set up correctly. Add the values in a single list. When you later set up the cascading picklist, you will specify the relationship between the values in the Category field and the values in the Interests field.
Household	Annual Revenue	Create a new field.
Household	Assets Under Management	Create a new field.
Household	Investable Assets	Create a new field.
Household	Investment Objective P1	Create a new picklist field, with the following values: ■ Growth ■ Income ■ Tax Deferral ■ Liquidity

Record Type	Field Name	Action
Household	Investment Objective P2	Create a new picklist field, with the following values: ■ Growth ■ Income ■ Tax Deferral ■ Liquidity
Household	Investment Objective P3	Create a new picklist field, with the following values: ■ Growth ■ Income ■ Tax Deferral ■ Liquidity
Household	Investment Objective P4	Create a new picklist field, with the following values: ■ Growth ■ Income ■ Tax Deferral ■ Liquidity
Household	Potential Revenue	Create a new field.
Household	Risk Tolerance	Create a new picklist field, with the following values: ■ Conservative ■ Moderate ■ Aggressive
Household	Tax Bracket	Create a new field.
Household	Total Life Insurance	Create a new field.
Household	Contact	Rename to Address.
Household	Description	Rename to General Notes.
Household	Home Phone	Rename to Primary Contact Phone.
Household	Last Activity	Rename to Last Activity Date.
Household	Primary	Rename to Primary Contact.
Household	Primary Group	Rename to Advisor Team.
Household	Total Net Worth	Rename to Net Worth.
Household	Type	Rename to Household Type.
Lead	Home Phone #	Create a new field.

Record Type	Field Name	Action
Lead	Investable Assets	Create a new field.
Lead	Needs	Create a new, multi-select picklist field, with the following values: ■ Financial Planning ■ Retirement Planning ■ Education Planning ■ Life Insurance ■ Investment Management ■ Risk Management ■ Estate Planning
Lead	Profession	Create a new field.
Lead	Billing	Rename to Address.
Lead	Created By	Rename to Created.
Lead	Modified By Date	Rename to Modified.
Lead	Owner Full Name	Rename to Owner.
Lead	Primary Phone #	Rename to Work Phone #.
Lead	Sales Person	Rename to Financial Advisor.
Lead	Source	Add the following value to the picklist: Referral - Client.
Opportunity	Product or Service	Create a new picklist field, with the following values. Product options: ■ Fixed Income ■ Annuity ■ Equities ■ Mutual Fund ■ Structured Product ■ Managed Futures ■ Hedge Fund ■ Limited Partnership ■ Life Insurance ■ Long-term Care Insurance ■ Money Market

Record Type	Field Name	Action
		■ Checking/Credit Card ■ 401K ■ SEP IRA ■ SIMPLE IRA ■ Profit Sharing Plan ■ Stock Options Plan ■ 529 Plan Service options: ■ Financial Planning ■ Retirement Planning ■ Education Planning ■ Investment Management ■ Risk Management ■ Estate Planning **NOTE:** This field is used in a cascading picklist with the Opportunity Type field. Add the values in a single list. When you later set up the cascading picklist, you will specify the relationship between the values in the Product or Service field and the values in the Opportunity Type field.
Opportunity	Potential Commission	Create a new field.
Opportunity	Account	Edit the field as follows: ■ Rename to Business Account. ■ Deselect the Required check box in the Additional Information section of the Opportunity Field Edit page. **NOTE:** You must also deselect the Required check box for the Account field on the opportunity page layout for each role in the Financial Services edition. For more information on setting up page layouts, see "Setting Up Page Layouts for the Financial Services Edition" on page 28.
Opportunity	Close Date	Deselect the Required check box.

Record Type	Field Name	Action
Opportunity	Opportunity Type	Edit the picklist values as follows: ■ Product ■ Service **NOTE:** This field is used in a cascading picklist with the Product or Service field.
Opportunity	Reason Won/Lost	Edit the picklist values as follows: ■ Control Issues ■ Hired Personal Referral ■ Fees too High ■ Lack of Experience ■ Did Not Perceive Value ■ Do-It-Yourselfer ■ Lost to Competition ■ Lost to No Decision ■ Other ■ Relationship ■ Track Record ■ Referral ■ Existing Relationship
Opportunity	Revenue	Rename to Potential Revenue.
Service Request	Area	Create a new picklist field with the following values: ■ Forms ■ Accounts ■ Profile ■ Online Access ■ Distributions ■ Other **NOTE:** This field is used in a cascading picklist with the Type field (renamed to Issue).
Service Request	Cell Phone #	Create a new field.
Service Request	Home Phone #	Create a new field.

Record Type	Field Name	Action
Service Request	Preferred Contact Method	Create a new picklist field with the following values: ■ Home Phone ■ Work Phone ■ Cell Phone ■ Email
Service Request	Account	Rename to Business Account.
Service Request	Type	Rename to Issue. Edit the picklist values as follows. Forms options: ■ IRA Distribution ■ IRA Beneficiary Designation Accounts options: ■ Name Change ■ Address Change ■ Phone Number Change ■ Enable Margin ■ Enable Options Trading Profile options: ■ Risk Profile Change ■ Financial Situation Change ■ Marital Status Change ■ Objectives Change Online Access options: ■ Forgot Username/Password ■ Enable Online Trading

Record Type	Field Name	Action
		Distributions options: ■ IRA Distribution ■ Send Check Other options: Other **NOTE:** This field is used in a cascading picklist with the Area field. Add the values in a single list. When you later set up the cascading picklist, you will specify the relationship between the values in the Issue field and the values in the Area field.

Configuring Cascading Picklists for the Financial Services Edition

The suggested settings for the Financial Services edition include a number of cascading picklist fields. To set up the cascading picklist fields, perform the steps in the following procedure.

This task is a step in "Process of Configuring Siebel CRM On Demand Financial Services Edition" on page 9.

To configure a cascading picklist for the Financial Services edition

1. In CRM On Demand, navigate to the Admin > Application Customization view.
2. In the Record Type Setup section, click the link for the required record type, for example, Contact.
3. In the Cascading Picklists section, click the required Cascading Picklists link, for example, Contact Interests Cascading Picklists.
4. In the Cascading Picklists page, do one of the following:
   - Click Edit or Copy to modify an existing cascading picklist definition.
   - Click New to create a new cascading picklist definition.

   The Cascading Picklists Wizard opens.
5. Select the parent picklist field and the related picklist field.

   NOTE: In a cascading picklist, the value that the user selects in the parent field determines which value the user can see in the drop-down list in the related field.
6. In the wizard, go to step 2 (Select Values), and specify the values that are to be displayed in the drop-down list on the related field when the user selects a value in the parent field.

   Click a value in the parent field, and use the directional arrows to move the corresponding values for the related field from the Related Picklists Available Values list to the Related Picklist Displayed Values list.

The following table shows an example configuration for cascading picklists for contact interests in the Financial Services edition.

Cascading Picklist Type	Parent Picklist Field	Related Picklist Field
Contact Interest	Interests	Category
	Parent Picklist Value	**Related Picklist Value**
	Culture	■ Ballet ■ Film ■ Fine Art ■ Modern Dance ■ Opera ■ Symphony ■ Theatre
	Food and Wine	■ Cabernet ■ Chardonnay ■ French Food ■ Gelato ■ Mexican Food ■ Pinot Noir ■ Port
	Hobby	■ Backpacking ■ Horseback Riding ■ Model Airplanes ■ Numismatics ■ Philately
	Investments	■ Alternative Investments ■ Equities ■ Fixed Income ■ Mutual Funds ■ Private Equity ■ Real Estate ■ Structured Products

Cascading Picklist Type	Parent Picklist Field	Related Picklist Field
	Parent Picklist Value	**Related Picklist Value**
	Physical Fitness	■ Aerobics ■ Backpacking ■ Horseback Riding ■ Running ■ Tennis ■ Weight Lifting
	Professional Sports	■ Baseball ■ Basketball ■ Football ■ Horse Racing ■ NASCAR ■ Soccer
	Public Service	■ Charity Work ■ Church Board ■ Community Government ■ Food Bank Volunteer ■ Local Arts Board
	Travel	■ Backpacking ■ Domestic Travel ■ International Travel
	Other	■ Other

The following table shows an example configuration for cascading picklists for opportunities in the Financial Services edition.

Cascading Picklist Type	Parent Picklist Field	Related Picklist Field
Opportunity	Opportunity Type	Product or Service
	Parent Picklist Value	**Related Picklist Value**
	Product	■ Fixed Income ■ Annuity ■ Equities ■ Mutual Fund ■ Structured Product ■ Managed Futures ■ Hedge Fund ■ Limited Partnership ■ Life Insurance ■ Long-term Care Insurance ■ Money Market ■ Checking/Credit Card ■ 401K ■ SEP IRA ■ SIMPLE IRA ■ Profit Sharing Plan ■ Stock Options Plan ■ 529 Plan
	Service	■ Financial Planning ■ Retirement Planning ■ Education Planning ■ Investment Management ■ Risk Management ■ Estate Planning

The following table shows an example configuration for cascading picklists for service requests in the Financial Services edition.

Cascading Picklist Type	Parent Picklist Field	Related Picklist Field
Service Request	Area	Type
	Parent Picklist Value	**Related Picklist Value**
	Forms	■ IRA Distribution ■ IRA Beneficiary Designation
	Accounts	■ Name Change ■ Address Change ■ Phone Number Change ■ Enable Margin ■ Enable Options Trading
	Profile	■ Risk Profile Change ■ Financial Situation Change ■ Marital Status Change ■ Objectives Change
	Online Access	■ Forgot Username/Password ■ Enable Online Trading
	Distributions	■ IRA Distribution ■ Send Check
	Other	■ Other

7 In the wizard, go to step 3 (Confirm), review your field configuration, and then click Finish to complete the setup.

Setting Up Page Layouts for the Financial Services Edition

It is recommended that you set up page layouts for each role that you intend to create in the Financial Services edition.

When setting up a page layout, you can create a new layout, or you can copy or edit an existing layout. You can add fields to the page layout as well as to the sections within the page, and you can also expose the related information in the page layout.

Company administrators typically set up the page layouts for the following record types for each role in the Financial Services edition:

- Campaign
- Contact
- Household
- Lead
- Opportunity
- Service Request

The tables in Step 10 and Step 11 of this procedure show the details of the page layouts and related information sections that company administrators typically set up for the Financial Services edition.

This task is a step in "Process of Configuring Siebel CRM On Demand Financial Services Edition" on page 9.

To set up a page layout for the Financial Services edition

1. In CRM On Demand, navigate to the Admin > Application Customization view.
2. In the Record Type Setup section, click the link for the required record type, for example, Contact.
3. In the Page Layout Management section, click the link for the required page layout type, for example, Contact Page Layout.
4. If you want to create a copy of an existing layout, or to create a new layout, perform the following steps:
   a. On the *record type* Page Layout page, click the Copy link next to a layout to create a new layout, based on an existing layout, or click New Layout on the title bar to create an entirely new layout.

      The Page Layout wizard opens.

   b. In Step 1 of the wizard, enter a name for the layout and (optionally) a description.
   c. Click Finish to save the layout.

   NOTE: You will return later to the Page Layout wizard to finish setting up the page layout.

5 On the *record type* Page Layout page, click the Edit Sections link for the layout that you want to configure.

The Section Names Setup page opens.

6 Enter the labels for any new sections that you want to set up on the page layout.

The following table shows the sections that company administrators typically set up for page layouts for each role in the Financial Services edition.

Page Layout	Existing Section Name	Rename To
Contact	Contact Detail Information	Personal Profile
	Additional Information	Financial Profile
	Available Section	Investment Profile
	Available Section	Additional Information
Household	Available Section	Household Financial Profile
	Available Section	Household Investment Profile
	Available Section	Additional Information

7 Click Save.

8 On the *record type* Page Layout page, click the Edit link next to the layout that you want to configure.

The Page Layout wizard opens.

9 In the wizard, go to Step 2 (Field Setup), and specify the field setup for the page layout. For each available field, select either the Required or Read-Only check box, as necessary to support your business processes.

NOTE: You must deselect the Required check box for the Business Account field (that is, the renamed Account field) and the Close Date field on the opportunity page layout for each role in the Financial Services edition.

See the table in Step 10 of this procedure for details of the fields in the suggested page layouts and sections for the Financial Services edition.

10 In the wizard, go to Step 3 (Field Layout), and configure the field layout for the page.

The following table shows the page layouts that are typically configured for each role in the Financial Service edition. Use the directional arrows to add fields to the various page sections, and remove any fields that are not needed, by moving them from the page sections to the Available Fields list.

Record Type	Page Section Layout	
Campaign	**Key Campaign Information**	
	Campaign ID	Status
	Campaign Name	Start Date
	Campaign Type	End Date
	Objective	Campaign Currency
	Audience	
	Offer	
	Campaign Plan Information	
	Assets Target	Budgeted Cost
	Revenue Target	Actual Cost
	# Targeted	
	Additional Information	
	Owner	Modified By
	Created By	
	General Notes	
Contact	**Key Contact Information**	
	Mr./Ms.	Job Title
	First Name	Employer
	Middle Name	Self-Employed
	Last Name	Profession
	Business Account	Work Phone #
		Cellular Phone #
		Home Phone #
		Email
	Personal Profile	
	Contact Type	Last Call Date
	Book Segment	Call Frequency

Record Type	Page Section Layout	
	Demographic	Next Call Date
	Date of Birth	Best Times to Call
	Age	Referred By
	Gender	Client Since
	Marital Status	Goals
	Contact ID	Source
	Financial Profile	
	Assets Under Management	Total Assets
	Investable Assets	Total Liabilities
	Total Income	Net Worth
	Total Expenses	Total Life Insurance
	Annual Revenue	Credit Score
	Potential Revenue	Tax Bracket
		Contact Currency
	Investment Profile	
	Risk Tolerance	Investment Objective P1
	Investing Experience	Investment Objective P2
	Investment Horizon	Investment Objective P3
	Investment Mix	Investment Objective P4
	Additional Information	
	Advisor Team	Modified By
	Owner	Created
	Last Activity Date	
	General Notes	

Record Type	Page Section Layout	
Household	**Key Household Information**	
	Household Name	Address
	Primary Contact	
	Primary Contact Phone	
	Household Type	
	Segment	
	Time Zone	
	Household Financial Profile	
	Assets Under Management	Total Assets
	Investable Assets	Total Liabilities
	Total Income	Net Worth
	Total Expenses	Total Life Insurance
	Annual Revenue	Tax Bracket
	Potential Revenue	Household Currency
	Household Investment Profile	
	Risk Tolerance	Investment Objective P1
	Investment Horizon	Investment Objective P2
		Investment Objective P3
		Investment Objective P4
	Additional Information	
	Advisor Team	Modified By
	Owner	Last Activity Date
	General Notes	

Record Type	Page Section Layout	
Lead	**Key Lead Information**	
	Mr./Ms.	Job Title
	First Name	Profession
	Last Name	Work Phone #
	Address	Cellular Phone #
		Home Phone #
		Email
		Referred By
	Opportunity Related Information	
	Status	Source
	Rating	Campaign
	Needs	Investable Assets
	Estimated Close Date	Potential Revenue
	Additional Information	
	Financial Advisor	Reassign Owner
	Created	Owner
	Modified	
	General Notes	
Opportunity	**Key Opportunity Information**	
	Opportunity Name	Potential Revenue
	Primary Contact Last Name	Potential Commission
	Business Account	Close Date
	Sales Stage	
	Opportunity Type	
	Product or Service	
	Sales Detail Information	
	Status	Probability
	Priority	Reason Won/Lost
	Additional Information	
	Owner	Modified By
	General Notes	

Record Type	Page Section Layout	
Service Request	**Contact Information**	
	SR Number	Work Phone #
	Contact	Cell Phone #
	Business Account	Home Phone #
		Email
		Preferred Contact Method
	Service Detail Information	
	Area	Priority
	Issue	Status
	Source	Opened Time
	Modified By	Closed Time
	Created By	Owner
	SR Currency	Reassign Owner
	Additional Information	
	Subject	
	Description	

11 In the wizard, go to Step 4 (Related Information), and move the Related Information items to the Displayed Information or Available Information sections, as required.

The following table lists the related information sections that company administrators typically expose (that is, move to the Displayed Information section) in the page layouts for each role in the Financial Services edition.

Page Layout	Related Information
Campaign	Open Activities
	Completed Activities
	Leads
	Opportunities
	Notes
	Attachments
	Recipients

Page Layout	Related Information
Contacts	Contact Team
	Opportunities
	Contact Interests
	Contact Relationships
	Referrals
	Notes
	Service Requests
	Campaigns
	Attachments
	Open Activities
	Completed Activities
	Addresses
	Households
Household	Contacts
	Opportunities
	Notes
	Leads
	Service Requests
	Household Team
	Attachments
	Open Activities
	Completed Activities
	Portfolios
Lead	Lead Qualification Scripts
	Open Activities
	Completed Activities
	Attachments

Page Layout	Related Information
Opportunity	Contacts
	Product Revenues
	Notes
	Open Activities
	Completed Activities
	Opportunity Partners
	Opportunity Competitors
	Leads
	Attachments
Portfolios	Portfolios
	Contacts
	Open Activities
	Completed Activities
	Portfolio Team
Service Request	Open Activities
	Completed Activities
	Notes
	Audit Trail
	Attachments

12 Click Finish.

Modifying Sales Stages for the Financial Services Edition

Complete the steps in the following procedure to modify the sales stages. Table 2 shows the suggested sales stages for the Financial Services edition:

Table 2. Sales Stages for the Financial Services Edition

Sales Stage	Default Probability	Order
New Opportunity	10	1
Initial Communication	20	2
Discovery	30	3

Table 2. Sales Stages for the Financial Services Edition

Sales Stage	Default Probability	Order
Opportunity Analysis	40	4
Solution Development	50	5
Solution Presentation	60	6
Client/Prospect Evaluation	70	7
Commitment to Buy	80	8
Paperwork Signed	90	9
Closed/Won	100	10
Closed/Lost	0	11

This task is a step in "Process of Configuring Siebel CRM On Demand Financial Services Edition" on page 9.

To modify the sales stages for the Financial Services edition

1. In CRM On Demand, navigate to the Admin > Data Rules & Assignment view.
2. In the Sales Methodology section, click the Sales Processes link.
3. On the Sales Process List page, click the Sales Process Name link.
4. In the Sales Stage title bar, click New, or in the row for an existing sales stage, click Edit.
5. On the Sales Stage Edit page, enter a name for the sales stage or edit the name for an existing one.
6. On the Sales Stage Edit page, enter a number in the Order field for the sales stage, or edit the Order # (number) for an existing one.

   Order # (number) corresponds to the position of the sales stage in the picklist.
7. Click Save.

   Repeat these steps for each sales stage that you want to add or edit.

Setting Up Access Profiles for Financial Services Roles

You must set up two profiles for each financial services role:

- **Default access profile.** Sets the access levels for records not owned by the user (or by the user's group).
- **Owner access profile.** Sets the access levels for the records owned by the user, by the user's group, or by someone who reports to the user (if manager visibility is enabled).

Complete the steps in the following procedure for each of the required access profiles. This task is a step in "Process of Configuring Siebel CRM On Demand Financial Services Edition" on page 9.

To set up the default access and owner access profiles for a financial services role

1 In CRM On Demand, navigate to the Admin > User Management & Access Controls > Access Profiles view.

2 Click the Copy link on the appropriate profile, as follows:

- If you are setting up a default access profile, click the Copy link on a default access profile that is similar to the one you want to set up.

  For example, to create the default access profile for a financial advisor, click the Copy link on the Field Sales Rep Default Access Profile.

- If you are setting up an owner access profile, click the Copy link on an owner access profile that is similar to the one you want to set up.

  For example, to create the owner access profile for a financial advisor, click the Copy link on the Field Sales Rep Owner Access Profile.

The Access Profile Wizard opens.

3 In Step 1 of the wizard, enter a name for the access profile (for example, Financial Advisor Default Access Profile or Financial Advisor Owner Access Profile).

4 In the wizard, go to Step 2 (Specify Access Levels), and change the access settings for the role, as necessary.

For example, the following table lists the access settings that company administrators typically configure for a financial advisor role.

NOTE: In the following table, the greater than symbol (>) in the Record Type column indicates a related information section. For example, Contact > Contact Interests refers to the Contact Interests related information section on a contact record. To set the access levels for the related items, click the Related Information link next to a record type.

Record Type	Default Access	Owner Access
Contact > Contact Interests	Full	Full
Contact > Contact Relationships	Read/Create	Full
Contact > Households	Full	Full
Contact > Portfolios	Full	Full
Contact > Referrals	View	View
Household	Read/Edit/Delete	Read/Edit/Delete
Household > Attachments	Read-Only	Read-Only
Household > Completed Activities	Read-Only	Read-Only

Record Type	Default Access	Owner Access
Household > Contacts	Full	Full
Household > Household Team	Full	Full
Household > Leads	Read-Only	Read-Only
Household > Notes	Read-Only	Read-Only
Household > Open Activities	Read-Only	Read-Only
Household > Opportunities	Read-Only	Read-Only
Household > Portfolios	Read-Only	Read-Only
Household > Service Requests	Read-Only	Read-Only
Portfolio	Read/Edit	Read/Edit/Delete
Portfolio > Completed Activities	View	View
Portfolio > Contacts	Full	Full
Portfolio > Open Activities	View	View
Portfolio > Portfolio Sub-Accounts	View	View
Portfolio > Team	Full	Full

5 Click Finish.

Creating Financial Services Roles

Complete the steps in the following procedure to create a financial services role. This task is a step in "Process of Configuring Siebel CRM On Demand Financial Services Edition" on page 9.

To create a financial services role

1. In CRM On Demand, navigate to the Admin > User Management & Access Controls > Role Management view.
2. Click the Copy link on an existing role that is similar to the role you want to create.

   For example, to create the Financial Advisor role, copy the Field Sales Rep role.

   The Role Management wizard opens.
3. In Step 1 of the wizard, enter the role name (for example, Financial Advisor) and description.

4 In the wizard, go to Step 2 (Record Type Access), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services settings that company administrators typically configure for a financial advisor role.

Role	Record Type	Has Access	Can Create	Can Read All Records
Financial Advisor	Contact	Selected	Selected	Not Selected
	Household	Selected	Selected	Not Selected
	Portfolio	Selected	Selected	Not Selected

5 In the wizard, go to Step 3 (Access Profiles), and select the access profiles that you created earlier for the role.

6 In the wizard, go to Step 4 (Privileges), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services privileges that company administrators typically configure for a financial advisor role.

Role	Category	Privilege	Assign
Financial Advisor	CRM	Manage Contact Interest Access	Not Selected
	CRM	Manage Extended Contact and Account Relationship Access	Not Selected
	CRM: Sales	Manage Referrals	Not Selected
	Industry-Specific: Financial Services	Manage Households Access	Not Selected
	Industry-Specific: Financial Services	Manage Portfolios Access	Not Selected

7 In the wizard, go to Step 5 (Tab Access & Order), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services settings that company administrators typically configure for a financial advisor role.

Role	Tab	Move To
Financial Advisor	Households	Selected Tabs
	Portfolios	Selected Tabs

8 In the wizard, go to Step 6 (Page Layout Assignment), and assign a page layout to each record type.

9 In the wizard, go to Step 7 (Search Layout Assignment), and assign a search layout to each record type.

   For information on setting up search layouts, see the Online Help for CRM On Demand.

10 In the wizard, go to Step 8 (Homepage Layout Assignment), and assign a homepage layout to each record type.

   For information on setting up homepage layouts, see the Online Help for Oracle's Siebel CRM On Demand.

11 Click Finish.

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