SIEBEL eBusiness 7

Siebel Sales User Guide

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Introduction

This book includes descriptions and procedures for using Siebel Sales and is useful to individuals whose titles or job descriptions are similar to the following positions.

Sales Professionals	Persons who use Siebel Sales to manage sales leads, opportunities, accounts, quotes, and so on.
Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

How This Guide Is Organized

This guide includes general information and procedures for Siebel Sales end users. Information included in this guide can also help administrators and application developers who need to understand the Siebel Sales application to customize it.

Chapters are organized according to a typical sales methodology process flow:

- **Prospecting**. These chapters include procedures for managing contacts, accounts, opportunities, and Dun & Bradstreet integration.
- **Qualification**. These chapters include procedures for managing competitors and products.
- **Managing a Customer Relationship**. These chapters include procedures for managing activities, correspondence, literature, categories, and messages, a separately licensed product.
- **Proposing a Solution**. This chapter includes information on quotes and orders.
- **Closing**. These chapters include information on Target Account Selling and Strategic Selling® sales methodologies.

NOTE: All Siebel MidMarket product names include the phrase MidMarket Edition to distinguish this product from other Siebel eBusiness Applications. However, in the interest of brevity, after the first mention of a MidMarket product in this document, the product name is given in abbreviated form. For example, after Siebel Call Center, MidMarket Edition, has been mentioned once, it is referred to simply as Siebel Call Center. Such reference to a product using an abbreviated form should be understood as a specific reference to the associated Siebel MidMarket Edition product, and not any other Siebel Systems offering. When you contact Siebel Systems for technical support, sales, or other issues, furnish the full name of the product to verify its proper identification and handling.

Additional Resources

The following Siebel application guides contain information relevant to your use of Siebel Sales:

- For information on administrative procedures and tasks, see *Applications Administration Guide, MidMarket Edition*.
- For information on campaigns, see *Siebel Call Center User Guide, MidMarket Edition*.
- For information on list management, see *Siebel Campaigns Guide, MidMarket Edition*.
- For information on SmartScripts, see *Siebel SmartScript Administration Guide, MidMarket Edition*.
- For information on forecasting, see *Siebel Forecasting Guide, MidMarket Edition*.
- For development resources and information, see *Siebel Tools Reference, MidMarket Edition* and *Siebel Tools Online Help, MidMarket Edition*.

Revision History

Siebel Sales User Guide, MidMarket Edition, Version 7.5.

Overview 1

This chapter explains how a typical sales organization is structured, the sales workflow process, and a typical sales organization’s goals and strategies.

The Sales Organization

The primary purpose of a sales organization is to increase revenues while maximizing profits. The sales process varies by organization. However, certain similarities do exist. Siebel Sales allows each organization to adapt its usage to current business needs, while building on similarities in practices found across many sales organizations.

Siebel Sales assists sales professionals throughout the entire sales cycle with tools and information that help the sales team manage opportunities, the sales pipeline, customer profiles, accounts, products, pricing, competitors, and sales brochures and data sheets.

Sales Strategy

The workflow shown in Figure 1 describes the sales process. Sales strategy and prospecting begin the pipeline process, followed by leads qualification, opportunities management, customer proposals, and closing the deals.

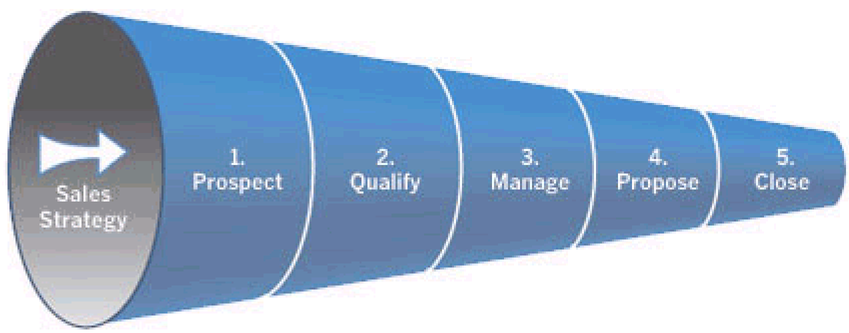


Figure 1. Sales Process Workflow

Siebel Sales provides the sales professional with a view of each customer interaction across multiple channels including the Web, call center, and partner organizations. Using Siebel Sales, the sales team has the account, contact, and history information it needs to make better decisions.

Siebel Sales offers tools for each sales task. The tools include the following:

- Contacts and Accounts management
- Opportunities
- Quotes
- Correspondence and Literature
- Activities
- D&B
- Target Account Selling and Strategic Selling

Sales Goals and Strategies

Table 1 shows a typical sales organization's goals and corresponding strategies. An example of a goal is maximize profits. The corresponding strategy is instituting uniform sales methods and practices.

Table 1. Typical Sales Organization Goals and Strategies

Goal	Strategy
Sell products and services	Generate new sales opportunities
Shorten sales cycle	Deliver a well-trained sales force
Maximize profits	Institute uniform sales methods and practices
Maximize customer satisfaction	Build and maintain relationships with existing customers

Contacts 2

This chapter explains how sales professionals can use the Contacts screen to record information about individuals who interact with their company.

Contacts Overview

Contacts are individuals with whom your company conducts business or expects to conduct business in the future. Contacts can be employees of other companies, independent consultants, vendors, or personal acquaintances. Contacts can be associated with several accounts, but a contact is the primary on only one account. Contacts, including those contacts that are not related to accounts, can also be associated with a number of opportunities.

Business Scenario

In the course of a business day, sales representatives interact with other professionals. These formal and informal exchanges can result in potential leads or sales opportunities.

Using Siebel Sales, the sales representative can determine if her company has done business with this particular company by reviewing account and contact records. The sales representative can also create new contact records in the Siebel Sales application, and associate the contacts with new or existing accounts.

If the possibility of doing business—an opportunity—arises, the sales representative can create the opportunity and associate activities and contacts with the opportunity. This helps the sales representative track important milestones for obtaining and closing deals.

Contacts Views and Procedures

When you identify an individual who is a possible source for leads, you can add that individual's information to your Siebel application as a contact. You and your team members can access the contact information when you are working on potential business opportunities.

A contact team is a group of employees or partners who can view the contact information in the My Contacts view. If you work in a Mobile Web Client environment and are a member of the contact team, the contact information is downloaded to your local database the next time you synchronize.

You access different Contacts screen views to perform the following tasks:

- View your own contacts, with information that can include accounts, activities, and opportunities
- Enter information about your contacts, and track your relationships using the My Contacts list
- Search and query using criteria you define to identify contacts associated with accounts or opportunities which you are pursuing

Adding a Contact

To add a contact

1. Navigate to the Contacts screen.

   A contact record only appears on the My Contacts view if you are on the contact team for the contact.

2. From the Show drop-down list, select All Contacts.

3 In the Contacts list, click New, and complete the necessary fields.

If the name includes unsupported characters such as an apostrophe (‘), an error message appears.

Click the show more button to display additional fields in the More Info form.

The following table describes fields in the Contact form.

Field	Comments
Account	Displays the account with which the contact is associated.
Address Line 1	Displays the primary address for the associated account.
Comments	A text field that shows any additional information associated with the contact.
Contact Method	A list of values established by your company that is used to define the contact’s preferred method of interaction. Default values include Email, Fax, Pager, and Phone.
Contact Team	A default value based on your user ID. After you create a contact, you are automatically listed as the primary team member. You can add individuals to the contact team by selecting them from the employee list. Only a manager or administrator can change the primary contact team member, or can delete the primary contact team member.
Disable Cleansing	A check box which, when selected, does not allow data cleansing.
Employee Flag	If checked, this flag indicates that the contact is an employee of your company.
First Name	A required field that displays the contact’s first name.
Global Owner	Displays the name of the team member who is the global account owner. In cases of multinational or global companies, this designates one main account team member to oversee the account.
Job Title	A text field that displays the contact’s professional title.
Last Name	A required field that displays the contact’s last name.

Field	Comments
Lock Assignment	A check box which, when selected, locks the contact team assignment from reassignment by Siebel Territory Assignment Manager, MidMarket Edition.
Manager Last Name	Displays the manager’s last name. This field must be populated before you can perform an organizational analysis. For more information, see Chapter 4, “Opportunities.”
Middle Initial	An optional field that displays the contact’s middle initial.
Never Call	A check box which, when selected, indicates that the contact should not be telephoned as a method of contact.
Never Email	A check box which, when selected, indicates the contact does not want to receive email.
Never Mail	A check box which, when selected, indicates that the contact does not want to receive mail from your company.
Organization	A default value displaying the name of the organization to which you belong. Your system administrator sets up organizations in your Siebel application. You can associate multiple organizations with an opportunity, but your organization is listed as the default organization.
Send Email Updates	A check box which, when selected, indicates that the contact is willing to receive email updates about products and services.
Status	Examples are Active, Qualified, Marked for Deletion.
Sync	A read-only check box, which indicates the user has included the contact record in the user’s Sync List. Requires Siebel Sync.
Sync List	A dialog box that displays the User IDs of users who synchronize the contact with a personal information manager (PIM) such as Lotus Notes or Microsoft Outlook. Requires Siebel Sync.
Time Zone	Displays the time zone in which the contact works or lives.

Associating a Contact with an Account

A contact can be associated with one or more accounts, although the contact is designated as the primary on only one account. Use the Accounts view to list accounts associated with a contact.

To associate a contact with an account

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact, and then click the Accounts view tab.
3. In the Accounts list, click New.
4. In the Add Accounts dialog box, select the account associated with the contact, and then click OK.

   In the Add Accounts dialog box, click New to add a new account.

Associating a Contact with an Opportunity

A contact can be a source of revenue for your company. Potential revenue-generating events are called opportunities. You associate a contact with an opportunity to track information about both the opportunity and the contact.

To associate a contact with an opportunity

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact, and then click the Opportunities view tab.
3. In the Opportunities list, click New.
4. In the Add Opportunities dialog box, select the opportunity to associate with the contact, and then click OK.

Associating Attachments with a Contact

An attachment is a file created in another application that you can associate with a contact record. You attach documents to contact records to maintain an interaction history for the contact or the opportunity. Attachments can include email correspondence, pending contracts, and product data sheets. Associating attachments with a contact record allows the sales team to share information about the contact.

To associate an attachment with a contact

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact, and then click the Attachments view tab.
3. In the Attachments list, click New.

   The Update File check box is automatically selected as a default. If you do not want the attached file automatically updated as the source file changes, clear the check box.
4. In the Attachment Name field, click the select button.
5. In the Add Attachment dialog box, click Browse.
6. In the Choose File dialog box, select the file, and then click Open.
7. In the Add Attachment dialog box, click Add.

   The attachment appears in the Attachments list.

Promoting a Contact

Contact records can be promoted from the My Personal Contacts view to the My Contacts view.

To promote a contact from My Personal Contacts to the My Contacts

1. Navigate to the Contacts screen.
2. From the Show drop-down list, choose My Personal Contacts.
3. In the Contacts list, select the contact for promotion.
4. In the Contact form, click the show more button to display additional fields.
5. In the Contact form, clear the check box in the Private field.

   The Contact record appears in the My Contacts list.

NOTE: You cannot designate a contact as Private (My Personal Contacts) from the My Contacts list.

Creating a Profile for a Contact

A profile consists of information that you collect about a contact. This information can include a contact's expenditure approval, hobbies, education, and the name of the contact's spouse.

To create a profile

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact, and then click the Profile view tab.
3. In the Profile form, complete the fields.

Adding a Contact to a Sync List

A contact can be added to a list for synchronization with a personal information manager (PIMs) such as Microsoft Outlook, using Siebel Sync. For more information about synchronizing contacts, see *Siebel Sync Guide, MidMarket Edition*.

To add a contact to a sync list

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact to be added to the Sync List.
3. Click the menu button, and then select Add to Sync List.

   A check mark appears in the Sync check box in the Contact form.

   A contact can also be added to a different Sync List by clicking the select button in the Sync List field in the contact form.

To remove a contact from a sync list

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact to be removed from the Sync List.
3. Click the menu button, and then select Remove from Sync List.

   The check mark is removed from the Sync check box in the Contact form.

Updating Contact Information in External Systems

If your Siebel administrator has set up real-time integration of contacts between Siebel Sales and a back-office system or other systems in your organization, you can use the Update External System command to send new and modified contact information from Siebel Sales to another system.

This Application Services Interface (ASI) feature allows you to initiate a real-time contact data update between Siebel and external system, maintaining consistent customer information across the enterprise and eliminating manual entry of customer data in multiple systems.

The Update External Systems command can also be used to synchronize account data with external systems. For more information, see "Updating Account Information in External Systems" on page 38.

This procedure assumes that your Siebel administrator has completed the work necessary to allow real-time contact integration through ASI. For information about how to set up the Web services administration to communicate with the external system, ASI structures, configuring and customizing the ASI, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition* and *Applications Administration Guide, MidMarket Edition*.

To update contact information in an external system

1. Navigate to the Contacts screen.
2. In the Contacts list, click New.
3. In the new contact record, complete the fields.
4. (Optional) Click the Accounts view tab.
5. (Optional) In the Accounts list, click New, and then complete the fields to associate an account with the contact.
6. In the Contacts list click the menu button, and then choose Update External System.

Accounts 3

This chapter explains how sales professionals can use the Accounts screen to create new customer accounts, modify and add account information for existing customers, respond to customer inquiries, and view account information.

Accounts Overview

An account represents the relationship between your company and the companies or individuals with whom you conduct business. You use the Accounts screen and its associated views as the primary navigation tool for customer interactions.

Business Scenario

At a vendor site, a sales representative meets a prospect. After a brief discussion, the sales representative determines that the prospect is interested in learning more about the products and services that the sales representative's company sells. The sales representative sets up a sales call with the prospect later in the week.

During the sales call, the sales representative asks a number of questions to determine the account structure of the prospect's business and to decide how best to meet the prospect's needs.

The sales representative learns that the prospect's business has four locations, and that each service is billed through the main office, and each location receives a billing statement.

After the meeting, the sales representative returns to the office and begins creating the account structure for the prospect's business.

Account Procedures

When you identify a possible lead, the lead can be added to your Siebel application as an account. You can then begin to add and track information about the account.

You can access different Accounts screen views to perform the following tasks:

- View your own accounts, with information that can include contacts, activities, profile, and opportunities
- Enter information about your accounts and track your relationships through the My Team's Accounts list
- Search and query on criteria you define to help identify accounts that are potential opportunities

Creating an Account

After you have identified a business relationship, you can enter the details about the account in your Siebel application. As you gain additional information, or as account details evolve or change, you can update the account information. Before adding a new account, search the accounts list to make sure the account does not already exist.

To create an account

1. Navigate to the Accounts screen.
2. In the Accounts list, click New, and then complete the fields for the new account.
3. In the Account More Info form, click the show more button and complete additional fields as needed.

   The following table describes fields in the Account form.

Field	Comments
Account Type	A list of values established by your company defines the type of account. Default values include Commercial, Competitor, Consultant, and Customer.
Assignment Area Code	Displays an area code for the account. This indicates that a sales representative from the same area code should be assigned to the account.

Field	Comments
Assignment Country Code	Displays a country code for the account. This indicates that a sales representative from the same country code should be assigned to the account.
PO Auto-Approval Limit	The amount for which a Purchase Order can be automatically approved.
Competitor	A check box which, when selected, indicates the account is a competitor.
Current Volume	Displays a monetary amount that represents the account's current sales volume.
Disable Cleansing	A check box which, when selected, does not allow data cleansing.
Domestic Ultimate DUNS	Displays the DUNS number for the domestic ultimate, which is the highest member in the hierarchy for the same business entity within the same country. A case can be its own domestic ultimate.
DUNS#	The Data Universal Numbering System (DUNS) numeric serial number for a company. The DUNS number is unique for each company.
Expertise	A list of values established by your company that defines the area of expertise for the account. Default values include Technology, Quality Control, and Client Management.
Global Owner	Displays the ID of the team member who is the global account owner. In cases of multi-national or global companies, this designates one main account team member to oversee the account.
Global Ultimate DUNS	Displays the DUNS number for the global ultimate, which is the highest member in the hierarchy for the same business entity worldwide.
Inventory Location	Displays the physical location of the inventory.
Lock Assignment	A check box which, when selected, locks the sales team assignment from reassignment by Siebel Territory Assignment Manager.
Name	A required value that identifies the account.
Organization	Displays the name of the organization with which the account is associated in your Siebel application.

Field	Comments
Parent	Displays a parent account if the account is a subsidiary of a larger company.
Parent/HQ DUNS	D&B number for the account's parent account.
Partner	A check box which, when selected, indicates the account is a business partner.
PO Approval Limit	Displays a monetary limit up to which a PO is approved.
PO Approved	A check box which, when selected, indicates the Purchase Order (PO) has been approved.
Potential Volume	Displays a monetary amount that represents the account's potential sales volume.
Price List	Displays a price list associated with the account. Your application administrator establishes price lists based on criteria defined by your company.
Shipping Information	A text field for additional shipping details.
Shipping Terms	A list of values established by your company that defines the terms for shipping. Default values include Due, FOB, TBD, and No Charge.
Stage	A list of values established by your company that defines the account stage according to your sales or other methodology. Default values include Project Planning and Strategy, Analysis and Design, Testing and Production Pilot, Rollout, and On Hold.
Status	A list of values established by your company that defines the account status. Default values include Active, Contract Pending, Gold, and Inactive.
Synonyms	Displays a synonym for the account.
URL	Displays the Universal Resource Locator (URL) for the account Web site.

NOTE: When a company change names or merges with another company, you must transfer account names and contacts to the new account name. Contact Siebel Technical Support or your implementation team for more information on how to rename an account.

Associating a Contact with an Account

As you continue to work closely with a prospective account, you manage your business relationship with the contacts associated with an account.

NOTE: Contacts can belong to multiple accounts, only one of which can be the primary account.

To associate a new contact with an account

1. Navigate to the Accounts screen.
2. In the Accounts list, select the account, and then click the Contacts view tab.
3. In the Contacts list, click New, and complete the fields for the contact.

To associate an existing contact with an account

1. Navigate to the Accounts screen.
2. In the Accounts list, select the account, and then click the Contacts view tab.
3. In the Contacts list, click Add.
4. In the Add Contacts dialog box, enter query criteria for the contact, and then click Go.
5. Select the contact to add, and then click OK.

To update an external system with an account contact

1. Navigate to the Accounts screen.
2. In the Accounts list, select an existing account, and then click the Contacts view tab.

   To create a new account, see "Creating an Account" on page 31.
3. In the Contacts list, select the contact.
4. In the contact record, drill down on the contact name hyperlink, and then in the contact form, complete any additional fields.
5. In the Contact form, click the menu button and choose Update External System.

Account Activities

An activity is a task or event that is generally, but not always, performed for a contact, an account, or an opportunity. You will most likely attend meetings, calls, and perform other activities associated with an account. You can use the Activities list to enter and track account-related activities. If the activity has a time associated with it, the activity appears in the Activities list and Calendar. For more information, see Chapter 8, “Activities.”

Associating an Account with an Activity

Each account can have multiple activities. Associating accounts with activities helps you keep track of what needs to be accomplished for the account.

An account can have a number of activities associated with it. You can associate an activity with an account to track which activities you have completed and track those you want to accomplish in the future as you manage the account relationship.

To associate an account with an activity

1. Navigate to the Accounts screen.
2. In the Accounts list, select the account associated with the activity.
3. Click the Activities view tab.
4. In the Activities list, click New.
5. In the new activity record, complete the necessary fields.
    a. In the Type field, drill down on the hyperlink for the default value to change the type of activity.
    b. In the Display In field, choose the display method for the activity.

       For example, the activity can appear in Calendar and Activities, To Do and Activities, and Activities Only.

Associating an Opportunity with an Account

Accounts are a source of business for your company. An opportunity is a potential revenue-generating event and the opportunity record stores information that you can use to manage accounts.

To associate an opportunity with an account

1. Navigate to the Accounts screen.
2. In the Accounts list, select the account.
3. Click the Opportunities view tab.
4. In the Opportunities list, click New.

   A new opportunity record appears, with the Account field, and the Primary (team member) field completed. The Close Date field value defaults to the opportunity creation date.

5 Complete the necessary fields for the opportunity.

To display more fields, in the Opportunities list click the menu button and then choose Columns Displayed.

The following table describes fields in the Opportunity form.

Field	Comments
Account	A value inherited from the selected account.
Close Date	Allows you to enter the expected date on which the opportunity closes. The default date is the opportunity creation date. Modify the close date if the opportunity closes on a different date, because this date is used in revenue forecasting.
Name	Displays the name of the opportunity.
Primary	Displays your User ID when you create the opportunity. This value can be changed. For more information see, Chapter 4, “Opportunities.”
Priority Flag	A check box which indicates that an account is a high priority (urgency for sales team). When the priority is set by selecting the check box, a flag appears in the priority column.
Revenue	Allows you to enter the currency amount of the opportunity. This field defaults to zero.
Sales Stage	A list of values established by your company that defines the sales stages associated with the sales method you selected.

NOTE: For more information about Opportunities, see Chapter 4, “Opportunities.”

Updating Account Information in External Systems

If your Siebel Administrator has set up real-time account integration between Siebel Sales and a back-office system or other systems in your organization, you can use the Update External System command to send new and modified account information from Siebel Sales to another system in real-time.

This Application Services Interface (ASI) feature allows you to initiate a real-time account data update between Siebel and external system, maintaining consistent account information across the enterprise and eliminating manual entry of account data in multiple systems.

By default, in the Accounts screen, the Update External System command triggers the business process Synchronize Account ASI. This business process sends account information to the external system, and updates Siebel with the response from the external system. This business process can be viewed by navigating to the Business Processes screen from the Site Map, and querying for the business process name.

The following procedure explains how to send account information from Siebel Sales to another system. The contacts that are associated with the account must sent separately to the external system. For more information, see "Updating Contact Information in External Systems" on page 28.

This procedure assumes that your Siebel Administrator has completed the work necessary to allow real-time account integration through ASI. For information about how to set up the Web services administration to communicate with the external system, ASI structures, configuring and customizing the ASI, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition* and *Applications Administration Guide, MidMarket Edition*.

To synchronize account information with an external system

1. Navigate to the Accounts screen.
2. In the Accounts list, select an account record.

   To create a new account record, see "Creating an Account" on page 31.
3. In the Account list, click the menu button, and then choose Update External System.

Viewing Account Credit Profiles

If your organization uses back-office software or another external credit management system to store customer credit information, you can use the Credit Profile read-only view to get the most current account credit profile information.

The Accounts screen's Credit Profile view allows you to improve employee productivity by providing visibility to complete customer information within your Siebel application, and streamlines the quote-to-cash process by allowing the sales professional to identify potential credit problem early.

This procedure assumes that your Siebel Administrator has completed the work necessary to allow real-time account integration through Application Service Interfaces (ASI). For information about how to set up the Web services administration to communicate with the external system, ASI structures, configuring and customizing the ASI, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition* and *Applications Administration Guide, MidMarket Edition*.

To view account credit profile information

1. Navigate to the Accounts screen.
2. In the accounts list, select the account.
3. Click the Credit Profile view tab.

   The Credit Profile form appears, and includes information on credit status, risk category, credit limit, and so on.

   Fields in this form are read-only, except for the Skip Credit flag check box and Credit Auto Approval Limit.
4. Click Refresh to update the information in the Credit Profile form.

Global Accounts Overview

Available as an option, Global Accounts allow users to see opportunities, activities, contacts, and account team information for an account and its subsidiary accounts. The Global Accounts view tab is accessed from the Accounts screen.

Global Accounts consist of a parent account, the child accounts, the child accounts' children, and so on. These hierarchies are determined in one of two ways:

- Hierarchies are determined by the value in the parent field on the Account Record.
- Hierarchies are determined by the administrator who creates custom hierarchies.

Business Scenario

A large multinational corporation has three major subsidiaries. Each subsidiary has two child companies. The Global Accounts Manager plans to review all opportunities at the multinational company and its subsidiaries.

Account records have already been created for the multinational corporation and its subsidiaries and the company's administrator has already created the Global Account hierarchy.

The Global Accounts Manager navigates to the Accounts screen, and selects the Global Accounts view tab. In this view, the manager can see the opportunities for the multinational corporation and its subsidiaries.

Viewing Global Accounts

Global Accounts are created and maintained by the administrator. If an account has no child account or the administrator has not defined a hierarchy for an account, then a message appears advising you that the selected record is not included as part of your defined hierarchy.

For more information on creating Global Accounts and account hierarchies, see *Applications Administration Guide, MidMarket Edition*.

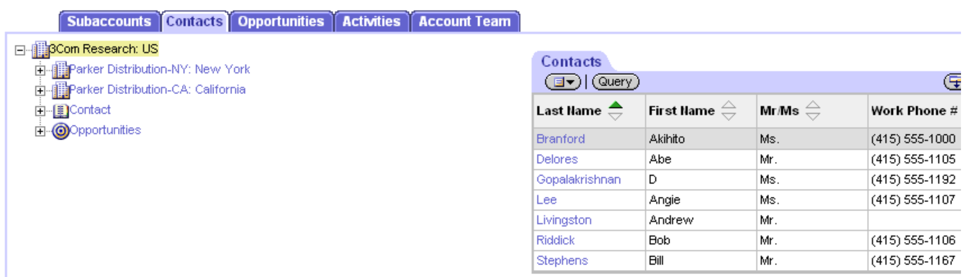
To view global accounts

1 Navigate to the Accounts screen.

2 From the Show drop-down list, choose My Global Accounts.

Other Show drop-down list options include All Global Accounts, and Global Accounts Across Organizations.

The Global Accounts subviews appear, as shown in the following figure, with the explorer at left showing the hierarchy of account, subaccounts, contacts and opportunities, and the list at right showing records associated with each subview.



To view Global Accounts information

- Click the individual view tabs for Subaccounts, Contacts, Activities, Opportunities, and Account Team.

  Records associated with these subviews appear in a list at the right of the explorer.

Opportunities 4

This chapter explains how sales professionals can use the Opportunities screen and its related views to create, qualify, and close opportunities. This helps sales professionals to manage their pipelines and win more deals.

Opportunities Overview

An opportunity is defined as a potential revenue-generating event. The following scenarios are examples of opportunities:

- At a trade show, a company representative expresses interest in purchasing a product.
- A telesales representative calls a contact, and the contact expresses interest in contracting maintenance services.
- In a conversation with an existing client, the client expresses an interest in upgrading to the newest model.

Opportunity-related information is recorded and tracked in the views associated with the Opportunities screen. You can use the Opportunities views to perform the following tasks:

- Receive and respond to new leads that are assigned to you
- Create new opportunities and enter related information such as accounts, contacts, activities, and products
- View, qualify, and update opportunities assigned to you and your sales team (if you are a manager)
- Track the status of an opportunity through the sales cycle from creation to closure
- Share information about the opportunity with sales team members
- Generate quotes and other types of information needed to close the deal

Business Scenarios

The following business scenarios describe how a typical sales representative works with leads and opportunities. Your company may use a different methodology based on your business practices.

Opportunity Lead Conversion

A company uses Siebel Campaigns, MidMarket Edition to develop a campaign as part of a new product introduction. During the campaign, a telemarketing agent uses Siebel Call Center to contact prospects associated with the campaign. During her conversations with prospects, the agent qualifies leads by determining whether each prospect is interested in the new product offering. When a prospect expresses interest in learning more about the new product, the agent creates a new lead.

Using Siebel Territory Assignment Manager the lead is automatically routed to the sales representative who is most qualified to work on the lead and whose schedule can accommodate the new assignment.

When the sales representative log onto the Siebel Sales application, she sees the new lead in the Opportunities list on her home page. Drilling down on the lead takes the sales representative to the Opportunities screen. After reviewing details about the lead, such as the customer information, probability of closing, and the products that the customer is interested in purchasing, the sales representative decides to accept the lead by changing the Status field to Accept.

After the sales representative accepts the lead, she begins to work on the lead by assembling members of the sales team, conducting further research on the customer and its requirements, coordinating and recording activities, uploading agreements, and generating informational material for the customer. As the sales representative works through the sales cycle, she updates information about the sales stage and keeps private notes as well as notes that she shares with other members of the sales team. Eventually, the sales representative develops a quote from the Opportunities screen. When the customer accepts the quote, it is converted into an order.

NOTE: Siebel Campaigns, Siebel Call Center, Siebel Sales, and Siebel Quotes are fully integrated, separately licensed product offerings. You need to license these products to access the views.

Opportunity Tracking

At a trade show, a sales representative meets a prospective customer who could be a lead for a new business opportunity. When the sales representative returns to the office, he discovers the company is listed in Siebel Sales as an account, but the person he met is not listed as a contact.

The sales representative proceeds to add the prospective customer as a contact, and then creates the opportunity. He then schedules meetings and creates associated activities, and enters other potential contacts associated with the opportunity.

As the sales process continues, the sales representative gathers and updates information about the account, its contacts, and the opportunity that he is pursuing. As the relationship grows, the sales representative can add, view, and share stored information and key knowledge with other members of the sales team.

Opportunity Generated Quote

A sales representative is assigned to the sales team for an opportunity. As the sales representative gathers product information about the customer requirements, she enters that information in the Siebel Sales application. After she presents to the customer, the customer indicates that the representative’s company is on the short list for the deal, and that the representative should submit a quote.

The sales representative creates a quote automatically based on the information she has already entered into the Siebel Sales application. After she generates the quote, she synchronizes the quote information with the revenues associated with the opportunity. By making sure these numbers are in sync, the sales representative establishes that the data associated with her opportunity is current and that her forecasts are accurate.

Opportunities Screen Views

The Opportunities Screen includes several views that allow you to create, update, and track opportunities. These views make it easier to find and review relevant opportunities and associated data. For example, you can use the views to access opportunities belonging to you, your team, or your organization.

Table 2 describes each of the views within the Opportunities screen.

Table 2. Opportunities Screen Views

View	Description
All Opportunities	Displays opportunities whose organization is the same as the organization of the user. The user may or may not be on the sales team for these opportunities.
All Opportunities Across My Organizations	Displays opportunities which have an organization or a suborganization that is the same as the user's organizations.
All Opportunities Across Organizations	Displays opportunities for all organizations. Typically only select users have access to this view.
Explorer	This view makes it easier to visualize the relationship of records that have been added to each opportunity. For each opportunity, you can view associated child opportunities, contacts, products, partners, quotes, activities, and notes.
Manager’s Explorer	Gives managers a view of their team’s opportunities by team member.
My Opportunities	Displays opportunities for the user’s sales team.
My Team’s Opportunities	This manager’s view displays opportunities associated with either the manager’s sales team or the sales team of one of his team members.

NOTE: The views in Table 2 (except for the Manager’s Explorer view) are based on a default predefined query (PDQ) shown in the Queries drop-down list. The PDQ is labeled * Current Opportunities. Only opportunities that have a Close Date within the last 30 days or in the future (> = Today’s Date - 30 days) appears in the view. Opportunities without a primary sales representative or an unspecified organization do not appear in the views. The administrator can access these opportunities from the Site Map > Data Administration > Opportunities view.

Other Views Associated with the Opportunities Screen

Several view tabs are frequently associated with the Opportunities screen. Table 3 provides an explanation of each view. Some of these views only appear if you have purchased optional add-on modules. Views included in add-on modules are indicated by an asterisk (*).

Table 3. Views Associated with the Opportunity Screen

Opportunity Screen Associated Views	Comments
Activities	Allows sales professionals to identify and track activities required to win the deal. Examples of activities are customer calls and team meetings. Activities can also be viewed in the Calendar and To Do views. For more information see Chapter 8, "Activities."
Activity Plans	Provides templates predefined by the administrator that identify a set of activities that should be completed. Activity Plans help sales managers to indicate required activities and also saves time for sales professionals because the activities are automatically generated based on the selected template. For more information see Chapter 8, "Activities."
Attachments	Allows sales professionals to associate relevant documents with the opportunity. An example is a Microsoft Word Request for Proposal document.
Audit Trail	Allows users to track changes that have been made to an opportunity record. Any time a member of the opportunity sales team creates, updates, copies, or deletes opportunity data, the action is tracked in the Opportunity Audit Trail view. Audit Trail details which employees made the modifications and when these changes were made. Changes to the Revenue Class, Probability, Stage, Stage ID, and Status fields are automatically tracked. Your administrator can help you set up change tracking for additional fields. For more information, see *Applications Administration Guide, MidMarket Edition*.
Calendar	A Calendar format view that shows activities associated with the opportunity.
Campaign Leads*	Primarily used by call center agents to record a campaign response that represents a sales opportunity. See *Siebel Call Center User Guide, MidMarket Edition* for more info.

Table 3. Views Associated with the Opportunity Screen

Opportunity Screen Associated Views	Comments
Categories	Allows you to sort and track information related to the opportunity. For more information, see Chapter 12, "Categories."
Charts	Allows you to view graphical analyses of opportunity data.
Competitors	Allows you to track competition in the deal. For more information, see Chapter 6, "Competitors."
Contacts	Allows you to maintain list of key customer contacts in the opportunity.
Messages	Allows you to associate phone messages with the opportunity. For more information, see Chapter 9, "Messages."
More Info	Used to create, update, and track the status of opportunities.
Notes	Allows you to create private notes or public notes that can be shared with your sales team.
Organization Analysis	Allows you to analyze key contacts and relationships in the opportunity and display them graphically in an organization chart.
Organizations	Allows you to view organizations associated with the selected record.
Partners	Allows you to add partners who can help you win the opportunity.
Products	Allows you to associate products with the opportunity.
Profile	Allows you to capture key info to qualify the deal. You can attach a SmartScript to support this view. For more information, see *Siebel Call Center User Guide, MidMarket Edition*.
Projects*	Allows you to create projects to track activities and resources for the opportunity. For more information, see *Siebel Professional Services Automation Guide, MidMarket Edition*.
Quotes*	Allows you to automatically generate a quote for the offering. For more information, see Chapter 13, "Quotes."
Revenue Plans*	Allows you to develop revenue plans. For more information, see *Siebel Forecasting Guide, MidMarket Edition*.
Revenues*	Allows you to forecast revenue. Fore more information, see *Siebel Forecasting Guide, MidMarket Edition*.

Table 3. Views Associated with the Opportunity Screen

Opportunity Screen Associated Views	Comments
Sales Team	This read-only view allows you to see who is on the sales team for the opportunity.
Strategic Selling*	Includes views that support the Strategic Selling Opportunity Management methodology developed by Miller Heiman, Inc. For more information, see Chapter 15, "Strategic Selling."
Target Account Selling*	Includes views that support the Target Account Selling Opportunity Management methodology developed by Siebel MultiChannel Services. For more information, see Chapter 14, "Target Account Selling."
Transfer	Used to reassign an opportunity to a partner.

Opportunities Processes and Procedures

When you are working with opportunities, you perform a number of key tasks. The following tasks are described in this section:

- Lead assignment
- Lead response
- Lead qualification, sales method and stage
- Creating an opportunity
- Changing a primary team member
- Monitoring significant transactions
- Associating a contact with an opportunity
- Associating an activity or activity plan with an opportunity
- Associating a product with an opportunity
- Creating a quote from an opportunity
- Performing an organization analysis
  - Creating an organization analysis
  - Using drag and drop hierarchy to depict structure
  - Updating contact information for analysis
  - Viewing and printing the organization analysis
- Adding attachments to opportunities
- Adding notes to opportunities
- Viewing charts and reports

Lead Assignment

You can view new leads in the Opportunities list on your home page, or you can navigate to the Opportunities screen to view new leads that you did not create but were assigned to you. There are a number of ways in which a lead might be assigned to you:

- A lead is generated through a campaign, and then automatically routed to you using Siebel Territory Assignment Manager and predefined rules.
- A lead is entered into the system by an administrator, and then automatically routed to you using Siebel Territory Assignment Manager and predefined rules.
- An opportunity is created by a sales manager or sales representative who adds you to the sales team.

In each of these scenarios, you are able to view the lead or opportunity because you have been added to the sales team, either as the primary on the sales team or as a sales team member. If you are receiving a lead for the first time and you are the primary on the sales team, the Status field in the More Info view is set to Pending by default. You can accept, reject, or reroute the lead by changing the value in the Status field.

If the administrator has activated the email notifications, predefined processes send email messages to you, alerting you of the following events.

- You have received a new lead and should accept, reject, or reroute the lead within seven days.
- You received a new lead five days ago and should accept, reject, or reroute the lead within two days.
- You have accepted a lead but have not worked on the lead in 30 days.
- You have won the sales opportunity and should enter the reason in the system.
- You have lost the sales opportunity and should enter the reason in the system.

The wording of the emails and the wait periods can be modified. Opportunity Workflows only sends email if the opportunity has revenue greater than $50,000. For more information, see the Opportunity Workflows chapter in *Applications Administration Guide, MidMarket Edition*.

Lead Response

After you receive a lead, you can choose to accept, reject, or reroute the lead.

- **Rejecting the Lead.** You can reject a lead by changing the Status field to Reject in the More Info view. Enter the reason for rejecting the lead in the Reason field. The lead remains in your queue until it is reassigned by your manager.
- **Rerouting the Lead.** If you decide to reroute a lead by changing the Status field in the More Info form to Reroute, a Reroute activity automatically is created. Enter the reason for rerouting the lead in the Reason field. The lead remains in your queue until it is rerouted by your manager.
- **Accepting the Lead.** You can accept a lead by changing the Status field in the More Info form to Accept. Enter the reason for accepting the lead in the Reason field.

Lead Qualification, Sales Methods and Stages

When you accept a lead, you can begin to work on the lead in the Opportunities screen. The records in the Opportunities list include both leads and opportunities. Leads are defined as opportunities that have not yet been qualified.

Lead qualification status is indicated in the Sales Stage field. The list of values in the Sales Stage field varies depending on which sales method you are using.

A sales method is a formalized approach or methodology used during the sales process. A sales method can encompass all activities associated with the sales process, from prospecting to forecasting to closing deals. This approach allows sales representatives to use the method most appropriate for their opportunities.

The application administrator establishes values in your Siebel application that represent the sales methods and sales stages for your company. It is a recommended business practice to designate a default sales method in your Siebel application. This practice allows a sales method to be associated with each opportunity and aids in charting and reporting accuracy.

Sales methods can differ within a company. For instance, a sales method for managing a complex multimillion dollar opportunity can include 15 stages, while a sales method for a simple low-dollar opportunity may require only four stages.

Your application administrator creates and implements the sales stages that your company uses. For more information about creating or implementing sales stages, see *Applications Administration Guide, MidMarket Edition*.

Table 4 shows sales methodologies (Accelerated, Default, Standard, Strategic Selling), and the associated sales stage for each methodology (for example, 01 - Prospecting). The table also shows if the record is a lead or is an opportunity at each sales stage.

Table 4. Sales Methods and Sales Stages

Accelerated	Default and Standard	Strategic	Lead or Opportunity
01 - Prospecting	01 - Prospecting	01 - Universe	Lead
	02 - Potential Lead	02 - Above	Lead
02 - Qualification	03 - Qualification	03 - In the Funnel	Opportunity
	04 - Opportunity	04 - Best Few	Opportunity
	05 - Building Vision		Opportunity
	06 - Short List		Opportunity
	07 - Selected		Opportunity
03 - Closing	08 - Negotiation	05 - Won	Opportunity
	09 - Closed or Won		Opportunity
04 - Lost	09 - Closed or Lost	00 - Lost	Opportunity

Creating an Opportunity

Each time you identify an opportunity, you should create a new record.

To create an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, click New.

   A new record appears, containing default values for some fields.

3. In the More Info form, click the show more button.
4. Complete the necessary fields.

   The following table describes some fields in the Opportunity form.

Field	Comments
Account	Allows you to associate an opportunity with an account.
Address Line 1	Allows you to associate an address with an opportunity. If the account has more than one address associated with it, you can select the appropriate address for the opportunity.
Best Case	Allows you to enter the currency amount the deal could generate in the best-case scenario. This amount is higher than the value in the Revenue field.
Channel	A list of values established by your company that defines the sales channel. Default values include Direct and Indirect.
Close Date	Allows you to enter the expected date on which the opportunity closes. The default date is the same as the Created Date. It is important to modify the date, if the opportunity closes on a different date, because this date is used in revenue forecasting.
Committed	A check box which, when selected, indicates there is a high probability that the deal will close, and that the deal should be included in your revenue forecast.
Cost	Expense associated with the opportunity.

Field	Comments
Created	A default value that displays the date and time you created the opportunity.
Created By	A default value based on the user ID of the employee who created the opportunity.
Description	A text area for additional information about the opportunity.
Domestic Ultimate DUNS	Displays the DUNS number for the domestic ultimate, which is the highest member in the hierarchy for the same business entity within the same country. A case can be its own domestic ultimate.
DUNS#	The Data Universal Numbering System (DUNS) numeric serial number for a company. The DUNS number is unique for each company.
Executive Priority	This check box can be used to flag a significant opportunity. Sales executives can query for high-priority opportunities for tracking purposes.
Expected value	Displays a currency value that is calculated based on the potential revenue field multiplied by the value in the probability field. A lower percentage in the probability field reduces the expected value that is included in your revenue forecast.
Global Ultimate DUNS	Displays the DUNS number for the global ultimate, which is the highest member in the hierarchy for the same business entity worldwide.
Lead Partner	The lead partner field is populated automatically when the source of the opportunity is a campaign with a lead partner. If you create an opportunity from a response, and the response had a campaign associated with it, the opportunity inherits the lead partner from the campaign. If you create a new opportunity and select a campaign as the source, the opportunity inherits the campaigns lead partner, if it has one.
Lead Quality	A list of values established by your company that allows you to rank the quality of the lead. Default values include 1-Excellent, 2-Very High, 3-High, 4-Fair, 5-Poor.

Field	Comments
Lock Assignment	A check box which, when selected, locks the sales team assignment so that Siebel Territory Assignment Manager does not alter the current opportunity assignment.
Margin	A calculated field that displays the revenue figure minus the cost.
Name	A required value that identifies the opportunity.
Opportunity Currency	A list of values established by your company that allows you to specify the currency type associated with the opportunity.
Organization	A default value that displays the organization name associated with the person creating the opportunity. Your system administrator sets up organizations in your Siebel application. You can associate multiple organizations with an opportunity.
Parent HQ DUNS	Displays the DUNS number of the parent organization's HQ location, if this is a subsidiary record.
Parent Opportunity	Allows you to associate an opportunity with a parent opportunity. For instance, if you are working a sale for a division of a company in which there are numerous opportunities, you may associate this opportunity with a larger parent opportunity for the entire company.
Partner Approval Status	A list of values established by your company that allows you to specify the approval status of the lead partner for the opportunity.
Primary	Displays the user ID of the primary sales team member. This value defaults to your user ID if you are creating a new opportunity.
Priority	A check box which, when selected, indicates that an opportunity is a high priority (urgency for sales team). When the priority is set to Y, a check mark appears in the priority column. This column can appear in the Opportunities list and the Opportunities Explorer. The default value for this column is N.

Field	Comments
Probability %	The Probability reflects the percentage of confidence you have that the deal will close with the specified revenue on the specified close date. By default, the probability adjusts automatically based on the sales stage of the opportunity. You can manually override the probability value.
Reason	A list of values established by your company that allows you to specify a reason that the opportunity was accepted, rejected, rerouted, won, or lost.
Revenue	Allows you to enter the currency amount of the opportunity. If you are using the Products, Quotes or Revenue view tabs, you can make sure your summary revenues are calculated and are in sync.
Revenue Class	A list of values established by your company that allows you to define the quality of the expected revenue. For more information, see "Revenue Class and Revenue Type" on page 59.
Revenue Type	A list of values established by your company that allow you to define the kind and source of the expected revenue. For more information, see "Revenue Class and Revenue Type" on page 59.
Sales Method	A list of values established by your company that includes the sales methodologies. Default values include Strategic Selling, Accelerated Sales Process, Default Sales Methodology and Standard Sales Process.
Sales Stage	A list of values established by your company that allows you to specify the sales stages associated with the selected sales method.
Sales Team	This list shows who is on the sales team for the opportunity. When you create an opportunity, you are automatically listed as the primary sales team member. You can add employees to the sales team by selecting them from the employee list. Only a manager or administrator can change or delete the primary sales team member.
Site	A default value that is automatically entered when you associate the opportunity with a specific account and location.

Field	Comments
Source	A dialog box that allows you to associate the sources of the sales lead with the opportunity. Typical source values include specific events, campaigns, or conferences.
Source Type	A default value that displays the category of the primary source. For instance, a specific seminar that is the source of the opportunity is identified with a value of Seminar in this field.
Split Flag	A system populated check box that indicates a split revenue record has been created.
Status	A list of values established by your company that describes the status of the opportunity. The Status field is Pending by default. A user can change the field to Accepted, Rejected, Rerouted, Won, or Lost.
Territories	A default value based on the territories defined by your company. Your system administrator controls the territory assignment function set up by your sales manager.
Worst Case	Allows you to enter the currency amount the deal could generate in the worst-case scenario. This amount is lower than the value in the Revenue field.

Revenue Class and Revenue Type

Revenue Class and Revenue Type fields appear on both the Opportunity and the Revenue forms. These two fields are the same fields in the database, and they are linked through a database join, which means changes made in the Opportunity form are reflected on the Revenue form and changes made in the Revenue form appear in the Opportunity form.

The Revenue Class and Revenue Type lists of values are based on the internal business process for each company. The standard values can be adapted to your business, or the lists of values changed by your application administrator to reflect the stages of your company's sales process and the manner in which your company recognizes revenue.

Revenue Class Field

Your company can define the quality of the revenue at a given time by setting the list of values in the Revenue Class field to reflect the sales stages you use. Sample values are Pipeline, Upside, Expected, Committed, and Closed.

Revenue Type Field

Your company may want to differentiate between kinds of revenues and their sources. For instance, your company may classify revenue by Software, Consulting, and Hardware categories, or by Booked versus Billed revenue, which are defined in the list of values. Defining revenue types allows you to query revenues or view charts sorted by the category of the revenue.

For more information, see *Applications Administration Guide, MidMarket Edition*.

Changing a Primary Team Member

The administrator or manager of the primary sales representative can change the person assigned as the primary member of the sales team.

To change a primary team member

1. Navigate to the Opportunities screen.
2. From the Show drop-down list, choose My Team’s Opportunities.
3. In the Opportunities list select the opportunity, and then click the More Info view tab.
4. In the More Info form click the select button in the Sales Team field.
5. In the Team Members dialog box select the team member to assign, and then select the Primary check box.
6. Click OK.

Monitoring Significant Transactions

Sales executives can monitor significant opportunity transactions by querying for opportunities flagged as Executive Priority. These flagged opportunities can be tracked by the executive team regardless of the revenue or forecast commitment. Tracking high-priority opportunities helps the executive maintain the most accurate quarterly revenue forecast and plan involvement in the most promising opportunities.

To flag an opportunity as an executive priority

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. In the Opportunities list, click the menu button and choose Columns Displayed.
4. In the Columns Displayed dialog box, move Executive Priority and Executive Priority Date from the list of Available Columns to the list of Selected Columns, and then click Save.

   The fields appear in the record for the selected opportunity.
5. In the opportunity record, click the check box in the Executive Priority field.

   The Executive Priority Date field automatically shows the current date after the Executive Priority flag is checked.

Associating a Contact with an Opportunity

As you work with an opportunity, you want to maintain information about the contacts associated with the opportunity. For more information about contacts, see Chapter 2, “Contacts.”

The Opportunity screen’s Contacts view allows you to store and review contact-related information for an opportunity.

To associate a new contact with an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Contacts view tab, and in the Contacts list click New.
4. In the new record, complete the fields.

To associate an existing contact with an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Contacts view tab, and in the Contacts list click Add.
4. In the Add Contacts dialog box, enter query criteria for the contact, and then click Go.
5. Select the contact or contacts you want to add, and then click OK.

NOTE: To select a sequence of contact records, hold down the SHIFT key and click the contact records. To select multiple contacts that are not in sequence, hold down the control key and click the contact records.

Activities or Activity Plans Associated with an Opportunity

The Opportunities screen's Activities view allows you to track activities at the opportunity level, maintain a calendar and to-do list for the opportunity, and delegate activities related to the opportunity to your sales team. For more information about Activity Plans and associated activities, see *Applications Administration Guide, MidMarket Edition* and Chapter 8, "Activities."

Associating a Product with an Opportunity

Specific products can be associated with an opportunity. For example, if a customer is interested in purchasing a new software suite, this information can be specified in the Products view.

After the product is associated with the opportunity, you can drill down on the product to review additional information such as product features and prices.

Later, this data can be used when you are building a quote based on the opportunity.

To associate a product with an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Products view tab, and in the Products list click New.
4. In the new record, click the select button in the Products field.
5. In the Pick Product dialog box, enter product criteria and then click Go.
6. Select the product and then click OK.

   The product appears in the Opportunity Products list.
7. Complete the remaining fields, as needed.

   After the product record is saved, you can drill down on the hyperlink in the Product field to view Product details such as Key Features and Product Images.

Creating a Quote from an Opportunity

Using the Quotes view, you can automatically create and revise quotes for the opportunity. For more information, see Chapter 13, "Quotes."

To create a quote from an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select an opportunity.
3. Click the Products view tab.
4. In the Products list click New, and then add a product.

   For more information, see "Associating a Product with an Opportunity" on page 62.
5. In the Product record, complete the fields.
   - **a** Enter the number of product units the customer is interested in purchasing
   - **b** In the Auto Quote field, select the check box to display a check mark.

6. Click the Quotes view tab, and then in the Quotes list click Auto Quote.

   A quote record is automatically created, with some fields completed and a status of In Progress.

   If a price list is associated with the account, the Price List field is automatically completed. If no price list is associated, in the Price List field click the select button and choose a price list. For more information on price lists, see *Pricing Administration Guide, MidMarket Edition*.

7. In the quote record, drill down on the hyperlink in the Name field.

   You can change the system-generated name for a name that is more meaningful in the quote details form.

8. In the quote's Line Items list, add line items, and then click the menu button and choose Reprice.

   The Reprice function makes sure that the quote total reflects the prices from the price list, and multiplies those prices by the quantities that you enter in the products view.

9. In the Quote form, click the menu button and choose Update Opportunity, and then return to the Opportunity form.

   The Update Opportunity function verifies that the opportunity's revenue line items are in sync with the quote line items.

   Use the History icon or the threadbar to navigate back to the Opportunity form.

To update opportunity revenues

1. In the Opportunity list, select the opportunity and then click the Revenues view tab.

2. In the Revenues list choose List from the Revenues drop-down menu.

3 In the Revenues list, click the menu button and choose Update Opportunity.

Update Opportunity makes sure that your summary level revenues equal the sum of your revenue line items.

After this process is completed, the revenue amounts that appear in the Products, Revenues, and Quotes views are synchronized and the Opportunity's Revenue field displays a calculated sum of the individual revenue line items associated with the opportunity.

NOTE: Siebel Quotes is a separately licensed product offering. You cannot access the Quotes view tab if you have not licensed this product.

Organization Analysis

You can automatically create organization charts to help you analyze your key contacts and develop your relationship strategy to win the opportunity.

Creating an Organization Analysis

Siebel Sales automatically generates organization charts based on contacts associated with each opportunity. When you update contact information, your changes are reflected in the organization chart.

To add existing contacts to the organization analysis

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity for the Organization Analysis.
3. Click the Organization Analysis view tab.
4. In either the default Organization Analysis chart view or in the Contacts list (toggle view), click New.

   The Add Contacts dialog box appears.

5. Select one or more contacts to add and then click OK.

NOTE: You can select sequential contacts by holding down the SHIFT key while selecting the contact records.

To create new contacts for the organization analysis

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity for the Organization Analysis.
3. Click the Organization Analysis view tab.
4. In either the default Organization Analysis chart view or in the Contacts list (toggle view), click New.
5. In the Add Contacts dialog box, click New.

6 In the new contact record enter the contact information in the fields, and then click Save.

NOTE: If you create a new contact directly from the Organization Analysis chart view, then an explicit Save is required to update the chart.

The Level of Influence value determines the degree of shading that appears in the Contact node in the Organization Analysis chart. The following table details values and shading.

Value in Level of Influence Fields	Shading on Organization Chart
Low	None
Political Structure (Medium)	Light gray
Inner Circle (High)	Dark gray

You can update contact information from either the Opportunities screen or from the Contacts screen.

Using Drag and Drop to Depict Organization Hierarchy

From the Organization Analysis chart view you can drag and drop contacts to indicate professional relationships within the organization.

To create the hierarchy

1 Navigate to the Opportunities screen.

2 In the Opportunities list, select the opportunity for the Organization Analysis.

3 Click the Organization Analysis view tab.

4 Add or create contacts, as described in "To add existing contacts to the organization analysis" on page 66 and "To create new contacts for the organization analysis" on page 66.

In the Organization Analysis chart area the nodes (boxes) appear for each of the contacts you have analyzed and associated with the opportunity.

5 Select the contact node and drag it beneath the contact node that depicts the contact's manager.

When you drop the contact node on its manager's node, a formal line between the nodes appears, reflecting the reporting relationship.

6 Repeat Step 5 for each contact until you have completed the organization chart.

NOTE: The reporting relationships are also stored in the Contacts list (toggle view). The Manager's Last Name and Manager's First name fields of the contact automatically populate based on the drag and drop actions. To expose this information in the contacts list, click the menu button, and then choose Columns Displayed.

Drawing Lines of Influence

You can also map the politics in the customer organization by identifying informal lines of influence between contacts. Mapping informal lines of influence helps you identify contacts who are not highly ranked (and are easier to access) but who have significant influence on key decision makers. Lines of Influence information is automatically updated in the Contacts screen's Relationships view. You can add Lines of Influence information in the Relationships view if you prefer.

To draw lines of influence

1 In the Organization Analysis chart area, select the contact node, and simultaneously hold down the CTRL key.

2 Drag and drop the selected contact on other contacts to draw the lines of influence.

The CTRL key must be depressed throughout this process in order for the informal line of influence to appear.

To delete lines of influence

- In the Organization Analysis chart area, select the line and press the DELETE key.

  You may also right click the mouse in the Organization Chart area, and choose Edit > Delete from the menu.

Viewing and Printing the Organization Analysis

After you associate contacts with an opportunity and enter values for the manager, reports, associates and the influence level for each, you can view an organization chart of all your contacts.

To view the Organization Analysis chart

1. Navigate to the Opportunities screen.
2. In the Opportunities list select the opportunity.
3. Click the Organization Analysis view tab.

   The Organization Analysis list of contacts appears.
4. From the drop-down list, choose Organization Analysis.

   An organization chart appears with the contact information you entered.

   Each contact appears in a hierarchy based on the influence level or managerial structure assigned to the contact.

NOTE: Double-click the contact node to navigate to the Contacts screen's Activities view to add follow-up activities for the contact.

To print an Organization Analysis chart

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity for which you want to view the Organization Analysis.
3. Click the Organization Analysis view tab.

   The Organization Analysis list of contacts appears.
4. From the drop-down list, choose Organization Analysis.
5. Right click the mouse in the Organization Analysis chart workspace, and choose Print from the menu.

   You can adjust the zoom level at which you want to print the Organization Chart. Large charts print across multiple pages.

Adding Attachments to Opportunities

The Attachments view allows you to associate relevant files such as strategic information documents that other sales team members can use as they work this opportunity.

To add attachments

1. Navigate to the Opportunities screen.
2. In the Opportunities list select the opportunity, and then click the Attachments view tab.
3. In the Attachments list, click New.
4. In the new record, click the select button in the Attachment Name field, and in the Add Attachments dialog box, click Browse to navigate to the file.
5. In the Choose File dialog box, locate the file and then click Open.

   The file name and path appears in the Add Attachments dialog box.
6. In the Add Attachments dialog box, click Add.

   The Attachment name, size, type and modified fields are automatically completed for the record, and the Update File field is checked.
7. In the Comments field for the attachment record, enter a description of the attachment.

Adding Notes to Opportunities

You can add private notes, or public notes that are shared with members of the sales team using the Notes view tab.

To add private and public notes to the opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity and click the Notes view tab.
3. In the Notes list, choose Public or Private from the drop-down menu to specify a private note or one that is shared.

4 In the Notes list, click New, and complete the fields for the new record.

The Created By field is automatically completed with the creator's User ID.

a In the Type field, select the note type.

Examples of note types are legal, reference, and directions.

b In the description field, enter the note text.

Opportunity Charts

Several charts are available that support analysis of opportunities data. The data can be depicted in a variety of formats such as pie graph, bar graph, and so on.

Table 5 describes each opportunity analysis chart.

Table 5. Opportunities Charts

Chart	Description
Lead Analysis	This chart displays the number of opportunities or revenue by organization or primary sales representative. The data is segmented by lead quality.
Lead Source Analysis	This chart displays the number of opportunities, revenue, or average revenue by time period. The data is segmented by lead source.
Lead Source Pipeline Analysis	This chart displays the number of opportunities by sales stage and lead source.
New Business Analysis	This chart displays the number of opportunities, revenue or average revenue over a time period.
Opportunity Analysis	This chart displays the number of opportunities by product, source, territory, and competitor.
Pipeline Analysis	This chart displays the number of opportunities or revenue by sales stage, organization, revenue size, or sales method.
Sales Pipeline Analysis	This chart displays the percentage of revenue quota and percentage of count quota.
Sales Pipeline Phases Analysis	This chart displays sales pipeline phases and the percentage of revenue quota or count quota achieved per phase.

Querying for Sales Method

To view the different sales methods in chart form, you must perform a query in the Sales Stage field of the Opportunity screen. The chart appears when the sales method is queried for opportunities. After you have performed the query, select the pipeline chart to display the results.

To query for a sales method

1. Navigate to the Opportunities screen.
2. From the Show drop-down list, choose All Opportunities.
3. In the Opportunities list, click Query.
4. In the Opportunities form, query on a Sales Stage and then click Go.
5. Click the Charts view tab.
6. In the Charts view, from the Show drop-down list, select the appropriate chart.

Viewing the Opportunity Sales Pipeline Analysis Chart

The Sales Pipeline Analysis works by evaluating the total revenue and count of opportunities by a selected sales methodology and then evaluating the total against each applicable quota.

NOTE: The Sales Pipeline Analysis Chart considers only active Quota plans, regardless of duration.

To display sales pipeline analysis information

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity to graph.
3. Click the Charts view tab.
4. In the Charts list, select Sales Pipeline Analysis from the Show drop-down list.
5. From the secondary Show drop-down list, choose either % of Count Quota, or % of Revenue Quota, and then click Go.

Viewing the Sales Pipeline Phases Analysis Chart

The Sales Pipeline Phases chart provides an overall view of the revenue generated for opportunities in an organization. Sales phases are basic components used to group stages together into basic sales categories.

To view the sales pipeline phases analysis chart

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Charts view tab.
4. In the Charts list, select Sales Pipeline Phase Analysis from the Show drop-down list.
5. From the secondary Show drop-down list, choose either % of Count Quota, or % of Revenue Quota, and then click Go.

Opportunity Reports

You also can generate reports of your opportunities data. Available reports include:

- Opportunities by Category
- Opportunities by Sales Rep
- Opportunity Summary
- Opportunity List
- Pipeline Report by Rep
- Smart Report - Opportunity Detail
- Opportunity Status
- Opportunity Marketing Events Summary

Generating Opportunity Reports

Use the following procedure to run opportunity reports.

To generate an opportunity report

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select an opportunity.
3. From the application-level menu, choose View > Reports.

   The Reports dialog box appears.

4. From the Select a Report drop-down list, choose the report to display, and then click Run Now to immediately generate the report.

   To generate the report at a later time, click Schedule, and then complete the fields in the Reports dialog box.

Configuring the Opportunities by Category Report

The Opportunities by Category report can be configured to sort by City, Close Date, Sales Cycle Stage, Source, Source Date, State, Territory, or ZIP Code.

To configure the Opportunities by Category report

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select an opportunity.
3. From the application-level menu, choose View > Reports.
4. In the Reports dialog box, choose the Opportunities by Categories report from the Select a Report drop-down list, and then click Run Now.
5. In the Opportunity Parameters dialog box, choose a sort parameter in the Sort By field, and then click Finish.

D&B Integration 5

This chapter explains how to use D&B data and reports to manage customer relationships, acquire new customers, and create high quality new account records.

D&B Overview

You can integrate D&B data and reports into your Siebel application, allowing you to perform the following tasks:

- Use D&B information to standardize data for your customer accounts
- Access D&B business and credit reports
- Search D&B for new accounts
- Generate prospect lists based on D&B relationships and demographic data
- View account hierarchies and related opportunities across a corporate family structure

D&B data supports the following:

- Customer acquisitions
- Sales call planning

Business Scenarios

The following business scenarios describe some ways in which you can use D&B data in your Siebel application.

Relationship Management

A company can increase market penetration across its existing customer base by determining how many relationships the company already has within a corporate family structure. Sales managers and representatives can use D&B D-U-N-S numbers to view the organizational hierarchies of clients and aggregate account attributes at each level.

For instance, a sales representative plans to sell computers to 20 business locations and he discovers that there are locations for this company that he has not yet contacted. In another situation, the sales manager many want to see a rollup of opportunities and the potential revenue for each subsidiary and location for a specific company on a worldwide basis.

Customer Acquisition

Because a sales organization is always looking for more leads to new business, sales professionals can access company information in the Siebel D&B database, allowing them to generate prospects in their territories.

With D&B, the sales representative can query the Siebel D&B database using criteria to target new leads. The sales representative can query using demographic data, revenue profiles, or other criteria. After generating a list of leads, the sales representative can automatically add the companies and contacts to their company's accounts list. These promoted accounts and contacts are automatically updated when D&B updates occur.

D&B Search for New Account Information

Sales professionals can access the D&B database real-time to find and retrieve new D&B account information that is immediately available for use within Siebel Sales. This information includes company demographic, corporate linkage, and address data maintained by D&B.

For example, a sales representative discovers a new opportunity, but the representative cannot find the account in either the Siebel account list or the D&B account list. Instead of creating a new account, the sales manager performs a real-time D&B search to obtain up-to-date, quality information that can be used to automatically establish a new Siebel account. This provides the sales team with valuable information that they can use when working on the new opportunity.

Using D&B

The D&B screen allows you to access D&B marketing data as well as business and credit reports from within the Siebel Sales application. D&B allows you to create targeted marketing lists, supply corporate linkage information, and provide you with online access to selected D&B business and credit reports.

You can directly access D&B data for use in prospecting, qualifying leads, and generating marketing lists.

D&B D-U-N-S Number

The D-U-N-S (Data Universal Numbering System) number is an important component of D&B data. The D-U-N-S number is a unique nine-digit identifier assigned to each business entity in the D&B database.

D&B links the D&B D-U-N-S numbers of parents, subsidiaries, headquarters, and branches on more than a million corporate family members around the world.

Viewing D&B Data

When you have the D&B account information loaded into your Siebel Sales application, a number of views allow you to use the data and view company hierarchies. The following procedure explains how to view aggregate data for a company using the D&B screen.

NOTE: D&B data for a company is read-only until it is promoted to a Siebel account.

To view aggregate data

1. Navigate to the D&B screen.
2. In the D&B Accounts list select the account for which you want to view the aggregate data.

3 In the More Info form, click Query.

4 In the query form, enter the query criteria, and then click Go.

A list of D&B accounts that meet your criteria appear.

NOTE: If the DUNS # field does not appear in the list, click the menu button, choose Columns Displayed, and adjust the list of displayed columns.

Promoting a D&B Account

You can use the D&B list to locate accounts that are potential sales leads. After you identify accounts that meet your criteria, you can promote the accounts into your accounts list.

To promote a D&B account

1 Navigate to the D&B screen.

2 In the D&B Accounts list select the company or companies that you want to add to your accounts list.

NOTE: To select a sequence of account records, hold down the SHIFT key and click the account records. To select multiple accounts that are not in sequence, hold down the CTRL key and click the account records.

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3 In the D&B Accounts list, click Promote as Siebel Account.

A check mark appears in the Promoted field and the company is added to your Siebel Sales application.

NOTE: Drill down on the hyperlink in the Business Name field to view the account profile and related contacts.

Creating a Prospect List

You can use D&B data to generate sales leads. One way to use sales leads is to create a prospect list for your telesales or sales team to contact.

To create a prospect list

1. Navigate to the D&B screen.
2. In the D&B Accounts list select the company or companies that you want to include in your list, and then click Create D&B Lists.

   The contacts associated with the company or companies are added to a prospect list.
3. To view the prospect list, select D&B Lists from the Show drop-down list.
4. In the D&B Lists list, select the list and drill down on the list name hyperlink to view accounts on the list.

Viewing a D&B Report

After a D&B report order is set up by your administrator, you can view business and credit reports within your Siebel application.

To view a D&B report

1. Navigate to the D&B screen.
2. In the D&B Accounts list select the company for which you want to view reports.
3. Click the Reports view tab.

   The D&B report for the selected company appears.

NOTE: This information can also be viewed from the Accounts screen's D&B Reports view tab.

Global Integration and Adding New D&B Accounts

After a D&B Global Integration access is set up by your administrator, you can access D&B real-time within your Siebel application and enter criteria to locate new accounts in the D&B database. Search criteria can include the business name with state/province and country information, D&B D-U-N-S number, local business ID, and telephone number.

Searching D&B for New Accounts

When you execute a search for new D&B accounts, the search criteria is sent to D&B's Global Integration, along with the user's D&B account name and password. When D&B receives the information, Global Integration automatically selects the single best search method to execute based on the criteria. D&B calculates the criteria matches and returns the number to Siebel. If there are no matches for the criteria, the requestor is notified.

At this point, you can opt to purchase the account information, or cancel the Global Integration search process. If an account is purchased, data received from D&B is added to the Siebel D&B tables and is available in D&B All Accounts view.

NOTE: If the selected account already exists in your Siebel D&B database, the account is not purchased.

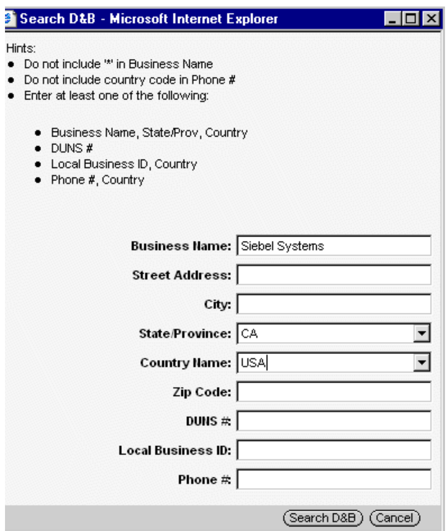
To initiate D&B's Global Integration search

1. Navigate to the D&B screen.
2. In the D&B Accounts list, click Search D&B for New Account.

3 In the Search D&B dialog box, complete the fields for the query.

The following illustration shows an example of the search criteria form.

You must enter sufficient data to initiate a query in the United States. For example, as the following figure shows, in the Search D&B form you can enter Business Name, State/Province and Country as criteria, or just the DUNS #, or the Local Business ID and Country, or the Phone number and Country. If you only enter the Business Name, the search fails because the data is insufficient.



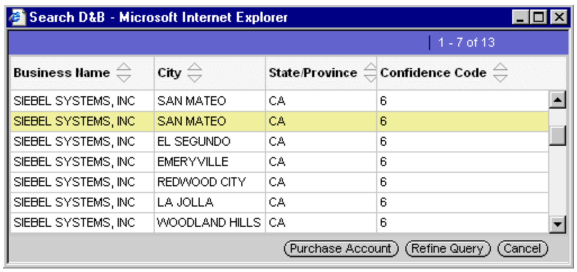
The following table describes the Search D&B query fields.

Field	Comments
Business Name Street Address City State/Province Country Name Zip Code	The Name/Address search is the most commonly used search method. At a minimum, the business name and country must be supplied. For Canadian businesses, the province must also be included. When you are searching for a business by name, do not use wildcard characters, (*) for unknown characters in the name. Additional information such as town, street address, and postal code, can be included to increase the chances of finding an exact match.
DUNS #	This search method allows you to enter a known D&B D-U-N-S number to verify the identity of a business. The D&B D-U-N-S number should contain only nine numeric characters (no spaces, dashes, and so on).

Field	Comments
Local Business ID	Many countries have their own numbering schemes to identify local businesses. Normally, this is a government-sponsored schema for the purpose of business registration and tax filing. The local business ID submitted in a search should only contain numeric characters (no spaces, dashes, and so on). A country code must also be included with the request. D&B Global Integration supports searching by the following local business identifiers. Australia—CAN Belgium—BTW/TVA France—SIREN Germany—Hr. Number Ireland—Company House Italy—CCIAA Netherlands—KvK Nr Portugal—Fiscal Spain—CIF/NIF Sweden—Company House United Kingdom—Company House
Phone #	If using a telephone number search, enter the telephone number as dialed from *within* the country, including the area code or city code if required. The international long distance code (country code) should not be included. For example 9086655000 for a search in New Jersey, US; 9055686000 for a search in Ontario, Canada; 01494422000 for a search in High Wycombe, England; 0104009400 for a search in Rotterdam, Netherlands. The telephone number should contain only numeric characters (no spaces, dashes, and so on).

4 After you have entered the criteria, click Search D&B.

The following figure shows sample search results, with the business name, city, and state in the Search Results list.



5 In the Search D&B list of results, select an account and then click Purchase.

Click Refine Query to modify the query criteria. Click Cancel to return to the D&B Accounts list without purchasing.

The purchased account is highlighted in the D&B Accounts list.

Competitors 6

This chapter explains how to use the Competitors screen to examine comparisons of your company and competitors, view comparative literature of your products and those of your competitors, and associate a competitor with an opportunity.

Competitors Overview

A competitor is an organization that buys or sells products or services similar to those of your organization. The Competitors screen provides you with useful information and literature about your competitors and their products. This information can be used in preparation for a sales call, or during a telephone conversation to differentiate your offerings from those of your competitors.

You can use the Competitors screen to perform the following tasks:

- View a list of your competitors and their products
- Display your competitor's literature and literature that compares your company's products and services to those of your competitors
- Compare your company and products to your competitor's company and products

Business Scenario

A sales representative logs into the Siebel Sales application and discovers a newly qualified opportunity. He navigates to the Competitors view to review the competition for the opportunity. One competitor is listed for the deal. The sales representative is not familiar with the company and drills down on the competitor name hyperlink to learn more.

In the Company Comparisons view, the representative can view a side-by-side comparison of his company and the competitor's company. You have access to competitive intelligence documents compiled by your company about this competitor, as well as literature items that the competitor has published.

In the Competing Product Comparisons view, you can view a detailed, side-by-side comparison of your company's products compared to the competitor's products. You navigate to the Product Literature view and send a document to your sales team to help prepare for the next sales call.

Working with Competitive Information

In competitive sales situations, it is imperative to have information about your competitors to strengthen your sales strategy and differentiate your company's image and offerings.

Associating a Competitor with an Opportunity

Associating a competitor with an opportunity notifies your sales team about the competition for that deal and provides them with a link to the information the sales team needs to deliver a consistent, winning sales strategy.

To associate a competitor with an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity with which you want to associate the competitive information.
3. Click the Competitors view tab.
4. In the Competitors list, click New.
5. In the Add Competitors dialog box, select the competitor and then click OK.
6. In the Competitors list, complete the fields as needed.

TIP: Drill down on the hyperlink in the competitor Name field to navigate to the Competitors screen to obtain more information.

The following table describes fields in the Competitor record.

Field	Comments
Comments	A text field that allows you to record additional information about the competitor.
Name	Displays the competitor’s company name as a hyperlink.
Primary	A check box which, when selected, indicates that the competitor is the primary rival for the deal.

Field	Comments
Status	A list of values established by your company that allows you to specify the prospect's interest level in the competitor's offerings. Default values include Some Interest, Evaluation in Progress, Existing Relationship, and Not Satisfied.
Threat	A list of values established by your company that allows you to specify the value of the competitor's threat. Default values include 1-Low, 2-Medium, 3-High, 4-Very High.

Competitor Comparisons

In many sales situations it is necessary to discuss competitive information with a prospect. Using the Competitors screen, you can view comparisons about companies, products, and services, and also find literature to prepare for sales calls.

Viewing Company Comparisons

To learn more about the competitor's company and products, you can view competitor comparison information.

To view company and comparisons

1. Navigate to the Competitors screen.
2. In the Competitors list, select the competitor.
3. Click the Company Comparisons view tab.

   The Company Comparisons, Competitor's Literature, and Comparative Literature lists appear, as shown in the following figure.

To view competitor literature

1. Navigate to the Competitors screen.
2. In the Competitors list, select the competitor for which you want to view company literature.
3. Click the Company Comparisons view tab.
4. In the Competitor's Literature list, select the literature item you want to view.
5. Drill down hyperlink in the Name field to view the literature item.

Viewing Comparative Literature

You can view literature that compares your products with those of your competitors. After you determine the advantages of your product over the competition, you can use this information in your sales strategy.

To view comparative literature

1. Navigate to the Competitors screen.
2. In the Competitors list, select the competitor for which you want to view comparison literature.
3. Click the Company Comparisons view tab.
4. In the Comparative Literature list, select the literature item you want to view.
5. Drill down on the hyperlink in the Name field to view the comparative literature item.

Products 7

This chapter explains how sales professions can use the Products screen and its related views to address a customer’s questions about products and their features, review and provide the customer with product comparisons, and view price lists and associated products.

Products Overview

Products can be physical goods or intangible items such as service, sales agreements, or sales promotions. While working on an opportunity, you can use the Products screen and related views to view additional information about a product and its features.

This chapter describes ways in which you can view product information, but you cannot make changes or update product information. For more information about your company's products, see your application administrator.

Business Scenario

A prospective customer calls to ask specific questions about a product you sell. The prospect is interested in the features of a specific service package and how it compares to the next higher level of service package you offer. You can view this information and provide the prospect with more details about each offering.

Working with Products

Using the Products screen and its related views allows you to address a customer's questions about the products and their features.

Viewing Product Features and Images

The Products screen, Features and Image view allows you to view details about the product and view an image of it, if an image is associated with the product. The features and image view is read-only. Your application or product administrator maintains the product information for your company.

To view product features and image information

1. Navigate to the Products screen.
2. In the Products list, select the product.
3. Click the Features and Image view tab.

NOTE: You can also view product features and image information from the Quotes screen and the Opportunities screen.

Viewing Product Comparisons

Product comparisons present a feature-by-feature comparison between related products. You can use comparisons when you are prepare for meetings, sales calls, or when you are speaking to a prospect on the telephone.

To view product comparisons

1. Navigate to the Products screen.
2. In the Products list, select the product for the comparison.
3. Click the Product Comparison view tab.

   The Product Comparison list appears.

Viewing Product Literature

You can view literature associated with a particular product. Literature items can include data sheets, white papers, marketing collateral, and so on.

To view product literature

1. Navigate to the Products screen.
2. In the Products list, select the product.
3. Click the Literature view tab.
   a. In the Literature list, click Query.
   b. In the query form, enter query criteria and then click Go.
4. In the Literature list, drill down on the hyperlink in the Title field.

   The literature opens in the format in which it was saved.

Viewing Price Lists

You can view price lists to locate the price list associated with a particular product.

To view price lists

1. Navigate to the Products screen.
2. In the Products list, select the product.
3. Click the Price Lists view tab.
4. In the Price Lists list, click Query, enter query criteria in the form, and then click Go.

   The price list appears in the list.
5. To view additional information, drill down on the hyperlink in the Price List field.

Viewing Related Products

When you discuss products with a prospect or customer, you may need to consider related products to substitute because products may be back ordered, sold out, delayed in shipping, or unavailable for other reasons.

To view related products

1. Navigate to the Products screen.
2. In the Products list, select the product, and then click the Related Product view tab.
3. In the Related Product list, drill down on the product name hyperlink.

Activities 8

This chapter explains how to use the Activities screen and associated views to track tasks and events performed for contacts, accounts, and opportunities. Activities can be associated with accounts, contacts, and opportunities, and activity templates with predefined activities can be created and used company-wide.

Activities Overview

Your Siebel application tracks various tasks or events performed for contacts, accounts, and opportunities as Activity records. Activities can be grouped into lists and activity templates created for use across the company.

Using activities, you can assess the investment in time and resources to maintain and grow the account relationships. Sales managers also have a record of the activities of their sales representatives as they manage account relationships. Sales teams can use activities to avoid duplicating efforts across the team, and to share information about pending and completed activities.

NOTE: Activities that are assigned specific dates and times appear on both the Activities and the Calendar screens. For more information, see *Fundamentals, MidMarket Edition*.

Business Scenario

A customer plans to visit the headquarters of a software company to meet with executives and view a product demonstration. In preparation for the event, the sales manager creates and delegates to her team several activities such as preparing slides, reserving a conference room, and configuring a demo. To make it easier to track these activities, the sales manager assigns the activities so that they appear in the team members' calendars and to-do lists.

As the manager and sales team members complete the activities, the activities are marked as done, providing important progress information about the opportunity.

Working with Activities

An activity is a task or an event that you plan to complete or to delegate to a colleague for completion. In Siebel Sales, activities are associated with an account, a contact, or an opportunity.

Creating an Activity

During a typical workday you have new tasks to complete. By creating a new activity record, you make sure your team members know about the activity, and you create a valuable history of your completed and planned interactions with customers.

To create an activity

1. Navigate to the Activities screen.
2. In the Activities list, click New.
3. In the new record, complete the necessary fields.
4. Choose an appropriate value in the Display In field.

   The Display In value determines where the activity appears:

   - If you only want the activity to appear in the Activity list, choose Activities Only.
   - If you want the activity to appear in the calendar as well as the activities list, choose Calendar and Activities, and make sure that the activity has a start time.
   - If you want the activity to appear in the My To Do's list on the calendar screen, choose To Do and Activities.

   The following table describes fields in the Activities form.

Field	Comments
Account	Displays the account associated with the activity.
Activity #	A default value that displays an application-generated number.

Field	Comments
Alarm	If you want to be reminded of an activity, select the Alarm check box. A reminder dialog box appears when the activity is due. You can either set an alarm for an individual activity, or you can set a default alarm for all your activities. For more information, see *Fundamentals, MidMarket Edition*.
Audience	A list of values established by your company that allows you to specify which audiences can view the activity. Examples of values are employees, partners, and customers.
Billable	A check box which when selected, indicates the activity is a revenue-generating event.
Category	A list of values established by your company that allows you to specify a category for the activity. Service related activities are often created by one individual (such as a call center agent) and completed by another (such as a service repair representative). Consequently, when a service related category value is selected (such as Diagnostic, Field Engineer Activity, Preventative Maintenance or Other), the owner of the activity is deleted so that the activity is unassigned. The user can then reassign the activity by adding a new value to the owner field. If the customer is using Siebel Territory Assignment Manager, the activity is automatically reassigned. For more information about Activities and Categories, see *Applications Administration Guide, MidMarket Edition*.
Comments	A text area for notes and information to be shared across the team about the activity.
Cost Estimate	Displays a monetary value associated with the activity estimate.
Created	Displays the date and time the activity was created.
Created By	Displays the User ID of the activity creator.
Description	Enter additional information about the activity in the text field.
Display In	A field which determines where an activity appears. The field has three values— Calendar and Activities, To Do and Activities, Activities Only. If, for example, you want an activity to appear in your calendar, you must set the Display In field to Calendar and Activities.

Field	Comments
Due	An editable date field that displays a date and time by which the activity must be completed.
Duration	A list of values established by your company that allows you to choose the duration of an activity. Default values are in minute segments, for example 5, 10, 15, and 20.
Employees	Displays the User ID of the activity creator. You can select multiple employees for an activity, but only one employee can be designated as primary.
End	An editable date field that displays the proposed date and time for the activity completion.
Global Owner	Displays the employee who is responsible for the activity.
Meeting Location	A text area for location information to be shared across the team. Examples of meeting locations are Conference Room B and Main Campus Facility.
Opportunity	Displays a dialog box that allows you to associate an opportunity with an activity.
Owner	The field displays the primary employee associated with the activity. The default owner is the creator of the activity. Enter a new value into the field by typing the User ID directly into the field, or click the select button and choose the primary employee from the Pick Employee dialog box. In either case, the new value replaces the old primary. The new value that you enter into the Owner field also replaces the primary employee that appears in the Employee field. Conversely, if you add a new primary to the Employee field, this new primary also appears in the owner field.
Price List	A list of values established by your company that allows you to specify which price list is associated with a billable activity.
Priority	A list of values established by your company that allows you to assign a priority to the activity. Default values include 1-ASAP, 2-High, 3-Medium, and 4-Low.
Project	Displays a dialog box that allows you to associate a project with an activity.

Field	Comments
Rate List	A list of values established by your company that allows you to specify which rate list is associated with a billable activity.
Repeat Frequency	If Repeat Frequency is selected, this field displays the interval at which the activity repeats. Default values include daily, weekly, monthly, and yearly.
Repeat Until	An editable date field that displays the date and time for the last interval of the final meeting in the series.
Site	A default value that is automatically entered when you associate the account with an activity.
Start	An editable date field that displays the date and time the activity was created.
Status	A list of values established by your company that allows you to assign a status to the activity. Default values include Acknowledged, Cancelled, Declined, Scheduled, and Completed.
Type	A required field. A list of values established by your company that allows you to define the activity type. Default values include Call, Correspondence, and Email.

NOTE: The My To Do filter allows you to view each activity that has been designated as a To Do item using the Display In field. Choose My To Do List from the Show drop-down list to access this feature. You can further refine your To Do list by using the predefined queries that appear in the Queries drop-down list. For example, if you select the Uncompleted Activities query, the To Do items that do not have a status of Done appear. You can also view uncompleted To Do items in the My To Do's list that appears on the calendar screen. This list, by default, only shows To Do items that are not yet complete.

Delegating an Activity

If you work as part of a sales team or are a sales manager, you may manage other people's activities. You can delegate an activity to another member of the sales team, an employee, or a partner.

To delegate an activity

1. Navigate to the Activities screen.
2. In the Activities list, select the activity that you want to delegate.
3. In the Activity form, click the select button in the Owner field.
4. In the Pick Assigned to dialog box, choose the person to whom the activity will be assigned, and then click OK.

   The previous owner is removed from the activity and the newly designated person becomes the owner.

To reassign an activity using the Employee field

1. Navigate to the Activities screen.
2. In the Activities list, select the activity that you want to delegate.
3. In the Activity form, click the select button in the Employees field.
4. In the Employees dialog box, select the individual to whom the activity will be assigned.

   Click New to add employees to the Employee dialog box.

5. Click the check box in the Primary field to designate the individual as the primary employee, and then click OK to close the dialog box.

To remove the old owner from the activity

1. Navigate to the Activities screen.
2. In the Activities list, select the activity.
3. In the Activity form, click the select button in the Employees field.

4 In the Employees dialog box, select the old owner and click Delete.

NOTE: If you want the application to use Siebel Territory Assignment Manager to automatically assign a person, in the Activity form click the menu button and choose Assign. If the delegator uses Siebel Territory Assignment Manager to reassign an activity, the delegator is automatically removed from the employee list.

Associating an Employee or Resource with an Activity

When you add an activity to your calendar, you may also want to have a record of individuals who participate in the activity, and available resources.

To associate an employee with an activity

1. Navigate to the Activities screen.
2. In the Activities list, select the activity.
3. Click the Participants view tab.
4. In the Employees list, click New.
5. In the Add Employees dialog box, select the employee, and then click OK.

To associate a contact with an activity

1. Navigate to the Activities screen.
2. In the Activities list, select the activity.
3. Click the Participants view tab.
4. In the Contacts list, click New
5. In the Add Contacts dialog box, select the contact, and then click OK.

To associate a resource with an activity

1. Navigate to the Activities screen.
2. In the Activities list, select the activity.
3. Click the Participants view tab.
4. In the Resources list, click New.
5. In the Resources dialog box, select the resource from the list, and then click OK.

Activity Templates

Activity templates allow you to coordinate complex tasks into a predefined set of activities called an Activity Plan. You can select an appropriate Activity Template for the goal you want to achieve, which generates a list of activities associated with the Activity Template. This keeps you from creating a new list of activities for each sales call, corporate visit, and special event.

For instance, the following list of activities can serve as an Activity Template for a a corporate visit with clients for product demonstrations:

- Book a conference room
- Set an agenda
- Confirm the date and time with the customer
- Make arrangements for presenters

This set of tasks, when defined as a template, helps sales team members follow the steps your company recommends to prepare for a corporate visit. The list drives critical tasks and defines the recommended lead time for each activity within the template.

Activity Plans

Activity Plans are groups of activities or subactivities related to successfully completing a business service. Frequently, activity plans incorporate a company's best practices. Using activity plans, you can locate, assign, schedule, and track the progress of related activities.

For example, each activity associated with a customer visit to corporate headquarters can be assigned to a different individual, and each activity can have a different due date. You can track the progress of all activities associated with the customer visit using the Activity Plan.

Generating an Activity Plan

You can generate an activity plan for an opportunity or for other business components including accounts and contacts, and then assign the activities to others and set due dates for completion. You can use the following procedure for any other business component that has the Activity Plan view tab.

To generate an activity plan for an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Activity Plans view tab.
4. In the Activity Plans list, click New.
5. In the new activity plan record select a template from the Template field drop-down list.

   A list of the activities associated with the template you selected appears in the Activities subview.

Messages 9

This chapter explains how to use the Messages screen to create messages and alerts, associate them with opportunities and activities, and send messages using email. Broadcast Messages is a separately licensed product.

Messages Overview

The Messages screen provides a way for employees to enter messages into the Siebel application and associate messages with accounts, opportunities, contacts, and service requests.

For example, if an employee receives a phone call from a customer asking for more information about a product that the employee's company does not sell, the employee can create a message, associate it with the contact, and assign the message to a colleague who is knowledgeable about the product. The employee can also delegate activities, add attachments, or initiate message alerts.

Business Scenario

An assistant receives a message for an executive, either by phone or by voice mail. Instead of writing the message out by hand, the assistant enters the message in the Messages screen and assigns the message to the executive. Before saving the message, the assistant can perform the following tasks:

- Associate the message with an existing account, opportunity, contact, or service request
- Add additional information to the message in the Comments field
- Add electronic file attachments to the message
- Prioritize the message
- Send an email or screen alert or both

NOTE: By default, a message is marked private, which means that only the assistant and executive can review the message. The assistant can choose not to mark the message private, and then any individual with access to the account, activity, contact, opportunity, or service request associated with the message can view it.

Message Communications

You can use messages to communicate with others who also use your Siebel application. Messaging allows managers and executives to delegate activities to the appropriate employee for follow-up. You can create messages, set up email and screen alerts, view and sort messages, and associate activities and other items with messages. Using messages allows you to maintain a history of the communication associated with a contact, account, opportunity, or information request.

Creating a New Message

Throughout the day, your organization receives phone calls and email. Some of the calls or email that you receive may be related to your accounts, contacts, or opportunities. By creating messages, you and your colleagues can share knowledge and create a history of your interactions.

To create a new message

1 Navigate to the Messages screen.

2 In the Daily Messages list, click New.

3 In the new message form, complete the fields.

The following table describes fields in the Message record.

Field	Comments
Account	Shows the Account name associated with the message, if applicable.
Alert Type	Allows you to select a value from the drop-down list to indicate the alert type for the message. Default values include None, Email, Screen Alert, and Email and Screen Alert.
Assigned To	A required field that displays the name of the individual to whom you are assigning the message. You can select a default value in the Default Assigned To field in the User Preferences screen. See *Fundamentals, MidMarket Edition* for more information on user preferences.
Comment	An optional text field that displays additional information.

Field	Comments
Date/Time	An editable field that displays the month, day, year and the hour, minute, second that the message was created.
Email Address	Automatically populates the email address when you select the contact record.
First Name	Automatically populates the first name of the contact when you select the contact record.
Home Phone #	Automatically populates the home telephone number when you select the contact record.
Last Name	A required field that displays the last name of the contact you selected as the message recipient. After a record is saved, you can drill down on the hyperlink to navigate to Contacts and More Info.
Message	A text field that displays the content of the message.
Mobile Phone #	Automatically populates the mobile telephone number when you select the contact record.
Opportunity	Displays the Opportunity associated with the message, if applicable. Click the select button to choose an opportunity.
Priority	Allows you to select a value from the drop-down list to indicate the message priority. Default values include 1-ASAP, 2-High, 3-Medium, and 4-Low.
Private	Displays a check box which, when selected, allows only the message creator and recipient to view the message. When the check box is cleared, team members associated with the opportunity, account, contact, and service request can view the message.
SR #	Displays the Service Request number associated with the message, if applicable.
Status	Allows you to select a value from the drop-down list to indicate the message status. Default values include New, Read, Delegated, Return Call, and Completed.
Work Phone #	Automatically populates the business telephone number when you select the contact record.

Message Alerts Overview

There are two types of message alerts you can establish to send screen or email and screen alerts. You can set up email and screen alerts for messages and individuals to whom you delegate message-related activities, and perform the following tasks:

- Set up an alert for an individual to whom you routinely send messages

  For instance, you routinely send messages to the same individuals, and you want to set up a standard alert method to let them know you have sent a message.

- Set up an alert for a single message so the recipient receives an alert

  For instance, you send a message to an individual for whom you have not set up a message alert, but you can also set up an alert for the individual message.

Email and Screen Alerts

The following section describes alert types and how they work in your Siebel application. You can also select the option of receiving both email alerts and screen alerts simultaneously.

A message generates an email alert when the following events occur:

- A message is created and the Alert Type field has a value of Email or Email and Screen Alert.
- A message is assigned to you, and you have set up an alert to receive email when messages or activities are assigned to you by a contact or employee.
- An activity is assigned to you, and you have set up an alert to receive email when messages or activities are assigned to you.
- You send an email from your Siebel application.

A message generates a screen alert when the following events occur:

- A message is created and the Alert Type field of the Messages form has a value of Screen Alert.
- A message is assigned to you, and you have set up an alert to receive email when messages or activities are assigned to you by a contact or employee.
- An activity is assigned to you, and you have set up an alert to receive a screen alert when messages or activities are assigned to you.

Setting Up an Ongoing Message Alert

You can set up an ongoing alert type for an individual. This individual always receives an alert when you assign a message to him.

To set up an ongoing message alert

1. Navigate to the Messages screen.
2. Click the Message Alert Setup view tab.
3. In the Message Alerts Setup list, click New.
4. In the new Message Alert record, click the select button in the Last Name field.
5. In the Pick Contact dialog box, select the name, and then click OK.
6. In the Alert Type drop-down list, select the type of alert.

   The default value in the Alert Type field is None. Other values are Email Alert, Screen Alert, and Email and Screen Alert.

Sending a Single Message Alert

You can assign an alert to a single message to notify the recipient of a message. You can do this either while you are creating the message or after you have saved the message.

To send a single message alert

1. Navigate to the Messages screen.
2. In the Daily Messages list, click New.
3. In the Message Details form, click the Alert Type drop-down list and choose the type of alert to assign to the message.

Viewing Messages

You can view messages assigned to you or created by you in the application.

To view messages assigned to you

1. Navigate to the Messages screen.
2. In the Daily Messages list, select the message to read.
3. Review the Message field in the Message Detail form.

To view messages created by you

1. Navigate to the Messages screen.
2. Click the All Messages view tab.
3. In the All Messages list, click the menu button, and then choose Columns Displayed.
4. In the Columns Displayed dialog box, move Created By from the Available Columns list to the Selected Columns list, and then click Save.
5. In the All Messages list, click Query, complete the Created By field and click Go.
6. In the All Messages list, sort the messages by Date/Time.

Sorting Messages by Intervals

Use the appropriate view tab to sort messages into Daily, Weekly, or Monthly lists. You also can use queries to achieve the same result. The default query for the My Messages list displays all messages, but you can select predefined Daily, Weekly, or Monthly queries to refine your lists.

To sort messages by intervals

1. Navigate to the Messages screen.

   A list of messages you received today appears in the Daily Messages list.

2. Adjust values in the Date fields, and then click Go.

   A list of messages for the specified date appears.

3 Click Today to reset the date to the current date.

4 Click the Weekly Messages view tab to view messages you received in the previous seven-day interval.

5 Click the Monthly Messages view tab to view messages you received in the last 30 days.

Associating a Message with an Opportunity

You can associate a message with an opportunity, a contact, an account, or a service request. The following procedure explains how to associate a message with an opportunity. You can also use the basic procedure to associate a message with other items by selecting the appropriate field name, such as account or contact.

To associate a message with an opportunity

1 Navigate to the Messages screen.

2 In the Messages list, click New.

3 In the Message Details form, click the select button in the Opportunity field.

4 In the Pick Opportunity dialog box, select the opportunity to associate with the message, and then click OK.

Associating an Attachment with a Message

You can associate an electronic file as a message attachment to provide you with related information. For instance, you can attach a sales document for your manager to review.

To associate an attachment with a message

1 Navigate to the Messages screen.

2 Click the Attachments view tab.

3 In the Message Attachments list, click New.

4 In the new record, click the select button in the Attachment Name field.

   a In the Add Attachment dialog box, click Browse.

   b In the Choose File dialog box, navigate to the file, and then click Open.

   c In the Add Attachment dialog box, click Add.

   The attachment record appears in the Message Attachments list associated with the message.

5 In the attachment record, enter a description of the attachment in the Comments field.

NOTE: For general information on working with attachments, see *Fundamentals, MidMarket Edition*.

Associating an Activity with a Message

When you need to share information related to an item that requires follow-up action, you can associate an activity with a message.

To associate an activity with a message

1 Navigate to the Messages screen.

2 In the Daily Messages list, select the message associated with the activity.

3 Click the Activities view tab.

4 In the Activities list, click New, and then complete the fields for the new record.

NOTE: For more information on the activity-related fields, see Chapter 8, "Activities."

Sending a Message Using Email

You can send email messages to the recipient from within your Siebel application. The recipient either can be inside or outside your corporate firewall because Siebel Sales uses the email address associated with the contact information for the recipient. After you create a message and fill in the fields, as needed, you can send the message as an email.

To send an email message

1. Navigate to the Messages screen.
2. In the Daily Messages list, select the message to send as an email message.
3. From the application level menu, select File > Send > Email.

   The Send Email dialog box appears.
4. Complete the fields for the email, and then click Send.

   In the email form, click To to display the Address Book dialog box.

NOTE: For information on standard email functionality within Siebel Sales, see *Fundamentals, MidMarket Edition*.

Correspondence 10

This chapter explains how sales professionals can use the Correspondence screen to communicate and track correspondence with prospects and customers. It also explains how to create and use correspondence templates, generating and printing, and sending correspondence to a Fulfillment Center. For more information on administrative tasks relating to Correspondence, see *Applications Administration Guide, MidMarket Edition*.

Correspondence Overview

Correspondence allows you to send direct mail to prospects and customers. Correspondence requests are based on templates, which allows users to interact consistently in communications.

Correspondence allows you to perform the following tasks:

- Create new correspondence from a pre-defined or personal template
- Correspond with one or more contacts using the same template
- Enclose files and literature with the correspondence
- Preview and edit your correspondence
- Deliver correspondence to contacts through several methods
- Track correspondence you have sent to contacts

NOTE: You can edit correspondence if you have Microsoft Word installed on your local computer. You do not need Microsoft Word to create correspondence.

Business Scenario

Sales professionals use Siebel Sales correspondence to automate letter writing tasks, send out literature, and track correspondence sent to prospects and customers.

A customer requests literature about specific product and service offerings. The sales representative creates a letter using a template called Thank You for Your Interest. The sales representative selects the contact recipient and determines which product literature to include with the letter.

When the sales representative reviews the letter, he see a Microsoft Word document that includes the customer’s name and address, thanks the customer for his interest and tells him a little about the company. The letter also lets the customer know that the sales representative plans to follow up with the customer soon.

When the sales representative is ready to send the letter, he can print the letter and send it, or have the company’s fulfillment center generate the letter, enclose the product literature, and send it on behalf of the sales representative. The sales representative also can email this information to the customer. A record of the correspondence is associated with the contact, and allowing the sales representative to review the correspondence at a later date.

Correspondence Process

To create correspondence, use the following process flow.

1. Create a new correspondence record, and specify the appropriate template (Required).
2. Add recipients to the correspondence by selecting one or more contacts (Required).
3. Insert electronic files or enclose literature with the correspondence (Optional).
4. Generate the Correspondence (Required, if you want to preview the document).
5. Preview the letter (Recommended).
6. Print, email, or submit the letter to a fulfillment center (Required).
7. Monitor the fulfillment request to make sure the correspondence has been mailed, if you submitted the letter for fulfillment (Recommended).

Creating Correspondence

You can create correspondence using a selection of pre-defined templates for letters and labels. You can create personal templates that only you can access, or you can use templates created by your administrator. For information on creating personal templates, see "Creating a Personal Correspondence Template."

NOTE: You must associate one or more recipients with the correspondence before you can generate or submit the request for fulfillment.

To create correspondence

1. Navigate to the Correspondence screen.
2. In the Correspondence list, click New.

   A new correspondence record appears in the list with In Progress in the Status field, and the current date and time in the Created field.

3 In the new Correspondence record, select a correspondence template.

For example; if you want to create a mailing you might choose the MICROSOFT_Promotional template for the letter and the MICROSOFT_Labels template for the mailing labels. If you only want to create labels, you still select both templates, but only generate the labels with the Generate Labels command in the Correspondence list menu.

NOTE: The fixed text of each correspondence template is written using specific locale conventions and language. The author of the template can choose the locale and language using the Locale and Language fields in the template record to support Global Deployment.

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a To create a letter, click select in the Template field, choose a letter template from the Pick Template dialog box, and then click OK.

b To create a label, click select in the Template field, choose a label template from the Pick Template dialog box, and then click OK.

4 In the correspondence record, complete other fields as needed.

The following table describes fields in the Correspondence record.

Field	Comments
Created Date	A default value that displays the date and time you created the correspondence.
Document Status	Displays a system status for the document during generation. Default values include In Progress, Generating, Completed, and Failed.
Fulfillment Center	Displays a drop-down list of fulfillment centers that can produce and distribute the document and enclosures on your behalf.
Generated Document	Drill down on the hyperlink in this field to preview the document merged with the name and address of the selected recipient in the Recipients list.

Field	Comments
Generated Label	Drill down on the hyperlink in this field to preview the label merged with the name and address of the selected recipient in the Recipients list.
Label Status	Displays a system status for the label during generation. Default values include In Progress, Generating, Completed, and Failed.
Label Template	Displays the name of the label template defined by your company and created by your Siebel administrator, or your personal template.
Modified Template	If you have modified the template, click the select button in this field and navigate to the modified file to choose it. For example, you choose a template, drill down on the Template name hyperlink to open the template and modify template text. After saving the modified file locally, you specify it using the Modified Template field.
Opportunity	Displays the name of the opportunity associated with the correspondence. Drill down on the opportunity name hyperlink to open the Opportunity details form.
Status	Displays a status for the correspondence. Values include Submitted, Pending and Completed.
Template	Displays the name of the selected template defined by your company, or your personal template.

5 Click in the Recipients list and proceed to "Editing a Template."

NOTE: You can create correspondence from any screen by navigating to the application-level menu and selecting File > New > Correspondence. This action takes you to the Correspondence screen where you can create your letter or label.

Editing a Template

You can edit an existing template to add a different personal message to each Correspondence request. By editing the template you only modify the template for the selected Correspondence request. Only an Administrator can make a global change to a template.

To open and edit an existing template

1. Navigate to the Correspondence screen.
2. In the Correspondence list, click New.
3. In the new correspondence record, click the select button in the Template field.
4. In the Pick Template dialog box, choose a template, and then click OK.

   The template name appears in the field.
5. Drill down on the hyperlink in the Template field to open it in Microsoft Word.
6. In Microsoft Word edit the template, and then select Save As to save the edited template to your desktop or to a shared network folder.
7. In the Correspondence record, click select in the Modified Template field to browse and add your edited template to the Correspondence record.

Inserting Templates into Correspondence Templates

You can insert one or more templates into your correspondence template. For instance, if you have a description of your company that you want to include in many correspondence templates, you can type this description in a separate file and insert the text into the correspondence you send. You can insert as many files into a correspondence item as you want, but each file name must be unique.

Your Siebel application supports inserting one level of files, but you cannot insert nested files. For instance, you can insert files called File1.doc, File2.doc, and File3.doc into a template called FollowUp.doc, but you cannot insert File1.doc into File2.doc and then insert File2.doc into FollowUp.doc. Each file must be inserted into the correspondence template independently.

The template into which you insert the file can be a public template created by an administrator, or a personal template that you created. Only Microsoft Word files can be inserted into Microsoft Office templates.

To insert a file into a correspondence template

1. Create a correspondence record.

   For more information, see "To create correspondence" on page 124.

2. In the Template Name field, choose the file that you want to insert.

3. Use Microsoft Word to edit the correspondence template in which you want the file to be inserted.

   Drill down on the hyperlink in the Template field to open the template in Microsoft Word.

4. Within the template file, locate a separate line at the location where the file should be inserted, and then enter the following text where [[<File Name>]] is the name of the inserted file.

   ```
   [[<File Name>]]
   ```

   NOTE: The file name must have the same name as the template into which it is inserted.

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5. Save the modified template to your desktop or on a shared network drive.

6. In the Modified Template field, select the modified template.

7. Click Generate.

   When you generate the correspondence, the file is merged into the correspondence.

Adding a Recipient

You must add or select one or more contacts as recipients before you can generate correspondence. If you are sending correspondence to someone who is not listed as a contact, you can add that individual in the Add Recipients dialog box. The individual is then added to the Contacts list and as a recipient for the selected Correspondence record.

NOTE: There is no maximum limit to the number of recipients that you can add to a correspondence item, however, the number of recipients affects performance and time required to generate the final document.

To add a recipient to correspondence

1. Complete the procedure for "To create correspondence" on page 124.
2. In the Recipients list, click Add.
3. From the Add Recipients dialog box, add recipients.

   Use one of the following methods:

   - To send correspondence to an existing contact, elect the recipient in the Add Recipients dialog box, and then click Add.
   - To send correspondence to a new contact, click New in the Add Recipients dialog box, complete the fields as needed, and from the menu, choose Save.

   NOTE: You can drill down on the hyperlink in the Last Name field to navigate to the Contacts screen's Activities list.

Enclosing Literature with Correspondence

You can select literature such as sales brochures, white papers, and data sheets from the Siebel Encyclopedia and associate the information with your correspondence. This functionality allows you to send and track items you enclose with correspondence.

To view available literature

1. Navigate to the Correspondence screen.
2. From the Show drop-down list, choose Literature Selection.
3. In the Explorer tree, click the plus sign (+) to expand the view of literature items in each category.

   The list at right provides detail for selected category items.
4. In the list, use Query to locate desired literature items.

NOTE: In the Explorer, when you drill down to the actual Literature item, the Add Enclosure button appears on the Literature list at right. Add Enclosure allows you to add the enclosure to the correspondence record. However, most users select the enclosure using the Enclosures list on the Correspondence screen.

To enclose literature with correspondence

1. In the Correspondence list, create a correspondence record.

   For more information, see "To create correspondence" on page 124.
2. In the Enclosures subview list, click Add.
3. In the Add Literature dialog box, select the literature item you want to enclose and then click Add.
4. In the Enclosures list, complete the fields for the enclosure.

5 To view the literature file, drill down on the hyperlink in the Name field.

You must have the corresponding application loaded on your computer to view literature files created using that application.

NOTE: If you are working in a disconnected environment (remote), you must have the literature files available in your local environment. If the Local check box is selected, you can work with the file in a remote environment. To download the file from the server the next time you synchronize, select the Request checkbox when you add the Literature file.

Generating Correspondence

After you have created a correspondence item from a template, selected or added recipients, you can generate your correspondence. The Generate button is disabled after a correspondence is queued.

NOTE: You cannot edit and regenerate a document that has already been generated. Instead, specify modified document templates in the Modified Template field.

To generate correspondence

If you are creating correspondence in a *connected* environment (network), you can follow Step 1 through Step 4.

If you are creating correspondence in a disconnected environment (remote) and have the Siebel Web Client installed locally on your computer, you can follow Step 1 through Step 3.

1 In the Correspondence list, create a correspondence record.

For more information, see "To create correspondence" on page 124.

2 Associate a recipient with the correspondence record.

For more information, see "To add a recipient to correspondence" on page 129.

3 In the Correspondence list, select the letter, and then click Generate.

A draft of the letter appears if you are in a *disconnected* environment.

4 Click Update to generate correspondence from the server if you are working in a *connected* network environment.

The status of the correspondence refreshes when you click Update. Correspondence Status values include In Progress, Generating, Completed, and Failed.

If the status is Failed, an error message appears in the Document Error or Label Error fields.

Previewing Letters and Labels

You should preview the letter before sending it to a contact. If you do not use a fulfillment center, you can print a letter or label from the preview screen. You must generate correspondence before you can preview it.

NOTE: If you use a fulfillment center, you do not have to print the letter, but you should still preview it before sending it.

To preview a letter or label

1 Navigate to the Correspondence screen.

2 In the Correspondence list, select the correspondence you want to preview.

- Drill down on the Merged hyperlink in the Generated Document field to display a document in your word processor, if you have the word processor installed locally.
- Drill down on the Merged in the Generated Label field to display labels in your word processor, if you have the word processor installed locally.
- In the Correspondence list, click the menu button and choose View (HTML) to display a document in your Web browser if you do not have the word processor installed locally.

- In the Correspondence list, click the menu button and choose View Label (HTML) to display labels in your Web browser if you do not have the word processor installed locally.

The letter or label appears, with the recipient's name and address information merged into the template.

Sending Correspondence to a Fulfillment Center

If the fulfillment center is part of the Siebel Enterprise, you can submit fulfillment requests from the Correspondence list.

To send correspondence to a fulfillment center

1. Navigate to the Correspondence screen, and from the Show drop-down list choose My Correspondence Requests.
2. In the Correspondence list, select the correspondence that you want to submit to your fulfillment organization.
3. In the Correspondence list, click the Fulfillment Center drop-down list and then select the appropriate fulfillment center.
4. Click Submit.

   The Document Status changes to In Queue.

Monitoring Fulfillment Requests

When you submit correspondence to a fulfillment center, its status is set to Submitted. When your correspondence request is fulfilled, the fulfillment center updates the status to Done, which associates an activity with each recipient (contact). You can monitor the status to determine the date and time that your correspondence was sent and time your follow-up calls and sales visits accordingly.

To monitor fulfillment requests

1. Navigate to the Correspondence screen.
2. In the Correspondence list, select the correspondence record, and then verify that Done appears in the Status field.

Recalling Correspondence

You can recall correspondence records that you have submitted, as long as they have not been fulfilled. You can recall correspondence to modify it and re-submit it for fulfillment.

To recall correspondence

1. Navigate to the Correspondence screen.
2. In the Correspondence list, select the correspondence to recall.
3. Click the menu button, and then choose Recall.

   The correspondence status reverts from Submitted to In Progress.

Creating a Personal Correspondence Template

You can create your own letter templates that are not accessible to other users. Although you can create a template from scratch, it is much easier to create a template based on an existing correspondence template. This approach allows you to reuse elements from the existing template, such as a company logo or mail merge fields, in your personal template.

You must have Microsoft Word installed locally to create a personal template.

NOTE: Mail merge fields are placeholders for information that is merged from your Siebel application into correspondence. Creating mail merge fields from scratch (not copied from a template) is a complex process that requires the assistance of your Siebel administrator.

To create a personal template

1. Navigate to the Correspondence screen.
2. From the Show drop-down list, choose Personal Templates.
3. In the Personal Templates list, click New.
4. In the new record, click the select button in the Template Name field.

   The Add Attachments dialog box appears.

5. In the File Name field, click Browse.
6. In the Choose File dialog box, select the document and then click Open.
7. In the Add Attachment dialog box, click Add.

   The template name appears in the File Name field, and the Active, Size, Type and Modified fields are populated with information about the file.

   This template appears in your list of templates.
8. In the Templates list, drill down on the file name hyperlink to view the template.

Batch Printing

To batch print, you select correspondence items and then click the menu button and choose Print. The Print menu item is only active if the selected correspondence record has a value of Completed in the Document Status column.

The Print menu item in the Correspondence and Fulfillment screens is configured for client-based printing. However, your administrator can configure server-based printing in addition to (or instead of) client-based printing.

Check with your system administrator to determine which print method is available.

Using Client-Based Batch Printing

When you use client-based batch printing, the Siebel application launches Microsoft Word on your client system. The application retrieves the document from the Siebel File System and prints it to the default printer configured for your desktop session. To use this feature, verify that the following prerequisites have been met:

- Microsoft Word must be installed on the client system.
- Internet Explorer must be configured to start Microsoft Word.
- The default printer must be configured for your desktop.

To configure Internet Explorer to allow client-based batch printing

1. Start Internet Explorer and log on to the Siebel Sales application.
2. In the Internet Explorer, select Tools > Internet Options.
3. Select the Security tab.

   The security zone used by Siebel is highlighted (either Local intranet, or Trusted). Verify that any other URL in this zone can be trusted with extra security privileges.
4. Select Custom Level.
5. In the Security Settings dialog box, find the option Initialize and script ActiveX controls not marked safe. Change the setting to either Enable or Prompt.

6 Click OK, and then click Yes to answer the question Are you sure you want to change the security for this zone?

7 In the Internet Options dialog box, click OK.

To add a printer connection to your desktop

1 Select Start Menu > Settings > Printers.

2 Double-click the Add Printer icon.

3 Click Next on the Welcome screen.

4 In the Local or Network Printer screen, select Network Printer, and then click Next.

5 In the Locate Your Printer screen, select Type the Printer Name and either type the network name of the printer, or click Browse and select the printer.

6 Click Next.

7 In the Default Printer screen, choose either Yes, or No, and then click Next.

8 In the Completing the Add Printer Wizard screen, click Finish.

To change the default printer

1 Select Start Menu > Settings > Printers.

   The current default printer is marked with a check mark.

2 Select a new default printer by right clicking on the desired printer and choosing Set as Default.

To print documents using client-based printing

1 Close open files in Microsoft Word.

2 From the Siebel Sales application-level menu, choose View > Site Map > Correspondence or Fulfillment.

3 In the Correspondence list, select one or more records.

   Each selected correspondence record must have a Document Status of Completed.

4 In the Correspondence list, click the menu button, and then select Print.

The selected documents are printed to the configured default printer.

Using Server-Based Batch Printing

Server-based batch printing sends a printing request to the Siebel Document Server. The document is then sent to the printer specified in User Preferences. If you do not specify a printer, the document is printed on the default printer configured by the System Administrator.

To specify a printer for server-based batch printing

1. From the application-level menu, choose View > Site Map > User Preference > Correspondence.
2. In the Default Printer field, enter the network name of the printer used for Correspondence.

   The network name should contain both the printer server name and the printer name as shown in the following example.

   \\printer_server_name\printer_name
3. In the Printer Driver field, enter the name of the printer driver used to generate an intermediate file during the printing process, and then click Save.

   The System Administrator should provide you with a list of printer drivers and their associated printer types. Select the Printer Driver associated with the printer you previously specified in Step 2.

To print documents using server-based printing

1. From the application-level menu, choose View > Site Map > Correspondence or Fulfillment.
2. Select one or more records in the Correspondence list.

   Selected correspondence must have a Document Status of Completed.
3. In the Correspondence list. click the menu button and then select Print.

   The selected documents are printed to the default printer specified in User Preferences.

Literature 11

This chapter explains how to use the Literature screen and associated views to distribute documents, white papers, marketing brochures, and other forms of literature by email or fax.

Literature Overview

You can use literature to view and distribute white papers, marketing brochures, competitive data, product information, and other types of documents that your company determines are appropriate for the literature repository.

Literature is stored and managed online, which allows you to view the most recent versions through the shared repository. Typically, content experts at your company maintain the literature repository by updating files, adding new ones, and removing outdated ones.

Business Scenario

A sales representative reviews sales and marketing information stored in the literature repository. The sales representative's company sells a large number of products, and literature allows the representative to view and distribute sales brochures, white papers, and other product information.

A customer calls to ask the sales representative for specific information on a new computer hardware component that the representative's company recently advertised. The sales representative can use literature to research the hardware specifications and features while the customer is on the telephone. The representative can also email or fax product literature to the customer while the customer and representative are viewing the literature online.

Working with Literature

Literature can be associated with a product, an account, or a competitor. You use the Literature screen to perform the following tasks:

- View a list of available marketing and sales information
- Display a document in the application in which it was created
- View and print a document.
- Send a document by email or fax

Viewing Literature

To view literature

1. Navigate to the Literature screen.
2. In the Literature list, select the literature item you want to view.
3. Drill down on the Name hyperlink.

   The application that was used to save the document opens, and the document appears.

Sending Literature by Email or Fax

You can send a literature item as an email attachment or a fax message from within your Siebel application.

To send literature

1. Navigate to the Literature screen.
2. In the Literature list, select the literature item you want to send.
3. To send the literature as an email, select File > Send > Email from the application-level menu.

   The Send Email dialog box appears with the literature item added as an attachment.

4 To send the literature as a fax, select File > Send > Fax from the application-level menu.

The Send Fax dialog box appears with the literature item added as an attachment.

5 In the dialog box, fill in the fields as needed and then click Send.

NOTE: You can attach additional files to the email by clicking the attachment icon and following the procedure to attach a file. For more information on attachments, see *Fundamentals, MidMarket Edition*.

Viewing Product Literature

The Product Literature Explorer allows you to navigate through your company's product lines and services and view individual literature items.

NOTE: You can also use the InfoCenter Explorer to find product information and other types of literature.

To view product literature

1 Navigate to the Literature screen.

2 From the Show drop-down list, choose Product Literature.

The Product Literature Explorer appears.

3 In the Product Lines Explorer list, select the product line, and then click the plus sign (+) next to each folder in the hierarchy of folders until you reach the Literature folder.

Clicking the plus (+) sign next to the Literature folder displays a list of literature items associated with the product. The list appears to the right of the explorer.

4 In the Literature list, drill down on the Title hyperlink.

The literature item opens in the format in which it was saved.

Categories 12

This chapter explains how sales professionals can use the Categories screen and associated views to track information about accounts, opportunities, and contacts.

Categories Overview

Categories allow you to track information about accounts, opportunities, and contacts using categories you define. Later, you can use these categories to sort and search for specific criteria. Using categories, you can enter information that is important to your personal sales approach and style. You can share this information with the sales team, or keep it private.

Business Scenario

A sales representative wants to track information to help manage relationships with current and potential customers. Categories provide the sales representative with a way to store additional information about an account, opportunity, or contact. Either the sales representative can designate categories as private, or she can share them across a sales team.

The sales representative can track the most active accounts by creating a category called Hot Accounts and selecting that category for each account that she wants to add to her active list.

The sales representative also can view a list of all the opportunities she has closed over a period of time. If she sets up a Closed category, she can see which opportunities she has closed during the previous year.

Sales professionals can use categories to track personal information about contacts. For instance, a sales representative can record hobbies, such as golf or tennis, and designate that category for contacts she plans to invite to her company-sponsored sporting events. In addition, she can track family names or add contacts to a category called Holiday List that allows her to create a mailing list.

Using Categories

You can use account categories to define and track sorting criteria for your personal use or to share across your sales team. Your company can define business processes to determine what categories mean and how to associate value with them.

Adding an Account Category

You can add categories to accounts, contacts, and opportunities.

To add an account category

1. Navigate to the Accounts screen.
2. In the Accounts list, select the account for which you want to add a category.
3. Click the Categories view tab.

   The Account details form appears with the Categories list.
4. In the Categories list, click New.
5. In the new record, click the select button in the Category field.
6. In the Pick Category dialog box, choose an existing category, or click Query to locate a category, and then click OK.

   NOTE: In the Pick Category dialog box, click New to create a new category, and then complete the category name, description, and public fields to add the new category to the Pick Category dialog box.
7. Complete the category fields, as needed.

   The following table describes fields in the Category record.

Field	Comments
Category	Displays a dialog box that allows you to select an existing category or add a new one.
Category Rank	Displays value that allows you to further define the category. The rank can be any numeric value.

Field	Comments
Comments	A text field that displays additional information.
Private	A check box which, when selected, restricts sales team members from seeing how you have categorized the account. When the check box is selected, the category is private. Clear the check box to designate the category as Public allowing access by team members.
Value	Displays a numeric value that allows you to assign a value to the category.
Value Rank	Displays a numeric value that allows you to assign a rank to the value.

NOTE: You can add a Contact or Opportunity category using the same procedure. Navigating to the appropriate screen and then follow Step 3 through Step 7 in the procedure.

Searching for an Account Category

You can search for specific accounts, opportunities, and contacts using the categories you and your team have defined.

To search for an account category

1. Navigate to the Categories screen.
2. In the Categories list, click Query.
3. In the Category form, click the select button in the Category field.
4. In the Pick Catalog dialog box, choose a category, and then click OK.
5. In the Categories query form, click Go.

   A list of accounts with the selected category appear in the Categories list.

NOTE: Follow the same procedure for the Opportunities, Contacts, and Personal Categories. Change the Show filter to search for the appropriate category.

Quotes 13

This chapter explains how to use the Quotes screen and associated views to create quotes, add line items and details, apply manual discounts, and generate sales orders.

Quotes Overview

When a customer is ready to purchase a product or service, you provide the customer with a quote for the total cost. A quote is a formal offer for products and services provided to a prospective customer that includes specific prices and related payment terms. Your Siebel application allows you to accurately create a quote for a customer and deliver it promptly.

Business Scenario

A sales representative uses quotes to create formal offers to prospects for a variety of products and services his company provides. Siebel Sales helps the sales representative develop accurate quotes without being encumbered by manual verification. The sales representative can access information and resources in one central location, which eliminates the need to cross reference pricing books, and he can create a quote record and add line items to configure a specific quote. You can also create a package of line items.

Developing Quotes

Quotes include effective dates, price lists, and discounts used in pricing products and services. Before you can work with the line items and details of a quote, you must create a quote, which can be associated with an opportunity.

NOTE: Quotes also can be created from the Quotes screen, the Accounts screen, or the Contacts screen. The following procedure discusses creating quotes from the Opportunities screen.

Creating a Quote

Use the following procedure to create a quote, using the Opportunities screen. Quotes can also be created by navigating directly to the Quotes screen.

To create a quote

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity, and then click the Quotes view tab.
3. In the Quotes list, click New, and complete the fields for the record.

   Siebel Sales copies the account or opportunity information into the quote. If a price list is associated with the account or opportunity, it is also entered. Your name automatically appears as the Sales Rep. In addition, values are automatically generated for the following fields on the More Info form.

   The following table describes the fields in the Quote record that must be completed.

Field	Comments
Active	A check box indicating whether the quote is active. When you create a quote, it is automatically marked as active. The quote must be designated as active before it can be updated or files can be attached to it.

Field	Comments
Created	The date the quote was created. Siebel Sales automatically sets the value for an active quote to the Effective As Of (Start Date) + 30 days.
Currency	Defaults to the currency associated with the price list.
Effective As Of	Defaults to the created date. You can change this date, if necessary.
Effective Through	Defaults to the effective date plus 30 days. You can change this date if the quote is effective for a different length of time.
Name	Defaults to the unique number assigned to the quote at creation.
Quote #	This unique system-generated number is assigned to the quote at creation.
Revision	The number of revisions associated with the quote. At quote creation, this value = 1.
Status	The default status is In Progress. You can change the status as the quote advances. Examples of status are Approved, Rejected, Expired, Order Placed, and Active.

4. If account information was not automatically entered into the quote, enter the account name.

5. Enter a name for the quote.

   If you do not enter a name for the quote, the quote number is automatically assigned as the name.

6. In the Price List field, click the select button to select a price list for the quote, if one is not assigned automatically through association with the account.

7. Click the show more button if you want to apply a Discount to the line items you add to the quote.

   The discount you enter in this field is used instead of any pricing rules associated with a price list.

Using Auto Quote

If you are working with an opportunity for which the products and solutions have already been specified, there is a faster method to generate a quote. You can use the Auto Quote button.

NOTE: Only products with the Auto Quote flag set are available using Auto Quote. The Auto Quote (check box) flag for products is set in the Opportunity screen's Products view.

To use Auto Quote

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity associated with the quote, and then click the Quotes view tab.
3. In the Quotes list, click Auto Quote.

   A new quote record appears with some fields automatically populated. For more information, see "To create a quote" on page 148.
4. Enter a name for the quote in the Name field, and then select the appropriate price list in the Price List field.
5. In the Status field, click the select button to choose a valid status.
6. (Optional.) Drill down on the quote name to display the Quote Line Items view, where you can perform further work with the quote.

   You can update opportunities with information from a quote. For more information, see "To update quote information to the opportunity" on page 161.

NOTE: You can create quotes in the Opportunities screen's Quotes view, the Accounts screen's Quotes view, or the Quotes screen.

Line Items and Details

Drilling down on the quote name in the Quote screen's Quote list allows you to add line items and additional quote details and information.

NOTE: You cannot query for packaged products in Quotes screen's Line Items view.

Adding Line Items

Products associated with quotes in the Opportunity screen's Products view appear automatically as line items with any applicable discounts if you use Auto Quote to create the quote.

Using Line Items, you can perform the following tasks:

- Add new products to a quote as Line Items
- Reprice using the most current price list and automatic price adjustments using the menu button's Reprice command
- Save combinations of packaged items
- Associate services with the quoted products
- Apply manual price adjustments to the Line Items

To add a line item

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity with which the quote is associated.
3. Click the Quotes view tab.
4. In the Quotes list, select the quote, and then drill down on the Name hyperlink.

   The Line Items list and the Totals subview appear.
5. In the Line Items list, click the menu button, and then click New Record.

6 In the Line Items list, click the select button in the Product field and choose a product from the Pick Product dialog box.

NOTE: To enter more than one line item, repeat Step 5 through Step 6 for each item.

The following table describes the fields that are automatically generated for the Line Item record.

Field	Comments
Attributes	A text description or abstract of the product offering.
Extended Net Price	If the quantity reflects a number of products for the line item, then the extended net price reflects the total for the number of products listed.
Extended Qty	Displays a default value of 1. Reflects the actual number of units contained in the component product, packages, or bundle that is ordered. This field differs from the Qty field for hierarchical products.
Item Net Price	The price for an individual item. When you are referencing component products or packages, the Item Net price is the net price of the top level only and does not include the rollup.
Part #	A unique number assigned to the product you selected.
Qty	Displays a default value of 1. You can edit this field to reflect the number of products associated with the line item. Reflects the actual number of units of a component product, package, or bundle that is ordered.
Start Price	The undiscounted price for an individual item from the price list associated with the quote.
Unit Net Price	Net price of the item and the rollup of the unit net price of its immediate children. The net price and unit net price for simple products are the same.

To update the prices and totals for your line items

1. In the Line Items list, click the menu button, and then choose Reprice to manually reprice a single line item.

   It is not necessary to routinely use Reprice and Reprice All after adding line items.

2. In the Line Items list, click the menu button, and then choose Reprice All to reprice all line items.

Using Browse Catalog to Add Line Items

An alternative way to add line items to a quote is by using the Browse Catalog feature, which takes you to the Product catalog. In the Product catalog you can add additional products or services to the customer's existing quote.

NOTE: The Browse Catalog feature is only available to you if your company has purchased Siebel eSales, MidMarket edition. For more information, see *Siebel eSales Administration Guide, MidMarket Edition*.

After you finish adding the additional products and services, click View Quotes to update the information.

You also have the ability to add line items manually without using the Browse Catalog feature.

To use Browse Catalog to add Line Items

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity associated with the additional quote information.
3. Click the Quotes view tab.
4. In the Quotes list, select the quote, and then drill down on the hyperlink in the Name field.
5. In the Quote form, click Browse Catalog.

6 In the Catalog's Browse list, select each product to add by supplying the quantity and clicking Add to Cart.

7 After the desired products have been added, click View Details in the Catalog view to return to the Line Items list.

Using Add Items to Add Line Items

Use the Add Items feature to add multiple items, and specify the quantity and attributes for those items.

To add a product to a quote using Add Items

1 Navigate to the quote to which you want to add items.

2 Drill down on the quote name to display the Line Items list.

3 In the Line Items list, click Add Items.

4 In the Pick Products dialog box, select the products to add to the quote.

   a In the Order Qty field, enter the quantity for each product, and then click Add or press the tab key.

   b To specify attributes for a product, click Attributes, complete the dialog box, and then click OK.

   c When you are finished specifying product quantity and attributes, click OK.

   The products appear in the Line Items list.

Adding Items One at a Time

If you want to add products one at a time to the Line Item list, and you already know the product name, you can use the New Record command accessed by clicking the menu button.

To add items one at a time

1 Navigate to the quote to which you want to add items.

2 Drill down on the quote name hyperlink to display the Line Items list.

3. In the Line Items list, click the menu button, and then choose New Record.
4. In the Line Items list, enter the product name in the Product field.
5. (Optional) Make any necessary changes to the quantity or attributes.
6. (Optional) Enter discounts and price adjustments.

Using Templates to Add Line Items

Product selection templates are groups of products and attributes that have been saved for reuse. Some product selection templates are public, and available to anyone using the Siebel application. Other product selection templates are private, and are available only to you. Private templates are those you create from an existing quote or order.

To add all the items in a template to the current quote

1. Navigate to the quote to which you want to add items.
2. In the Quote header summary, click Select Template.
3. In the Product Selection Template dialog box, select the template and click OK.

   The items and associated attributes are copied into the quote or order.
4. Make any additional changes you want to the line items.

To add some of the items in a template to the current quote or order

1. Navigate to the quote to which you want to add items.
2. In the Quote summary form, click Select Template.
3. In the Product Selection Template dialog box, drill down on the name of the template from which you want to select items.

   The Product Template List appears, and the Product Template Item List shows all the products in the template.
4. Select the products you want to add to the current quote, and then click Add Selected Items.

   The quote or order screen appear, and the items you selected appear in the Line Items list.

Adding a Package of Line Items

In the Line Items list you can create a product bundle called a *package*. The package unit net price is the rolled up price of its bundled component products. If you discount the price of a component product or change the quantity of a component product, the price difference is automatically reflected in the unit net price and the extended price for the package. After you a package to a quote, you can add individual product items to the package and renumber the items.

To add a package of Line Items

1. Navigate to the Quotes screen.
2. In the Quotes list, locate the name of the quote to which you want to add a package of products, and then drill down on the Name hyperlink.
3. In the Line Items list, click the menu button, and then click New Record.
4. In the line item record click the select button in the Product field.
5. In the Pick Product dialog box, type Package, and then select the package product.
6. In the Line Items list, click the menu button, and then select Save Record.

To add a product to a package of line items

1. Select the package item, click the menu button, and then choose New Record.

   A new line item row appears.

2. In the line item row, add the first product from the Product list to the package you created.
3. Follow the procedure for "To add a line item" on page 151.
4. (Optional) Modify quantities and discounts for products in the package.
5. Select the new product line item, and then click the Indent button.

   The icon and number in the Sequence column change to reflect the addition of a product line item to the package.

   The Outdent button removes products from packages.

6. To add more than one product to a package, repeat Step 1 through Step 5 for each item.

Line Item Details

For each line item in a quote, the Line Item Detail form allows you to view and modify data. Using Line Item Details, you can apply a manual discount to a line item. After you have priced all line items in a quote, you can view the total of all discounts applied to each line item by clicking the Totals subview tab.

Adding a Write-In Product

You can create a write-in product for items not included in the price list.

When a product is not listed in the price list and you need to add the information manually, you create a write-in product.

To add a write-in product

1. Navigate to the Quotes screen.
2. In the Quotes list, select the quote, and then drill down on the hyperlink in the Name field.
3. In the Line Items list, click the menu button, and then click New Record.
   - **a** In the Product field, click the select button.

     The Pick Product dialog box appears.
   - **b** In the Product field, type *Write* and then click Go.
   - **c** In the Pick Product dialog box, select Write-In Product and then click OK.

     The Part # and Qty fields are automatically populated.
4. In the Line Items list, click the menu button, and then click Save Record.
5. Click the Line Item Detail view tab.
6. In the Line Item Detail form, complete the Disc Price field.
7. Select the Keep Discount check box.
8. In the Line Item Detail form, click the menu button, and then click Save Record.

NOTE: The Keep Discount check box allows you to override pricing rules.

Applying a Manual Discount

You can apply a manual discount to an entire quote or to any line item in a quote. If you apply a manual discount (a percentage) to an entire quote, the discount percentage applies to each line item, and the result is reflected in the price for the entire quote.

If you enter a manual discount for a line item and select Keep Discount flag, your item manual discount overrides the quote level discount for that line item. Manual price adjustments and automatic (system-applied) price adjustments function independently. The Keep Discount flag determines whether the line item or the automatic discount applies.

To avoid automatically overwriting a manual discount the next time you click Reprice or Reprice All, make sure the Keep Discount check box is selected.

To apply a manual discount to an entire quote

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity with which the quote is associated.
3. Click the Quotes view tab.
4. In the Quotes list, drill down on the hyperlink in the Name field.

   The Quote form appears, showing header data for the quote.

5. In the Discount field of the Quote form, select the discount (a percentage value) that you want to apply to the existing quote.

   The percentage discount is applied to each line item, and the Keep Discount check box is selected for each line item. Selecting the keep discount option prevents further modifying of the price after the manual discount has been applied.

To apply a manual discount to a line item in a quote

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity with which the quote is associated.

3. Click the Quotes view tab.
4. In the Quotes list, drill down on the Name hyperlink.

   The Quote form appears, showing header data for the quote.
5. Click the Line Items view tab.
6. In the Line Items list, select the line item that you want to manually discount.

   Discount information for the selected line item appear in the Line Items Detail form.

   - Discount Amount indicates the amount of any applied discount resulting from (automatic/non-manual) adjustments.
   - Percentage Discount indicates the percentage discount for the line item.

     The Keep Discount check box is not automatically selected. The check box is selected when discounts are applied using the Quote header.

   NOTE: Manual discounts applied to the entire quote do not appear in the line item discount fields, but they are reflected in the net price field and the Net Disc % field for the line item.

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7. In the Line Items Detail form, enter the discount or override price that you want to apply to the selected line item.

   - To enter a discount percentage, use the Disc % field. This overrides other discounts.
   - To enter a discount amount, use the Disc Amount field. This subtracts the dollar amount from the starting price.
   - To enter a new price that overrides any other discounts, enter the amount in the Disc Price field. Use this field whenever you want the discount to be the final price.

   The Discount percentage or the Discount Price you entered is applied to the line item.

Renumbering Line Items

After you have added all the line items for a quote, you can change the sequence of the items. Items appear in numbered sequence for orders and reports, and you may want to renumber them using a sequence that makes sense to your prospect.

To renumber line items

1. Navigate to the Quotes screen.
2. In the Quotes list, drill down on the Name hyperlink of the quote you want to renumber.
3. In the Line Items list, navigate through the columns until you see the Line field.
4. In the Line field for each item, renumber as desired.
5. Click the up or down arrow on the Line field to sort the line numbers in ascending or descending order.

   This action re-sorts the list based on the numbers you assigned in Step 4. Clicking the menu and choosing Renumber only generates sequential integer numbers so that your items now appear neatly sequenced.
6. In the Line Item List, click the menu button, and then click Renumber.

   The line items appear in the updated sequence, as shown in the following figure.

7. In the Line Item List, click the menu button, and then click Save Record.

Deleting Line Items

Use the following procedure to remove line items from your quote.

To delete line items

1. Navigate to the Quotes screen.
2. In the Quotes list, select the quote for which you want to delete the line item.
3. In the Quotes list, drill down on the hyperlink in the Name field.
4. In the Line Items List, select the item, click the menu button, and then choose Delete Record.
5. In the Quotes form, click Update Opportunity.

NOTE: The first time you delete a line item, the product is not deleted in the Opportunity view. A product is only deleted from the Opportunity products when the associated quote number is equal to the quote number of the quote from which you are updating. The first time you click Update Opportunity the quote numbers are not yet assigned to the Opportunity Product. When you click Update Opportunity the quote numbers are assigned, the opportunity product is identified, and the deleted quote is deleted in the opportunity.

Updating an Opportunity

After you have added the appropriate line items and completed the quote, you need to update the opportunity with the quote information. It is important to keep your opportunity information in sync with your quote information to maintain accurate forecasts and charts.

To update quote information to the opportunity

1. Navigate to the Quotes screen.
2. In the Quotes list, select the quote for which you want to update the opportunity, and then click Update Opportunity.

   The new or modified products and prices appear in the opportunity.

Using Delta Quotes

When you create a quote, you can add to or make changes to the customizable products the customer has already purchased. Generally, these products, which are also called customizable assets, have attributes and features that can be modified. For instance, a company has purchased several hundred computers, which can have different specifications for drive capacity, memory, and peripherals that can be upgraded.

Delta Quotes differ from Favorites in that only new or changed items have a price. Unchanged items have no price associated with them. When you add a Favorite to a quote, all the items in the customizable product have a price.

Favorites are new products being sold for the first time. Delta Quote products are items being sold as add-ons or replacement components for products you have already sold. Using the computer sale example, you can provide the customer's company with a delta quote that includes additional memory or other upgrades after the customer has owned the computers for a while. You can create a quote and select the customer's customizable asset, which in this case is the computer model. Then, you can configure the asset by adding or removing items and saving your changes.

You can add a customizable asset to an existing quote as described in the following procedure.

To add a delta quote

1. Navigate to the Quotes screen.
2. In the Quotes list select the quote to which you want to add a delta quote.
3. Click the Line Items view tab.
4. Click the menu button, and then choose Delta Quote.

   The Customizable Asset dialog box appears, displaying all customizable product assets that the product administrator has configured for the account.
5. Locate the asset you want to add to the quote, and then click OK.

6. Highlight the customizable asset and click the Customize button in the Line Items list.

   The configuration of the customizable asset displays in the session's selection pages.

7. Revise the configuration of the customizable asset by making selections and click Done to return to the Quote list.

   The revised configuration displays in Quotes screen's Line Items view.

Viewing Delta Status for a Quote Item

All the items in the revised asset receive a status when they are copied to the quote after a configuration session. The status tells you whether the item was changed during the configuration session.

Table 6 describes the Delta Status values.

Table 6. Delta Status Values

Delta Status	Comments
Existing	All items that were not changed. These items display no price.
Modified	All items for which attribute settings have changed. All items with a status of Modified are priced as new items.
New	All items that have been added or for which the quantity increased. If the quantity of an item increased, the original quantity is shown with a status of Existing. A second entry in the quote shows the increase, has a status of New, and displays a price.
Removed	All items that were removed or decreased in quantity. If the quantity of an item is reduced, the new quantity appears with a status of Existing. A second entry in the quote shows the reduction and has a status of Removed.

To view the delta status of an item in a delta quote

1. Navigate to the Quotes screen.
2. In the Quotes list, select the quote for which you want to view details.
3. Click the Line Items view tab and select the item for which you want to view status information.
4. Click the Line Item Detail subview tab.

   The Delta Quote status displays in the Delta Status field.

   You may need to click the show more button to see the field.

Using Favorites

Favorites are packages that you have created and want to reuse at another time for other quotes. For instance, you notice that there are several common configurations for the PC computer system that you sell. Rather than create these manually for each quote, you can create one and save it, then reuse it the next time you need to produce a similar quote.

For information on the differences between a Favorite and a Delta Quote, see "To add a delta quote" on page 162.

Saving a Favorite

After you have created a specific product package, you can save it to use again.

To save a favorite

1. Navigate to the Quotes screen.
2. In the Quotes list, drill down on the hyperlink in the Name field.
3. In the Line Items view, click the menu button, and then choose Save as Favorite.

NOTE: This assumes that you have already entered line item information and you want to reuse the information.

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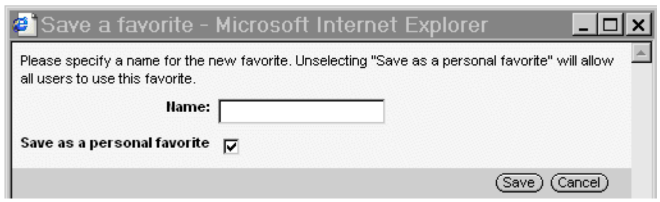
4 In the Save as Favorites dialog box, enter a name.

The following figure shows the Save a Favorite dialog box, with fields for a name and the Save as a personal favorite check box. Clearing the check box allows all users to use this favorite.



5 In the Favorites dialog box, click Save.

Using Favorites Manager

The Favorite Managers permits you to access previously saved package bundles that were used in a quote.

To use Favorites Manager

1 Navigate to the Quotes screen.

2 In the Quotes list, drill down on the hyperlink in the Name field.

3 In the Line Items list, click the menu button, and then choose Favorite Manager.

4 In the Favorites dialog box, select the favorite, and then click Start from Favorite.

The favorite you selected appears in the Line Items list.

5 In the Line Items list, click Customize to change the package.

To save this modification as a favorite, see “To save a favorite” on page 164.

Adding Payment and Billing Information

After completing the sales order, you can enter payment and billing information. You can send a customer an order at an address that differs from the main address associated with either the account or the contact information and you can enter an address for the order without updating the customer's permanent address.

To add billing, payment, tax and terms information

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity with which the quote is associated.
3. Click the Quotes view tab.
4. In the Quotes list, drill down on the quote name hyperlink.
5. Click the Payments view tab.
6. In the Payments form, complete the necessary fields.

   NOTE: The billing address is automatically populated based on the account information. To bill to a different address associated with the account, or to add a new address, click the select button in the Bill to Address field. The Bill To Address dialog box appears, allowing you to edit, add or select an address.

To add shipping information

1. Complete Step 1 through Step 4 in the previous procedure.
2. Click the Fulfillment view tab.

   The shipping address is automatically populated based on the account information.

3. To ship to a different address associated with the account, or to add a new address, click the select button in the Ship to Address field.

   The Ship To Address dialog box appears, allowing you to add or select an address.

Revising a Quote

You can make changes to an initial quote to keep it updated with the appropriate products, price lists, discounts, and so on. During negotiations with a customer, you can add or delete products from a quote and compare features and price.

The Revise feature allows you to edit or revise your original quote. Revisions do not create a new quote, but instead add a revised quote to the list associated with the opportunity.

To revise a quote

1 Navigate to the Opportunities screen.

2 In the Opportunities list, select the opportunity with which the quote is associated, and then click the Quotes view tab.

3 In the Quotes list, select the quote and then click Revise.

A new quote, with the same quote number, appears beneath the one you selected to revise.

4 Revise the information as needed, and then click Save.

The following figure shows both the original quote record and the revised quote record in the Quotes list. You can verify the revision by looking in the Revision column.

NOTE: When you revise a quote, the original quote becomes inactive and read-only.

Creating Orders from Quotes

After you complete the initial quote and the customer agrees to the products and prices, you can create a sales order.

To create an order from your quote

1. Navigate to the Quotes screen.
2. In the Quotes list, select the quote for which you want to generate an order.
3. Click the Orders view tab.
4. In the Orders list, click New.

   The order inherits field values from the quote.

5. In the Type field, select Sales Order from the drop-down list.
6. In the Orders list, drill down on the Order # hyperlink.

   The Orders line items view appears.

7. In the Line Items list, click New to add order line items.

Target Account Selling 14

This chapter explains how the Target Account Selling (TAS) module integrates with Siebel Sales to help sales professionals win more deals. The TAS module provides automated support and coaching to help sales professionals in the following ways:

- Assess opportunities, relationships with key customer contacts, and their competitive position
- Develop competitive and relationship strategies to win the deal
- Execute the strategy and track progress against the action plan

The TAS opportunity management methodology is a separately licensed offering developed by Siebel MultiChannel Services. For information on TAS administrative tasks, see *Applications Administration Guide, MidMarket Edition*.

Target Account Selling Overview

The Target Account Selling software provides full support for the Target Account Selling (TAS) sales methodology from Siebel MultiChannel Services. Using the Target Account Selling methodology and the Target Account Selling software, sales professionals align themselves with the right people and develop winning sales strategies. TAS support allows you to assess opportunities, conduct organizational and competitive analysis, and develop and execute a winning sales strategy.

The Siebel Target Account Selling software module provides the following features:

- Full support for the Target Account Selling methodology.
- A TAS Coach to help sales professionals assess their opportunities, including Tips to reinforce key concepts in the TAS methodology.
- A TAS Coach that recommends what competitive strategy to take, and identifies the pros and cons of the recommended strategy.
- Automatic creation of the Organization Map that allows you to view both the formal hierarchy and lines of influence in the customer organization. This helps sales professionals develop relationship strategy.
- Support in identifying and ranking the decision criteria of each contact.
- Team planning to make sure that key Customer Milestones are addressed.
- Automatic creation of the TAS Opportunity Plan. The report can be configured to print selected sections.
- Automatic creation of the TAS Initial Plan.

Business Scenario

A sales representative meets with a customer and discovers a new opportunity. The sales representative plans to use the Target Account Selling (TAS) methodology from Siebel MultiChannel Services (MCS) to develop a sales strategy for this new deal. TAS is supported by his Siebel Sales application, allowing the sales representative to analyze the opportunity and its multiple decision makers.

Opportunity Assessment

The sales representative pulls up the opportunity within the Siebel Sales application and clicks the TAS view tab to begin the process. He sees several views that he can use to profile and assess the opportunity, develop his value proposition and competitive strategy, and create a detailed action plan to achieve his goals.

He begins by developing an overview of the opportunity. He enters some high-level information, including a profile of the account and the opportunity. This information provides strategic insight that his sales team can use and helps him to connect the project to the customer's business drivers. The sales representative also enters details about his goal for the opportunity, the solution he is offering, and the business value this solution provides. He continues by entering a description of the compelling event that is causing the customer to act. This helps him to determine the customer's sense of urgency to close the deal. He concludes by summarizing his high-level strengths and weaknesses for the deal.

Now that he has a general overview of the opportunity, he begins to assess his position using the TAS criteria that Siebel MCS has developed from analyzing the best practices of top sales professionals. He also rates the position of his key competitors using these criteria. He uses the TAS Coach on the Assessments screen to help him complete the assessment. The assessment helps him qualify the opportunity and understand his company's position in the deal.

Competitive and Relationship Strategy Development

Next, the sales representative begins to analyze his competitors for this opportunity and determine what strategy he should take to win the deal. He can use the TAS Coach, available from the Competitive Analysis screen, for competitive strategy recommendations.

He continues by analyzing the prospect's organization. He maps both the formal and informal structures so that he can be sure he is spending time with the right contacts. When he has completed his analysis, he automatically creates an organizational chart that summarizes his assessment and identifies key players and relationships he can use to close the deal.

Now that he knows who to talk to, the sales representative moves on to develop his relationship strategy. He enters the business and personal agenda for each contact. This preparation helps him to determine what message to deliver to each contact.

Strategy Execution

The sales representative is now prepared to develop his action plan to win the opportunity. First, he navigates to the Customer Milestones view to document key events or milestones in the customer's buying process. This view helps him plan the activities that he and his sales team should take to address the customer's requirements at each milestone. Then, he enters key action steps and resources needed and assigns the actions to members of his sales team. He can choose to have the activities appear in his calendar, activities, or to-do list, or in those of another assignee. He navigates to the PRIME Activities view where he can see all the activities he created to meet customer milestones, as well as add action items required to win the deal. He also makes some additional notes about the opportunity and makes the notes available for the entire team to view.

The sales representative's manager requests a copy of the TAS Opportunity Plan. The sales representative configures the report to display relevant sections of the Opportunity Plan, generates the report, and then emails it to his manager.

Using Target Account Selling

Siebel Target Account Selling (TAS) consists of eight views that automate the steps in the TAS methodology:

- Overview
- Assessment
- Competitive Analysis
- Organizational Analysis
- Relationship Strategy
- Customer Milestones
- PRIME Activities
- Notes

Information in these views appear in the TAS Initial Plan report.

Completing a TAS Overview

The Overview view provides a starting point that sales professionals can use to consolidate their observations about the account and opportunity. The Overview view is where salespeople begin as they work through the TAS methodology. Using this view sales professionals can profile their customers' important business initiatives and requirements. In addition, sales professionals can summarize the strategic goal, value proposition, and overall position. By completing the entry fields in the Overview view, sales professionals can share strategic account and opportunity insights with their sales teams.

To complete a TAS overview

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Target Account Selling view tab.
4. From the Show drop-down list, choose Overview.

5 In the TAS Opportunity Overview form, complete the necessary fields.

These fields are described in the following table.

TIP: Position the pointer on the icon to display information on the view.

Field	Comments
Customer’s Business Profile	Describe the customer’s business conditions. Identify the customer’s major lines of business, affiliations, products, and markets. Include information about recent mergers and acquisitions.
Customer’s Revenue	Enter the customer’s annual revenues or sales.
Profit	Enter the customer’s annual profit.
Fiscal Year End	Enter the month and day in which the customer's 12-month accounting period ends.
Opportunity Profile	Describe the customer’s project or application. Identify the customer’s business objectives for the project, the total cost and budget for the project, and how the project affects the customer’s overall business.
Goal	Describe your desired, long-term position with the customer. Identify how a closer relationship with you advances the attainment of their business goals. Also include the long-term gain for your business such as future or strategic value.
Customer’s Compelling Event	Describe what is driving the customer to make a decision or change the current situation. Identify the payback if the customer makes a change, or the consequences if they do not act. Note the specific date associated with the consequences or payback.
Our Solution	Describe the solution you plan to offer to the customer. Address how the solution works in the customer’s environment and how it meets their compelling event. Include any alliances or business partner solutions required to make it operational for the customer.

Field	Comments
Critical Success Factors	Identify actions you, the competition, and your customer must do for you to win this opportunity.
Our Unique Business Value	Describe your value proposition. Make sure it is specific to this customer, defines a measurable business result, and creates credibility by proving your ability to deliver. The value proposition should be confirmed with the customer and differentiate you from your competitors.
Our Strengths	Identify business, organizational, and political issues that give your sales team an advantage in the deal.
Our Weaknesses	Identify business, organizational, and political issues that could put your sales team at risk in the deal.

NOTE: If this is a new opportunity, you must create a new record and associate it with an account before you can enter text in the Customer's Business Profile field. For more information, see Chapter 4, "Opportunities."

Assessing an Opportunity

Sales professionals can use the Assessments view to evaluate the opportunity using criteria developed by Siebel MultiChannel Services. Assessments must be completed before determining the best strategy. An assessment focuses on the following four key questions:

- Is there an opportunity?
- Can we compete?
- Can we win?
- Is it worth winning?

Sales professionals assess the position of both themselves and their top competitors against these criteria. As the sales campaign progresses, sales professionals can repeat this assessment, and then compare the results to past assessments to evaluate and monitor their position at each sales stage.

The first few times you perform an assessment, use the TAS Coach to help you evaluate and answer each set of assessment questions. After you are familiar with assessment issues, you can perform an assessment using the Assessment form.

To begin an assessment

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the TAS view tab.
4. In the Target Account Selling form, from the Show drop-down list, select Assessments.

   The Assessments list includes all the assessments you and your sales team have performed to date. Use the Assessments list to compare opportunity assessments for your company and your competitors.

5. In the Assessments form, click New.
6. In the new record, the Assessment For field defaults to Our Company for self assessments. If you are assessing a competitor’s position, click the select button and choose the competitor.
7. In the Assessment form, click TAS Coach, and complete the assessment criteria questions. For more information, see “Using the TAS Coach” on page 177.

   If you have performed a number of assessments and are familiar with the criteria and methodology, use the Assessment form to rate the criteria.

Using the TAS Coach

The Assessment TAS Coach, shown in Figure 2, uses Siebel SmartScripts technology to help sales professionals evaluate opportunities. The explorer pane expands to display individual questions in each question set, and the form at right provides information on assessment considerations and rating selection.

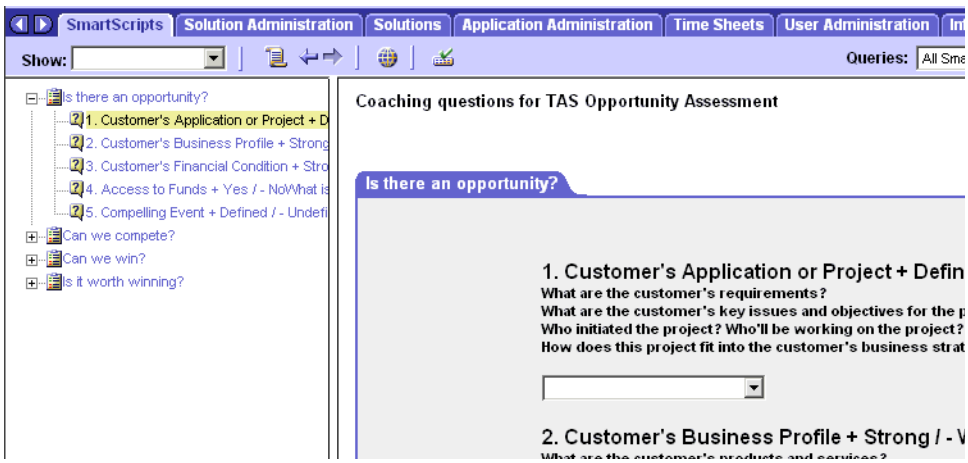


Figure 2. TAS Coach Screen

To perform an assessment using TAS Coach

1. Assess the position of each of the criteria in the Assessments list by selecting a plus (+), a minus (-), or a question mark (?) from the drop-down list.
2. Click Next to advance to the next set of criteria questions.

   Click Previous to return to criteria you have already assessed.

   Click Cancel to return to the Assessments view without saving the assessment.

   If you want to pause in the middle of a TAS Coach assessment, and then return to the assessment at a later time, click Finish Later. The assessment does not appear in the Assessments list until it is completed.

   Your assessment is saved in SmartScripts screen’s My Saved Session view. Use Site Map to navigate to the SmartScripts screen.

   If you do not have enough information to answer the question, select the question mark (?).

3. When you have rated all criteria, click Finish to return to the Assessments list.

NOTE: You must click Finish to save the criteria to the form.

Developing Your Competitive Strategy

The Competitive Analysis view helps sales professionals to develop competitive strategy. For each competitor, the sales team can evaluate strengths and weaknesses and anticipate the competitor's strategy. The view also allows the sales team to assess its own position against the competitor, and to develop its strategy to win the deal.

Use the TAS Coach to help you develop and refine your strategy. TAS Coach provides recommendations based on the information you enter.

NOTE: If you use the TAS Coach to refine your strategy, enter information in the Our Competitive Strategy field. If you are analyzing a competitor's strategy, enter the information in the Competitors list.

When you determine what your strategy will be, enter a summary in the Our Competitive Strategy text field in the Competitive Analysis view.

To add competitive analysis information

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Target Account Selling view tab.
4. In the TAS form, select Competitive Analysis from the Show drop-down list.
5. In the Competitors list, click New.

   A new row appears.
6. In the new record, click the select button in the Competitor field.
7. In the Pick Competitors dialog box, select the competitor to assess, and then click OK.

8 In the new Competitor record, complete the necessary fields.

Enter your strategy, based on what you think the competitor will do.

Using the TAS Coach for Competitive Analysis

The TAS Coach can help you develop a competitive strategy after you have completed the TAS Assessment for your company and competitors. You may need to refer to your assessment criteria ratings during a TAS Coach session, and may want to review or print the assessments before starting. See "Generating Reports" on page 191.

To use the TAS Coach for competitive analysis

1 Navigate to the Opportunities screen.

2 In the Opportunities list, select the opportunity.

3 Click the Target Account Selling view tab.

4 In the TAS form, select Competitive Analysis from the Show drop-down list.

5 In the Competitive Strategy form, click TAS Coach.

The TAS Coach screen appears, as shown in the following figure, detailing strategy types such as Fragment, Frontal, and Disengage, and includes a description of how to use the TAS coach.

6. During the TAS Coach session, answer each question presented, and then click the Continue hyperlink to proceed to the next question.

   During the session, an interim evaluation of each answer is provided, outlining the relevant issues that you must consider.

   Click the Back hyperlink to return to a previous question.

   At the conclusion of the session, TAS Coach recommends the type of strategy to take.

7. At the TAS Coach Recommends screen, drill down on the Click here for variations hyperlink for additional strategy options.

8. When you have completed the TAS Coach session, click Finish to return to the Assessments view.

   If you plan to use the recommendations, in the Competitive Analysis view enter the strategy information in the appropriate fields.

Conducting an Organizational Analysis

After completing additional assessments of the customer's organization to understand who the most influential people are and how to use these relationships, sales professionals can use the Organizational Analysis view to create formal and informal organizational charts that visually summarize their contact analyses.

The Organizational Analysis view toggles between a Contacts list, and an Organization Map. Contacts previously associated with the opportunity automatically appear in both views. The contacts shown in the Contacts list appear in the Organization Map view.

The toggle control list is shown in Figure 3. You can click New in either the Contacts list view or the Organization Map to create contact records. Position the pointer on the “i” icon to display information on the view.

Figure 3. Organizational Analysis View, Contacts List and Organization Map Toggle

Regardless of which view you use to create or select contacts, analyze each contact based on the criteria taught in the TAS methodology training program. This criteria includes Buying Role, Your Status, Level of Influence, Adaptability to Change, and Coverage.

The Level of Influence that you assign to each contact determines the degree of shading that appears in the contact node in the Organization Map. Table 7 explains the contact node shading for each value in the Level of Influence field.

Table 7. Level of Influence Shading for Contacts

Value in Level of Influence Field	Shading on Organization Chart
Low	None
Political Structure (Medium)	Light gray
Inner Circle (High)	Dark Gray

You can also map the politics in the customer organization by identifying formal and informal lines of influence between contacts. Mapping informal lines of influence helps you identify contacts who may not be ranked highly (and are easier to access) but have significant influence on key decision makers.

To begin an organizational analysis

1. Navigate to the Opportunities screen, and then select an opportunity in the Opportunities list.

2. Click the Target Account Selling view tab.

3. From the Show drop-down list, choose Organizational Analysis.

   The Organization Map view appears.

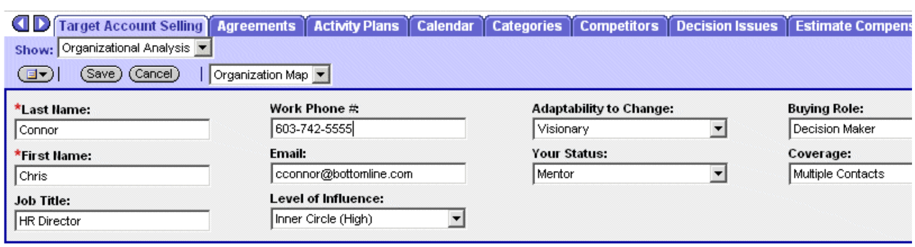
To add a new contact in the Organization Map

1. In the Organization Map view, click New.

2. In the Add Contacts dialog box, click New.

3. In the Contact form, complete the fields, and then click Save.

   The following figure shows the Organization Map contact form that includes assessment fields such as Adaptability to Change, Buying Role, and Coverage.



   When you toggle to the Organization Map, this information appears in the contact node box, illustrated on the following page.

To add a contact in the Contacts list

1. From the toggle list, choose Contacts.

2. In the Contacts list, click New.

3. In the Add Contacts dialog box, select the contact or contacts you want to add, and then click OK.

   In the Add Contacts dialog box, click New to create a new contact.

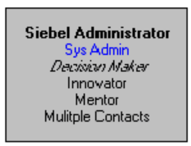
4. Complete the fields to analyze the contact.

To create the organization map

1 In the view drop-down list toggle, select Organization Map.

The organizational chart displays the nodes (boxes) containing information for each of the contacts you have analyzed and associated with the opportunity.

The following figure shows an example of a contact node with Level of Influence shading. The node includes information about the contact, such as the contact's title and other contact analysis information (Decision Maker, Mentor).



You can visually represent the formal hierarchy in the organization by creating the Organization Map of key customers in the deal.

2 Select the contact node and drag it beneath the contact node that shows the contact's manager.

When you drop the contact node on the manager's node, a line appears between the nodes, reflecting the reporting relationship.

3 Repeat this procedure for each contact until you have completed the organization chart.

NOTE: The reporting relationships are also stored in the Contacts list (toggle view). The Manager Last Name and Manager First Name fields in the contact record are automatically populated. To expose this information in the contacts list, click the menu button, and then select Columns Displayed.

To delete contacts on the Organization Map

- Select the contact node, right click the mouse, and choose Edit > Delete from the menu.

To draw lines of influence

1. In the Organization Map, press the CTRL key and simultaneously select the contact.
2. Drag and drop the selected contact node on other contacts to draw the lines of influence.

   The CTRL key must be depressed throughout this process for the informal line of influence to appear.

NOTE: This information is automatically updated in the Relationships view of the Contacts screen. You can indicate lines of influence in the Relationships view if you prefer.

To delete lines of influence on the Organization Map

- Select the line, right click with the mouse, and then choose Edit > Delete from the menu.

To print the organization map

1. From the Organization Map, right click your mouse, and then select Zoom from the menu to choose the Zoom level at which you want to print the chart.
2. From the Organization Map, right click your mouse again, and then choose Print from the menu.

   The Organization Map prints at the selected zoom level. Large charts print across multiple pages.

NOTE: The Organization Map does not print in the Initial Plan Report or Opportunity Plan Report. You must print it from the Organization Map view using the right-click menu.

Adding Customer Milestones

Milestones are formal steps in the customer's buying process. The Customer Milestones view helps sales professionals identify and track customer requirements that must be met as the sales cycle progresses. After the milestones are set, use the Our Activities list to target specific activities that need to be accomplished to meet each milestone. These activities might include product demonstrations, benchmarks, and other activities required to make the sale. Figure 4 shows the Customer Milestones list, and the activities associated with the selected milestone in the Our Activities list.

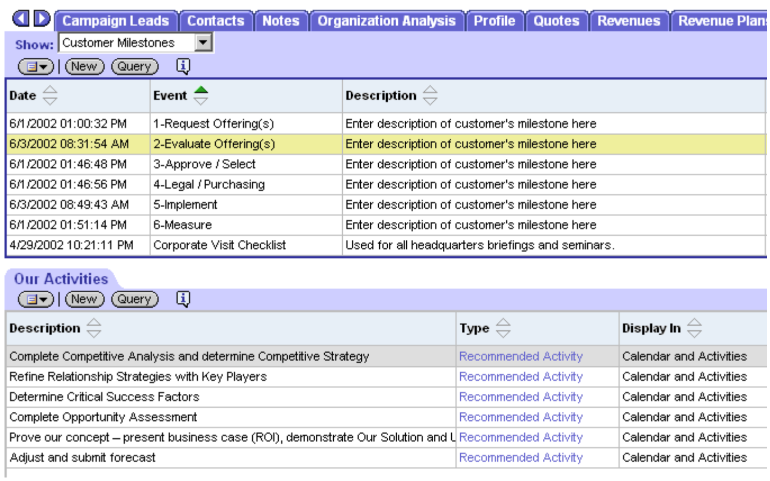


Figure 4. Customer Milestones View with Associated Activities

Milestones are similar to Activity Plan templates that are created with predefined activities. For example, the initial milestone, Request Offering, is associated with recommended activities to be performed by you and your sales team. These activities might include understanding the problem or opportunity, defining the customer's Compelling Event and confirming the budget, completing an opportunity assessment, and developing an organization map for the customer's business.

A sample of customer milestone types is included with the Siebel Sales application. Your administrator can change the milestones, based on your business needs. You and your sales team can create, edit and delete activities associated with the milestones that address the opportunity.

To add a milestone

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Target Account Selling view tab.
4. In the TAS form, from the Show drop-down list, select Customer Milestones.
5. In the Customer Milestones list, click New.

   A new record appears in the list, with the current date in the Date field.

6. Complete the necessary fields.
   a. In the Event field, select the type of event from the list, and then click Save.

      A set of suggested activities appears in the Our Activities list. You must save the type of event for the activities to appear.

   b. In the Description field, enter information about the event.
   c. In the Customer Responsibility field, click the select button, and then from the Contacts dialog box, choose the customer contact who is the key contact and owner of the milestone event.

Repeat Step 5 and Step 6 until you have entered all key milestone events.

NOTE: Review the recommended activities for each milestone before adding new milestones.

To add associated activities to each milestone

1. See "To add a milestone" to create the Milestone.
2. In the Our Activities list, click New, and then complete the necessary fields for the activity.
   a. In the Type field, choose the activity type from the list.

b In the Display In field, choose where you want the activity to appear.

Options are Activities Only, Calendar and Activities, and To Do and Activities.

NOTE: If you choose Calendar and Activity as the display method, you must enter a start date for the activity for it to appear in the calendar.

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c In the Resources text field, describe the resources required to support the activity.

d If the activity will be delegated, for example, from a manager to a member of the sales team, click the hyperlink in the Owner field, and query for the new owner in the Employees list.

The default owner is the User ID of the activity creator.

Developing Relationship Strategy

The Relationship Strategy view helps sales professionals to discuss the right decision criteria with the right people. Information captured in this view facilitates the development of a relationship strategy for each of the key players identified. The view makes it easy for sales teams to share their understanding of both the business and personal agendas of each contact, easing the execution of the desired relationship strategy.

To add decision criteria

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Target Account Selling view tab.
4. In the TAS form, from the Show drop-down list, select Relationship Strategy.
5. In the Relationship Strategy list, click New.

6 From the Add Contacts dialog box, select the contact or contacts you want to add, and then click OK.

> **NOTE:** All contacts added in the Organization Map automatically appear in the Contacts list, and all contacts added in the Contacts list appear in the Organization Map.

7 In the Relationship Strategy list, complete the Business Agenda, Personal Agenda and Relationship Strategy fields for each contact.

To add decision criteria

1. In the Relationship Strategy list, select a contact.
2. In the Decision Criteria Key Issues list, click New.
3. In the Add Issues form, click Go.
4. In the Add Issues dialog box, select the issue and click Add.
5. In the Decision Criteria list, complete the Rank and Comments fields for the issue.
6. Drill down on the hyperlink in the issue name field to view more information associated with the issue.

Viewing PRIME Activities

The PRIME Activities view helps sales professionals to develop the action steps required to execute the strategy to win this opportunity. The PRIME acronym underscores the initiatives that are used:

- Prove your value
- Retrieve missing information
- Insulate against competition
- Minimize your weaknesses
- Emphasize your strengths

These activities can be assigned with due dates to specific members of the sales team and automatically appear in individual calendars and activity lists. Use this view to keep the entire sales team on the same page and measure progress in implementing the sales strategy.

Activities created in the Our Activities list in the Milestones view also appear in the PRIME Activities list, providing a convenient method for tracking. (In the Customer Milestones list, you must select the milestone to see the associated activities.)

Using this view, you can create activities that are not specific to milestones, such as follow up actions associated with Assessments and the Organizational Analysis.

To add PRIME activities

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Target Account Selling view tab.
4. In the TAS form, from the Show drop-down list, select PRIME Activities.
5. In the PRIME Activities list, click New.
6. Complete the necessary fields for the new activity.

   You need to identify the actions and resources required to implement your strategy and select a member of your sales team who is responsible for the activity.

Adding Notes

The Notes view consolidates comments (for example, notes and directions) created by various members of the sales team. These can be marked for general viewing or can be kept private. This makes it easy to aggregate and track observations about the opportunity throughout the sales process.

To add a note

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Target Account Selling view tab.
4. In the TAS form, from the Show drop-down list, select Notes.
5. In the Notes list, click New.
6. In the Type field, select the type of note from the drop-down list, and then enter a description of the note.
7. From the drop-down list, choose whether the note should be public or private.

Generating Reports

You can automatically create reports to make it easier to review your TAS plans. These can be printed or emailed to share with your sales team. Available reports include the TAS Opportunity Plan and TAS Initial Plan reports. You can configure the Opportunity Plan report to print specific sections.

The TAS Opportunity Plan Report prints all the Assessments completed for Our Company and all competitors on the three most recent dates. The TAS Initial Plan Report prints all the Assessments completed for Our Company and all competitors on the one most recent date.

To create a report

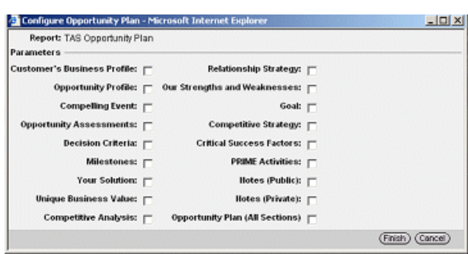
1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Target Account Selling view tab.
4. From the application-level menu, choose View > Reports.

   The Reports dialog box appears.

5. From the Select a Report drop-down list, select the report to display and then click Run.

   Options are Opportunity Plan and Initial Plan reports.

   - To print sections of the Opportunity Plan report, click the check boxes associated with the sections in the Configure Opportunity Plan dialog box, shown in the following figure, and then click Finish.

   You can save, print, or email the report if desired.

Strategic Selling 15

This chapter explains how sales professionals can use Miller Heiman's Strategic Selling methodology within the Siebel Sales application to close new business. The Strategic Selling module is a separately licensed product. Using the Strategic Selling module, sales professionals can enter sales objectives, assess buying influences, understand their competitive position, and create an action plan to execute the competitive strategy. This information is available in a report, called the Blue Sheet. For information on Strategic Selling administrative tasks, see *Applications Administration Guide, MidMarket Edition*.

Strategic Selling® Overview

The Strategic Selling software module in Siebel Sales provides full support for the Strategic Selling methodology from Miller Heiman. Sales professionals can reinforce and use the Strategic Selling sales process within the Siebel eBusiness Applications suite, using their sales methodology and their sales tools together to close new business. Siebel Strategic Selling software provides the following features:

- Support for the Strategic Selling methodology (a separately licensed service available through Miller Heiman, Inc.)
- Assessment of the opportunity compared to the ideal criteria
- Analysis of key contacts and development of a relationship strategy
- Tools to improve your position based on your sales objective
- Support in developing an action plan to execute your sales strategy
- Automatic generation of a Blue Sheet report

Business Scenario

A sales representative joins the sales team for a new opportunity. Before he makes any calls into the account, the sales representative plans to perform a Miller Heiman Strategic Selling analysis of the opportunity. The sales representative locates the opportunity in his opportunity list and then selects the Strategic Selling view tab.

In the Single Sales Objective view, the sales representative reviews the information typically shown at the top of the Strategic Selling Blue Sheet. He gauges his general feeling about the opportunity. He notes that two fields have been carried over from the Siebel account form—the dollar volume of business that he is currently doing with the account and the amount that he plans to do with the account over the next year or more. These two fields are read-only. The sales representative proceeds to assess his competitive position and determines the timing for his priorities. He selects the Strategic Selling Assessment template and evaluates the opportunity to determine how it compares against an ideal customer. Based on his evaluation, the opportunity is automatically scored.

The sales representative then navigates to the Buying Influences view. Contacts associated with the opportunity automatically are shown in the view. He adds new contacts and assesses his relationship strategy with each of them. Each contact can play a variety of roles in the evaluation, and each buyer can have a reason for participating in the evaluation. The personal win and business results tell the sales representative and his team the benefits for his contact, and the ratings show how well the sales representative has covered all aspects of the opportunity. The sales representative then enters evidence to support his ratings.

In the Position Summary view, the sales representative completes a description of his company’s strengths and weaknesses (red flags) in the deal. He also identifies information required to close this opportunity.

Now that he has set his Single Sales Objective and completed his customer and competitive analysis, the sales representative creates an action plan for his team to win this opportunity. He goes to the Possible Actions view and adds a list of possible actions generated during a collaborative session with his team. The actions the team will take are marked Best. These automatically appear in the Best Actions view where the sales representative assigns them to sales team members and marks the due date for each action. These activities automatically appear on the assignee's calendar, to-do list, or activities list, based on the choice in the Display In field for each activity. The sales representative can check this list at any time as the deal progresses to track the status of the activities.

After the sales representative has finished entering and updating his Strategic Selling information, he can generate a Blue Sheet report that he can print or email to share with his team.

Using Strategic Selling

Sales professionals can reinforce and use the Strategic Selling sales process within the Siebel eBusiness Applications suite, combining sales methodology and sales tools to more efficiently close new business.

Meeting the Single Sales Objective

Siebel Strategic Selling helps sales professionals meet their sales objectives for the account. By assessing and testing their position, sales professionals can make sure their sales teams evaluate the probability for meeting the Single Sales Objective, as taught in the Miller Heiman Strategic Selling process. The software module also helps sales professionals analyze whether or not they are working on the right sales objective, or an objective where closing the deal meets both the customer's needs and the sales professionals' long-term goal for the account. Sales professionals can evaluate the opportunity compared to an Ideal Customer profile, providing an understanding of their position and underscoring the best strategy to take.

To assess your position

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Strategic Selling view tab.

   The Strategic Selling Position form, Ideal Customer Assessment list and Ideal Customer Criteria list appear with the Opportunity form.

4. In the Position form, complete the fields to identify the competition for the opportunity and assess your position.

   The following table describes the fields in the Position form.

Field	Comments
Adequacy of Current Position	Select the value that best describes how you feel about your current position. Examples of values are Euphoria, Great, OK, Secure, Comfort, and Worry.
My Position vs. Competition	Select the value that describes your position compared to your key competitors. Examples of values include Only Alternative, Front Runner, Shared, and Zero.
Timing for Priorities	Select the value that describes the timing for your priorities. Examples are Urgent, Active, Work It In, and Later.

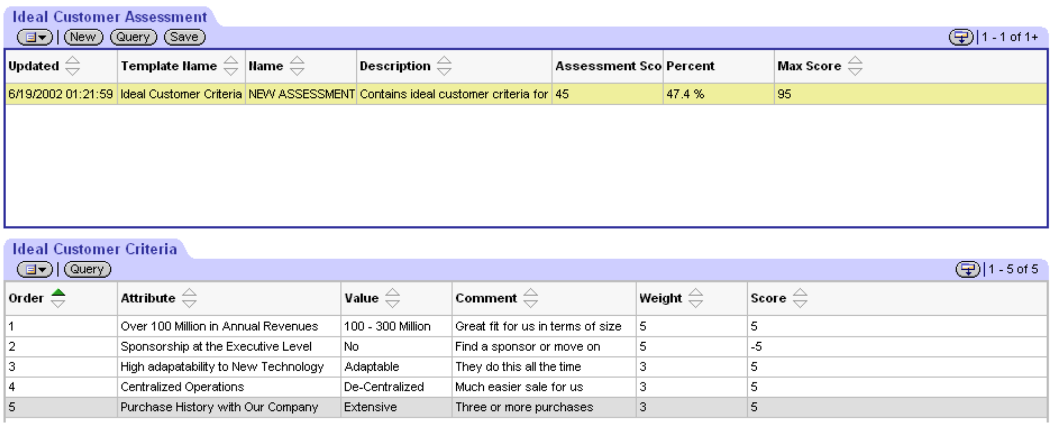
   Assessment criteria are taught by Miller Heiman instructors in the Strategic Selling methodology workshop.

5. In the Ideal Customer Assessment list, click New.
6. In the new record, click the select button in the Name field to choose the Ideal Customer Criteria template, and then click Save.

   An explicit Save is required for the assessment criteria to appear.

7 In the Ideal Customer Criteria list, query to select a value for each assessment criterion.

The following illustration shows an Ideal Customer Assessment record, and the Ideal Customer Criteria list shows the criteria associated with the assessment.



Click the select button in the Value field to view each value and its description. The opportunity assessment is automatically scored based on the selected values.

The Assessment Score and its percentage of the Max Score, defined in the Assessment template, appear in the Ideal Customer Assessment list.

Adding Buying Influences Information

The Buying Influences view helps sales teams identify the role each contact plays and each contact's reason for participating in the project. The personal win and business results recorded in this view help the sales professional to understand the outcome benefit for the contact. By understanding the business and personal agendas of their contacts, sales professionals can form effective relationships and consider where to dedicate resources.

To add buying influence information

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Strategic Selling view tab.
4. From the Show drop-down list, choose Buying Influences.
5. In the Buying Influences list, click New.
6. In the Add Contacts dialog box, select contacts you want to add, and then click OK.

   To enter new contacts, click New in the Add Contacts dialog box.

7. In the Buying Influences list, complete the fields for the contact.

   a Indicate the role of the contact by placing a check mark in each applicable field.

   Fields include Economic Buyer, User Buyer, Technical Buyer, and Coach.

   b Enter information in the Personal Win and Business Results fields for each contact.

   c Select a Rating and Mode for each contact.

   Examples of Rating are +2 Interested, and +4, Strongly Supportive. Examples of Mode are Growth, Trouble, and Overconfident.

   d Enter your Evidence to Support Rating in the text field.

Adding Possible Actions

In the Possible Actions view, the sales team can brainstorm feasible actions for advancing an opportunity and then create an action plan based on Best Actions.

To add possible actions

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Strategic Selling view tab.
4. From the Show drop-down list, choose Possible Actions.
5. In the Possible Actions list, click New.

   A new row appears in the Possible Actions list.
6. In the new record, select the check box in the Best field to mark this action as best.

   All actions flagged as Best appear in the Best Actions view.
7. In the What field, enter a description of the action.

Repeat Step 6 through Step 7 to enter all the best actions your sales team can accomplish.

Adding Best Actions

The Best Actions view presents the actions in the Possible Actions view that the sales team has selected as the best choices to advance the opportunities. This view helps keep the entire sales team on the same page by providing one location for action planning and logging status. You can assign best actions to people on your opportunity team and these actions appear in their activities list. It also helps teams monitor cumulative progress towards sales goals.

To add best actions

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.

3 Click the Strategic Selling view tab.

4 From the Show drop-down list, choose Best Actions.

The possible actions you previously selected as best automatically appear in the Best Actions list.

5 Click New in the Best Actions list, and complete the fields for the new record.

The following table describes the fields for a Best Action.

Field	Comments
What	Enter the description of the action in the text field. This description appears in the Activities list for the Opportunity. You can set the Display field to display the best action in your Calendar and Activities lists, your To-Do and Activities lists, or Activities Only.
Who	The default is the user that created the Best Action. You can assign the action to another employee or person on your sales team.
Start	Automatically populated. An action must have a start date to appear in the Calendar.
Due	Click the Calendar control and choose the completion date for the action.
Status	Indicate the status for an action by selecting it from the list of values.
Display	Indicate where you want the action to appear by selecting from the list of values. Options are Calendar and Activities, To-Do and Activities, and Activities Only. The default is Calendar and Activities.

Adding Position Summary Information

The Position Summary view helps sales professionals identify Red Flags and Strengths to use in the opportunity. With this information, you can identify and track information needed to improve your competitive position.

To add position summary information

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Strategic Selling view tab.
4. From the Show drop-down list, choose Position Summary.
5. In the Position Summary form, complete the Strengths and Red Flag fields.

   Strengths and Red Flags help you determine your strengths and weaknesses for closing this opportunity.
6. In the Information Needed form, click New.
7. In the new record, identify what information is needed, and designate a source for the information in the What and From Whom fields.

   NOTE: Records in the Information Needed list also appear in the Activities list for the opportunity. The Activity Type is Information Needed.

Creating a Blue Sheet Report

The Blue Sheet uncovers and communicates key information at a glance. It helps to focus your team's attention on essential business and contact information. You can print the Blue Sheet or email it to your manager and team in report format or as an HTML document.

To create a Blue Sheet report

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select the opportunity.
3. Click the Strategic Selling view tab.
4. From the application-level menu choose View > Reports.
5. In the Reports dialog box, select the Blue Sheet report, the language and locale.
6. Click Run Now.

   Click Schedule to run the report at a later date and time.

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Most Commonly Used Views

Table 8 lists view that are commonly associated with Siebel application screens.

Table 8. Common Siebel Application Views

View	Description
Activities	View and associate activities with a record.
Activity Plans	Associate activity plans with a record. An activity plan template is a set of activities directed toward a specific business goal or marketing technique.
Agreements	Associate agreements with the selected record.
Attachments	Attach files created in other programs to the selected record.
Calendar	Add appointments, meetings, and other relevant events to the selected record by entering them in the Calendar view tab.
Categories	Associate categories with accounts, opportunities, products, and contacts.
Change Requests	Create any change requests associated with the selected record.
Contacts	Associate contacts with the selected record.
Charts	View charts associated with the selected record.
Explorer	View information in a hierarchical format, similar to that of Windows Explorer.
Literature	View brochures, white papers, and other items associated with the selected record.
Messages	Associate phone messages with the selected record.
More Info	View detailed information about the selected record.

Table 8. Common Siebel Application Views

View	Description
Notes	Associate text notes with the selected record. Notes can be shared among others, or they can be designated private.
Opportunities	Associate new or existing opportunities with the selected record.
Orders	Add orders to the selected record.
Organizations	View organizations related to the selected record.
Products	Associate products with the selected record.
Profile	View a collection of important information about the selected record.
Quotes	Add quotes to the selected record.

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