Siebel

Correspondence, Proposals, and Presentations Guide

October 2026

Siebel
Correspondence, Proposals, and Presentations Guide

October 2026

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Get Help

Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *https://docs.oracle.com/*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

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1 What's New in This Release

What’s New in Oracle's Siebel Correspondence, Proposals and Presentations Guide, Siebel CRM 20.4 Update

The following information lists the changes described in this version of the documentation to support this release of the software.

Siebel Correspondence, Proposals and Presentations Guide, Siebel CRM 20.4 Update.

Topic	Description
Creating and Updating the SIEBEL.HTML File	Modified topic. Updated step 5.

What’s New in Oracle's Siebel Correspondence, Proposals and Presentations Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

What’s New in Oracle’s Siebel Correspondence, Proposals and Presentations Guide, Siebel CRM 19.10 Update

The following information lists the changes described in this version of the documentation to support this release of the software.

Updates in Siebel Correspondence, Proposals and Presentations Guide, Siebel CRM 19.10 Update.

Topic	Description
Configuring Application Recycle Period	Modified the topic. Updated the value for the parameter MSWordLiveCount to 1

What’s New in Oracle's Siebel Correspondence, Proposals and Presentations Guide, Siebel CRM 19.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Document Server

Document Server

This chapter includes information about setting up the Document Server. It includes the following topics:

- *About the Document Server*
- *About Obtaining Required Hardware for the Document Server*
- *Process of Setting Up the Document Server*
- *Installing the Siebel Server for the Document Server*
- *Installing Microsoft Office on the Document Server*
- *Enabling the Component Group for the Document Server*
- *Setting MaxTasks Parameters for the Document Server*
- *About Synchronizing Components for the Document Server*
- *Configuring the Document Server*
- *About Accessing the Service for the Siebel Server*

About the Document Server

The Document Server is required for Oracle's Siebel Correspondence, Siebel Presentations, and Siebel Proposals. The Document Server is used to generate Microsoft Word and Microsoft PowerPoint documents.

About Running Document Server Functionality on Siebel Mobile Web Clients

This chapter focuses on installing and setting up the communal Document Servers that Siebel Web Clients use. However, the functionality for the Siebel Document Server is also available for the Siebel Mobile Web Client so that field sales representatives can generate proposals, presentations, and correspondences while traveling.

For the Siebel Mobile Web Client, Microsoft Office be installed locally on the mobile computer to act as the Document Server.

About Obtaining Required Hardware for the Document Server

The Document Server is supported only on Windows operating systems because Microsoft Office runs only on the Windows operating system.

Note: Platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

To maintain stability and performance, the Document Server must run on a dedicated host computer. The Siebel Server on this computer must host one instance of the Siebel eDocuments component group. No other components can be running other than required system components.

The Document Server can run successfully on a computer that meets the minimum hardware requirements for a Siebel installation. For example, you can use a two-processor computer.

To support more users, you can run additional instances of the Siebel eDocuments component group on additional dedicated host computers.

Process of Setting Up the Document Server

To set up the Document Server to prepare to use Correspondence, Presentations, or Proposals, perform the following tasks:

1. *Installing the Siebel Server for the Document Server*
2. *Installing Microsoft Office on the Document Server*
3. *Enabling the Component Group for the Document Server*
4. *Setting MaxTasks Parameters for the Document Server*

Installing the Siebel Server for the Document Server

Install the Siebel Server on the dedicated host computer of the Document Server. For general information about installing the Siebel Server, see *Siebel Installation Guide* .

During installation, you can enable component groups. Enable only the Siebel eDocuments (alias eDocuments) component group, the System Management (alias System) component group, and the Auxiliary System Management (alias SystemAux) component group. Do not enable any other component groups. Make sure that Siebel eDocuments component group is not enabled on your main Siebel Server.

You can also enable the Siebel eDocuments component group after installation is complete. For more information, see *Enabling the Component Group for the Document Server*.

Note: When the Siebel Server is restarted, the Document Server must also be restarted *after* the Siebel Server is brought up.

Make sure that you use the same SRF file on your Document Server as you use on your other Siebel Server. If you update one SRF file, remember to update the SRF file on all your Siebel Server computers, including the Document Server.

When your main Siebel Server runs on a UNIX operating system, use the following approaches to set up the Document Server (Windows operating system):

- Install third-party mounting software, such as Samba, to enable the Document Server (Windows operating system) to access the Siebel File System on the UNIX operating system.

- Stop the File System Manager Server component on the Document Server (Windows operating system), and set it to Manual Start.

Note: The Siebel File System Manager and the physical file system must be on the same operating system if you do not use a cross-platform mounting tool.

This task is a step in *Process of Setting Up the Document Server*.

Setting Up the Document Server in a Heterogeneous Environment Using Mounting Software

Complete the following procedure to set up the Document Server in a heterogeneous environment using third-party mounting software.

To set up the Document Server in a heterogeneous environment using third-party mounting software

1. Install third-party software, such as Samba, that enables the Windows computer to access the Siebel File System on the UNIX computer.
2. Make sure that the Siebel File System enterprise parameter on the Siebel Server on the Windows computer refers to the Windows share for the Siebel File System on the UNIX computer.
3. Make sure that the Siebel eDocuments component group is disabled for the Siebel Server on the UNIX computer.
4. Before you install the Siebel Server (the Document Server) on the Windows computer, make sure that the Siebel Gateway Name Server and the Siebel Server are running on the UNIX computer.
5. During installation of the Siebel Server on the Windows computer, enable only the component groups for Siebel eDocuments (alias eDocuments), System Management (alias System), and Auxiliary System Management (alias SystemAux).

Setting Up the Document Server in a Heterogeneous Environment Without Mounting Software

Complete the following procedure to set up the Document Server in a heterogeneous environment without third-party mounting software.

To set up the Document Server in a heterogeneous environment without third-party mounting software

1. Make sure that the Siebel File System enterprise parameter is set to the full path of the Siebel File System on the UNIX computer.
2. Make sure that the Siebel eDocuments component group is disabled for the Siebel Server on the UNIX computer.
3. Before you install the Siebel Server (the Document Server) on the Windows computer, make sure that the Siebel Gateway Name Server and the Siebel Server are running on the UNIX computer.
4. During installation of the Siebel Server on the Windows computer, enable only the component groups for Siebel eDocuments (alias eDocuments), System Management (alias System), and Auxiliary System Management (alias SystemAux).

5. On the Siebel Server (the Document Server) on the Windows computer, complete the following steps:
   a. Shut down the File System Manager Server (alias FSMSrvr) component, and set it to Manual Start in one of the following ways:
      - Use the following srvrmgr command:

        ```
        manual start {component | comp} component name [for [app] server server name]
        ```

      - In the Servers view of the Administration - Server Configuration screen, select the Windows Siebel Server that runs the Document Server in the Siebel Servers list, select the Filesystem Manager component in the Components list, and click Manual Start.

     > **Note:** To re-enable components, use the following srvrmgr command: auto start component. For information about re-enabling components, see *Siebel System Administration Guide* .

   b. In the Enterprise component definition, for the Document Server component, set the Siebel File System component parameter to *FSM*
   c. Synchronize all components.
6. Restart the Siebel Servers on the UNIX computer and on the Windows computer.

Installing Microsoft Office on the Document Server

You must install Microsoft Office on the dedicated host computer of the Document Server.

> **Note:** Platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

This task is a step in *Process of Setting Up the Document Server*.

To install Microsoft Office on the Document Server

1. Log in to the server computer using the same user account that the Siebel Server NT service uses.

   This user account must belong to the Administrators group.

   > **Note:** The installation must use the same account that the NT Service uses. The installer configures COM security settings so that the installing user account has the correct permissions to access and launch the application. If the install uses an account other than the Siebel Server NT service account, errors can occur when the Document Server tries to launch the application.

2. Install Microsoft Office using a typical or complete installation.

   Verify that your version of Microsoft Office installs the Web Authoring Tools (HTML) component with the typical installation. If it does not, use the custom installation option and install all of the typical components and the Web Authoring Tools (HTML) component.

   > **Note:** Do not perform a custom installation, and attempt to select only the Microsoft Office features that the Document Server uses. These features are not available, and if you attempt to select them, the Document Server does not function properly.

3. Start the applications that the Document Server uses.

   Starting the applications forces the applications to register themselves.
4. If you use Siebel Proposals, make sure that the following Microsoft Word option is not selected: Confirm conversion at open.

   To find this option, navigate to Tools, Options, and then General.
5. Close the applications.

Enabling the Component Group for the Document Server

If you did not do so during installation, you must enable the Siebel eDocuments component group. This group contains the DocServer component that generates Correspondence, Presentations, and Proposals. For more information about enabling this component group, see *Siebel System Administration Guide* .

This task is a step in *Process of Setting Up the Document Server*.

Setting MaxTasks Parameters for the Document Server

Due to Siebel design limitations, third-party Microsoft Office applications run in a single-threaded environment. Thus, the Document Server is capable of processing only a single document at a time on the server. To increase the number of documents printed at any one time, it is recommended you increase the number of servers.

Set the following Siebel Application Object Manager parameters:

- **MaxTasks.** Set this parameter to 1. If this parameter is greater than 1, an error message is sent to the log file as an alert. Processing of the request continues, but results are unpredictable when two requests arrive at the same time.
- **Honor MaxTasks.** Set this parameter to TRUE. This parameter affects the queuing process and the performance of the Document Server.
  - For a value of TRUE, all requests to the Document Servers queue on the SRM_REQUEST table; requests are not assigned to a Document Server until one is available to take the request. For information about setting parameters, see *Siebel System Administration Guide* .
  - For a value of FALSE, requests are queued on the internal queue of the DocServer component. If the Document Server stops processing, all queued processes on that server are lost.

This task is a step in *Process of Setting Up the Document Server*.

About Synchronizing Components for the Document Server

Synchronizing components for the Document Server is not specific to the Document Server, but is a required post-installation step for the server infrastructure. For general information about synchronizing components, see *Siebel System Administration Guide* .

Configuring the Document Server

To configure the Document Server, perform the following optional tasks:

- *Enabling HTML Generation for Correspondence*
- *Configuring Application Recycle Period*
- *Routing Requests to One Document Server*
- *Enabling Additional Logging*

Enabling HTML Generation for Correspondence

By default, correspondence is saved only in document format, not in HTML format. In the My Correspondence Requests view, the View HTML command is unavailable, and the user cannot view the correspondence in HTML format.

The DocumentServerViewHTML server parameter specifies if the Document Server generates HTML versions of documents. The default value is FALSE. By default, the Document Server generates documents only in their native format, and not in HTML. To enable the user to display correspondence in HTML format, you must edit the DocumentServerViewHTML parameter to the value TRUE instead of FALSE. Any documents generated after you enable the parameter are saved in both formats.

When you generate an HTML document, a copy of the generated document is created in HTML and stored in the Siebel File System. This process can affect performance, and it increases the storage space required in the Siebel File System. The clarity of the HTML document depends on the ability of your Microsoft Office application to translate its native format into HTML.

To enable HTML generation for correspondence

1. Start the Server Manager.
2. Enter the following command:

```
srvrmgr> change param DocumentServerViewHTML=True for comp DocServer
```

> **Note:** You can also change parameters in the Administration - Server Configuration screen. For more information, see *Siebel System Administration Guide* .

Configuring Application Recycle Period

You use the MSWordLiveCount parameter to control how often the Microsoft Office applications are restarted.

You can set each parameter to a positive integer that specifies the number of documents to be processed before the corresponding Microsoft Office application is shut down and restarted. A value of 0 (the default) indicates that the applications are not shut down. If you set the parameter value to any integer other than 0, and the Document Server fails to launch, the corresponding application is shut down and then restarted again.

To configure the application recycle period

1. Start the Server Manager.
2. To change the application recycling period for Microsoft Word, which is used for correspondence and proposals, enter the following command:

   ```
   srvrmgr> change param MSWordLiveCount=1 for comp DocServer
   ```

3. To change the application recycling period for Microsoft PowerPoint, which is used for presentations, enter the following command:

   ```
   srvrmgr> change param MSPPLiveCount=1 for comp DocServer
   ```

Routing Requests to One Document Server

If you run multiple Document Servers within the same enterprise, then the server infrastructure routes document requests to different Document Servers to achieve load balancing.

However, you can specify that all requests are routed to one Document Server. For example, you can specify one Document Server to help diagnose a server problem.

To route all requests to one Document Server

1. Start the Server Manager.
2. Enter the following command:

   ```
   srvrmgr> change param DocumentServerName=DocSrvr1
   ```

Enabling Additional Logging

You can enable additional logging for debugging purposes.

Event logging writes events to the log file using the log level for each event type. The number you specify indicates the filtering level for logging. The default value is 3. This value means that events with a level of 1, 2, or 3 are logged, while events with a level of 4 or 5 are suppressed. Setting the filtering level to 5 means that all events are logged. For more information about event logging, see *Siebel System Monitoring and Diagnostics Guide* .

To enable additional logging

1. Start the Server Manager.
2. Enter the following command for each event type for which you want to enable additional logging:

   ```
   srvrmgr> change evtloglvl event_alias_name=level for component Docserver
   ```

   where:

   - event_alias_name is one of the following event types:
     - **eDocDocServerEvent.** The Document Server business service is the high-level entry point for document generation. This business service passes document generation requests to the code that handles correspondence, proposals, or presentations. Set the logging to eDocDocServerEvent to provide high-level information about the incoming document generation request.
     - **eDocDocEngineEvent.** Because a proposal can have many components, the proposal generation code can be called many times. The Document Engine component calls the proposal generation code as often as necessary to generate each of these components, and then merges them together. Set the logging to eDocDocEngineEvent to trace events related to calling the proposal generation code and to collating the final proposal document.
     - **eDocCorrespEvent.** Correspondence generation is the process of performing the mail merge from the Siebel CRM application into the predefined Microsoft Word document. Set the logging to eDocCorrespEvent to trace the mail merge process between Siebel CRM and Microsoft Word.
     - **eDocProposalEvent.** Proposal generation is the process of merging fields from the Siebel CRM application into the predefined Microsoft Word document. Set the logging to eDocProposalEvent to trace the merge process between Siebel CRM and Microsoft Word.
     - **eDocPresentationEvent.** Presentation generation is the process of merging fields from the Siebel CRM application into the predefined Microsoft PowerPoint presentation. Set the logging to eDocPresentationEvent to trace the merge process between Siebel CRM and Microsoft PowerPoint.
   - level is a number that indicates the log level for the event type.

About Accessing the Service for the Siebel Server

The Document Server is a component of the Siebel Server. This component, if enabled, is run as a child process of the service for the Siebel Server. When you run the service for the Siebel Server, use a Microsoft Windows user ID such as SADMIN.

Do not use the LocalSystem user ID to run this service for the following reasons:

- This user ID grants unnecessary privileges to the Siebel Server, resulting in security issues.
- Users cannot proceed past the initial prompts when they access Microsoft Word for the first time because they cannot access Microsoft Windows with the LocalSystem user ID.

3 Correspondence

Correspondence

This chapter includes information about administering and using Siebel Correspondence. It includes the following topics:

- *About Siebel Correspondence*
- *Scenario for Managing Correspondence*
- *Process of Setting Up and Using Correspondence*
- *Creating and Updating the SIEBEL.HTML File*
- *Creating Correspondence Templates in Microsoft Word*
- *(Optional) Adding Insertion Templates into Correspondence Templates*
- *Creating Records for Correspondence Templates in the Siebel Application*
- *Configuring Additional Merge Fields For Correspondence Templates*
- *Generating Correspondence*

About Siebel Correspondence

Siebel Correspondence enables employees and partners to generate correspondence from any location with access to the Web. It also makes it easy for them to direct correspondence to fulfillment centers that print and mail it. Consequently, they can produce and send correspondence even if they are on the road and cannot access a printer. For information about the Documentation Server and other software that is required for Siebel Correspondence, see *Document Server*

For example, if sales representatives want to do mass mailings to customers in cities where they are giving presentations, Siebel Correspondence enables them to log in from any location where they can access the Web. Then they can create personalized form letters to invite customers in a specific city to a specific presentation, and direct these letters to a fulfillment center for printing and mailing.

First, an administrator creates templates (usually form letters and labels) that employees and partners can use for their everyday correspondence. Then, employees and partners can automatically generate correspondence using this template and on data from the Contact business component.

About Correspondence Templates

You create and edit Siebel correspondence templates in Microsoft Word (DOC file format). Correspondence templates contain fixed text and one or more merge fields. The merge fields are placeholders that are populated with variable information from your Siebel database, such as a Contact's name and address, when users generate a correspondence for recipients.

Users can create their own personal correspondence templates, and administrators can create correspondence templates for users.

About Correspondence with Multiple Languages and Locales

The fixed text of each correspondence template is written using specific locale conventions and language. To support Global Deployment, the author of the correspondence template can explicitly indicate the locale and language using the Locale and Language fields in the correspondence template record. The Document Server then uses these settings to substitute correctly localized data into the merge fields of the correspondence template. The following types of fields are affected:

- MLOV fields
- Global data fields
- Locale-sensitive fields, such as dates and currencies

Terms for Siebel Correspondence

The following table includes definitions of terms in this chapter.

Term	Definition
correspondence template	This template is a Microsoft Word file (DOC or HTM). It usually contains one or more merge fields. It must not contain code (including field codes such as ASK) or macros. Typically, this file contains a form letter in which the address and salutation are merge fields that are automatically populated for multiple recipients.
label template	The label template is a correspondence template specifically for a mailing label. You create label templates in much the same way as other correspondence templates, but they are generated using the Generate Label command instead of the Generate Correspondence command.
insertion template	This template is a Word, text, or HTML file. It cannot contain any merge fields.
personal correspondence template	This template is a correspondence template that users create for their own use. Other cannot use it, although the administrator can view, edit, and delete it.
correspondence template record	This record in the Siebel database contains the correspondence template. (The correspondence template is stored in the Siebel File System.) These records appear in the Correspondence Templates and the Personal Templates views.
correspondence record	This record in the Siebel database contains the generated correspondence. A correspondence record must be associated with a correspondence template record. In addition, it can be associated with a label template record.
merge field	Merge fields are placeholders in the correspondence template that are populated with information from records in the Siebel database, such as a contact's last name. (These fields are also called mail merge fields.)
merge data	Merge data from the Siebel database is copied into the merge fields when correspondence is generated.

Term	Definition
SIEBEL.HTML file	Lists the database columns used as merge fields in the most recently generated correspondence. (The file is updated each time correspondence is generated.) When you create correspondence templates in Microsoft Word, you use the SIEBEL.HTML file as the data source file.

Scenario for Managing Correspondence

This topic gives one example of how an administrator and sales representatives might manage correspondence. You might manage correspondence differently, depending on your business model.

A company installs the Documentation Server and wants to make Siebel Correspondence available to its sales representatives so that they can send literature with personalized cover letters to customers who request product information.

The administrator sets up the cover letter (correspondence) template and mailing label template that the sales representatives use.

When customers request product literature, the sale representatives generate personalized cover letters and mailing labels and specify the literature to include in the mailing. The customer names and addresses are taken from the Contacts list in the Siebel database.

The sales representatives review and sometimes modify the cover letter before submitting the correspondence to a fulfillment center where it is printed and mailed. They can save the document to save their cover letter changes to the Siebel File System.

Process of Setting Up and Using Correspondence

To set up and use correspondence, perform the following tasks:

1. *Creating and Updating the SIEBEL.HTML File*
2. *Creating Correspondence Templates in Microsoft Word*
3. *(Optional) Adding Insertion Templates into Correspondence Templates*
4. *Creating Records for Correspondence Templates in the Siebel Application*
5. *Configuring Additional Merge Fields For Correspondence Templates*
6. *Generating Correspondence*

Creating and Updating the SIEBEL.HTML File

The SIEBEL.HTML file is the data interface between the Siebel application and Microsoft Word. During the document generation process, the Document Server exports merge data into the SIEBEL.HTML file. Microsoft Word then reads

this file and inserts the data into the merge fields in the correspondence template. The column headers represent the defined merge fields. The cells contain the merge field values for the most recent correspondence. There is one record for each recipient.

Administrators can augment the set of available merge fields by using Siebel Tools. For information, see *Configuring Additional Merge Fields For Correspondence Templates*.

The SIEBEL.HTML file is not installed in the preconfigured Siebel application. It is created in the `\TEMP` directory the first time correspondence is generated.

The administrator can create or update the SIEBEL.HTML file at the following times:

- Before correspondence templates are created for the first time.
- After additional merge fields are configured. For more information, see *Configuring Additional Merge Fields For Correspondence Templates*.

End users can create a local SIEBEL.HTML file if they use disconnected Siebel Mobile Web Clients and want to create personal correspondence templates on their local computers.

This task is a step in *Process of Setting Up and Using Correspondence*.

To initially create or update the SIEBEL.HTML file by generating a blank correspondence template

1. In Microsoft Word, create and save a blank document.
2. Navigate to the Correspondence screen, then the Personal Templates view.
3. In the Templates list, create a new record, and in the Template field, specify the blank correspondence template that you created.
4. Navigate to the My Correspondence Requests view.
5. In the Correspondence list, create a new record.

   For example, if you are using fields from the Service Request Recipient business component, navigate to the Service Request screen and press Ctrl+L. You can see the custom fields in the Siebel.HTML file.
6. In the Template field, select the template record that you created.
7. Click Generate.

   The SIEBEL.HTML file that is created in the `\TEMP` directory contains all the database columns that are for use as merge fields.

Creating Correspondence Templates in Microsoft Word

To create a correspondence template in Microsoft Word, you can use the following documents:

- An existing Microsoft document, for example a company form letter. Make sure that the document does not contain any merge fields not defined in SIEBEL.HTML, any code, or any macros.
- A new, blank Microsoft Word document.

You can add merge fields (defined in the SIEBEL.HTML file) to Microsoft Word documents.

> **Note:** Platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

This task is a step in *Process of Setting Up and Using Correspondence*.

To create a template and add merge fields in Microsoft Word

1. Copy the current version of the SIEBEL.HTML file to your local hard drive, for example, to the `My Documents` directory.
2. In Microsoft Word, create a new document or open the document that you want to use as the starting point for the correspondence template.
3. Add and edit the text in the document as required.
4. Use the mail merge feature in Microsoft Word to add merge fields to the document.

   The SIEBEL.HTML file is the data source. For more information about using the mail merge feature, see the online help for Microsoft Word.

   > **CAUTION:** After you add the merge fields, you must restore the document to normal node. If you do not restore the document to normal mode, the Document Server can stop responding when correspondence is generated.

5. Save the file with a DOC file extension, and close it.

(Optional) Adding Insertion Templates into Correspondence Templates

The Siebel Correspondence file insertion feature enables you to insert one or more files (insertion templates) into a correspondence template. These insertion templates can be in Word, text, or HTML files.

You can add insertion templates containing generic content into one or many correspondence templates. For example, you can create a company description in a separate insertion template and then include it in several correspondence templates. If the description changes, you can modify only the insertion template instead of every correspondence template.

You can add as many insertion templates into a correspondence template as necessary. The file name for each insertion template must be unique, and you must insert each insertion template into the correspondence template independently. You cannot nest insertion templates. For example, you can insert File1.doc, File2.doc, and File3.doc into a FollowUp.doc template. But, you cannot insert File1.doc into File2.doc, and then insert File2.doc into FollowUp.doc.

This task is a step in *Process of Setting Up and Using Correspondence*.

To add an insertion template into a correspondence template

1. If it does not already exist, create the insertion template using Microsoft Word.

   Make sure that the insertion template does not contain merge fields, code, or macros.
2. Open the correspondence template to which to add the insertion template.
3. Insert a separate line with the following command at the location where the insertion template is to appear:

   ```
   [[File Name]]
   ```

   Do not include the file extension. For example, if insertion template is File1.doc, enter **[[File1]]**.

4. Save the file with a DOC file extension, and close it.

Creating Records for Correspondence Templates in the Siebel Application

To make the correspondence templates available to the Siebel application, you must add them to the Siebel File System by creating a correspondence template record. You can add correspondence template records in the following views:

- Correspondence Templates view of the Administration - Document screen. The administrator who creates correspondence templates for multiple employees uses this view.
- Personal Templates view of the Correspondence screen. Employees who create correspondence personal-use templates use this view.

Tip: Create correspondence template records for the insertion templates and for the correspondence templates.

Note: Always perform system administration tasks, such as administration of correspondence templates, against the server database. Although you can perform these tasks against your local database and synchronize, doing so can cause errors, including data conflicts. In addition, performance problems can result from a large local database and from routing large numbers of transactions.

This task is a step in *Process of Setting Up and Using Correspondence*.

To create a record for the correspondence template

1. Navigate to one of the following views:
    - Correspondence Templates view of the Administration - Document screen
    - Personal Templates view of the Correspondence screen
2. In the Templates list, create a new record, and complete the necessary fields.

    Some fields are described in the following table.

Field	Comments
Template Name	Select the name of a correspondence template, label template, or insertion template.
Active	Select the check box to indicate the correspondence template is available for use. **Note:** It is recommended that you make the template inactive before modifying it to prevent other users from attempting to use it while you are modifying it. After you finish modifying the template, make the template active again.

Field	Comments
Personal	Select the check box to indicate that the correspondence template is a personal correspondence template that the creator can use. This field appears in the Administration - Document screen but not in the Correspondence screen.
Language	Select the language the Document Server uses to render merge fields that are based on MLOV and Global Data Business Component fields.
Locale	Select the locale the Document Server uses to format merged data that is based on locale-sensitive business component fields, such as phone numbers. If you do not select a locale, the application locale is used.
Request	Select the check box to indicate the document is retrieved during the next synchronization session. This field enables users to request templates from the server. This field applies to only Siebel Remote users.
Update File (or Update)	Select the check box to indicate the template for mobile users is updated automatically each time the original file is changed. This field appears in the Administration - Document screen but not in the Correspondence screen.

Configuring Additional Merge Fields For Correspondence Templates

The exported data is taken from the following business components:

- Service Request Recipient business component if the correspondence is created from a view that is based on service requests
- Recipients business component if the correspondence is created from the Correspondence list view or from a view that is not based on service requests (such as the Opportunities screen)

New fields in the Recipients business component are restricted to those fields that are based on columns in the S_CONTACT table or those fields that are obtained through join relationships. You can add joins for tables that have a master-detail relationship with S_CONTACT, where S_CONTACT is the detail table. You must add the join to the Recipients business component.

New fields in the Service Request Recipient business component are restricted to those fields that are based on columns in the S_CONTACT table, the S_SRV_REQ table, or columns available through joins to these tables.

The following table summarizes the contents of the two business components and the contexts in which they are used. For more information about adding fields, see *Developing and Deploying Siebel Business Applications* and *Configuring Siebel Business Applications* .

Source Business Component	Source Tables	Used In
Recipients	• S_CONTACT • Joins with tables that have a master-detail relationship with S_CONTACT as the detail table).	Correspondence created: • Directly in the Correspondence List view. • From any view that is not based on service requests.
Service Request Recipient	• S_CONTACT • S_SRV_REQ • Joins with tables that have a master-detail relationship with S_CONTACT or S_SRV_REQ as the detail table.	Correspondence created from views that are based on service requests.

This task is a step in *Process of Setting Up and Using Correspondence*.

To configure an additional merge field for correspondence templates

1. In Siebel Tools, add the new field to the Recipients business component or the Service Request Recipient business component.

   > **CAUTION:** Make sure that the database column name for the field does not exceed 38 characters. Microsoft Word does not display merge fields beyond this limit.

2. Add the name of the new field to the Export Field # user property of the business component, where # is an integer.

   If necessary, you can create additional user properties by incrementing the integer.
3. Update the SIEBEL.HTML file before creating a correspondence template containing the new field.

   For more information, see *Creating and Updating the SIEBEL.HTML File*.

   > **Note:** The SIEBEL.HTML file can have up to 63 merge fields; Microsoft Word does not display fields beyond this limit.

Generating Correspondence

End users generate correspondence using the administrator-defined correspondence templates or the personal correspondence templates that they create themselves. For information about printing correspondence, see *Fulfillment Centers*.

Using Microsoft Word, they can edit the template for a selected correspondence record, and they can edit the generated correspondence document. They can save the edits to the correspondence document to the Siebel File System by saving the merged Microsoft Word document.

You can attach literature to the correspondence. For general information about literature, see *Siebel Applications Administration Guide* .

This task is a step in *Process of Setting Up and Using Correspondence*.

To generate correspondence

1. Navigate to the Correspondence screen, then the My Correspondence Requests view.

   Note: You can navigate to this screen from anywhere in the Siebel application by choosing File, then Send Letter from the application-level menu.

2. In the Correspondence list, create a new record, and complete the necessary fields.
   Some fields are described in the following table.

Field	Comments
Status	Displays the status of the correspondence submission to a fulfillment center. Values include In Progress, Submitted, and Completed. For more information, see *Fulfillment Centers*.
Template	Select the name of the template that you want to use for the correspondence.
Fulfillment Center	Select a fulfillment center that can produce and distribute the document and enclosures for you. For more information, see *Fulfillment Centers*.
Generated Document	Displays the name of the generated document. After the correspondence is generated, you can drill down on this field to preview the document merged with the name and address of the selected recipient in the Recipients list.
Opportunity	Select the name of the opportunity associated with the correspondence. You can drill down on this field to open the Opportunity detail form.
Label Template	Select the name of the label template.
Label Status	Displays the status for the label. Values include In Progress, Generating, Completed, and Failed.
Generated Label	Displays the name of the generated label. You can drill down on this field to preview the label merged with the name and address of the selected recipient in the Recipients list.

3. In the Recipients list, add records for the contacts or employees to receive the correspondence.
   Specifying large numbers of recipients affects performance and the time required to generate the correspondence.
   If you create a new record in the Add Recipients dialog box, the record is added to the Contacts list.

4. If you want to include literature in the correspondence, add records to the Enclosures list.

   Literature must be the Sales Tool* type and cannot be marked as internal.

   > **Note:** If you are working in a Siebel Mobile Web Client environment (remote), the literature files must be available in your local environment. If the Local check box is selected, you can work with the file in a remote environment.

5. If you want to edit the correspondence template, and the changes apply to all recipients but only to this correspondence record, edit the file in the Modified Template field.

   This file (like the correspondence template) is stored in the Siebel File System.
6. Click Generate.
7. For a Siebel Web Client (network connection), complete the following steps:

   a. Click Update to refresh the record (because the Document Status field does not automatically update) to see the current status of the correspondence.

      Some status values are described in the following table.

Status	Description
In Queue	The request is sent to an available Document Server.
Generating	The Document Server is creating the Microsoft Word merge document.
Completed	The document is available, and you can access it from the Generated Document field.
Failed	The Document Server encountered errors. Check the Document Error and Label Error fields for error messages.

   b. Drill down on the Merged hyperlink in the Generated Document field.

      If Microsoft Word is not installed locally and you do not have enabled HTML generation, then click Menu (the cogwheel icon) and select View (HTML) to display a document in the Web browser.

      > **Note:** If you are using the Siebel Mobile Web Client, the generated correspondence opens automatically.

8. (Optional) Complete the following additional steps:

   - Edit individual pages of the generated correspondence, and save the changes to the Siebel File System before printing, batch printing, or submitting to a fulfillment center.

     For information about fulfillment centers, see *About Fulfillment Centers*. For information about batch printing, see *About Batch Printing*.
   - To generate labels for the correspondence, complete the Label Template field, click Menu (the cogwheel icon), and select Generate Label.

4 Proposals

Proposals

This chapter includes information about administering and using Siebel Proposals. It includes the following topics:

- *About Siebel Proposals*
- *System Requirements for Siebel Proposals*
- *Process of Creating Proposal Templates*
- *Creating Proposal Template Documents in Microsoft Word*
- *Creating Records for Proposal Templates*
- *Defining Proposal Template Sections*
- *Adding Components to Proposal Template Sections*
- *Using Conditions in Proposal Templates*
- *Defining Proposal Field Mappings*
- *Associating Field Mappings with Proposal Templates*
- *Creating the Proposal Library*
- *Enabling Users to Display Proposals in HTML Format*
- *About Generating Proposals*
- *Scenario for Generating Proposals*
- *Process of Generating Proposals (End User)*
- *Creating Proposals (End User)*
- *Generating a Proposal Draft (End User)*
- *Modifying and Adding Proposal Content (End User)*
- *Printing Proposals (End User)*
- *Locking Proposals (End User)*
- *Samples of Proposal Templates*
- *Samples of Proposal Field Mappings*

About Siebel Proposals

Siebel Proposals enables sales representatives to create proposals using templates that you create in Microsoft Word.

Traditionally, sales representatives create proposals by starting with a past proposal and then modifying it for the current prospect. Sales representatives must not only change such basic information as the customer name, but also possibly restructure the proposal so that it fits the new prospect's unique needs. For example, the original proposal might focus on price, but the new proposal might focus other decision criteria, such as speed or extra functionality.

After the administrator creates the correct templates, the sales representative can click one button to build the correct proposal for a specific account or opportunity. Siebel Proposals uses information that sales representatives enter in the early stages of an opportunity to create the proposal.

Sales representatives can add deal-specific information to the proposal without worrying about formatting or presentation. Using the Proposal Library, sales representatives can find any additional information and automatically insert it into the proposal.

Note: The Siebel proposal document engine also creates agreement documents. Administrators who create the agreement templates can follow the procedures in this chapter for creating proposals. Users can then select the agreement template and generate an agreement document.

System Requirements for Siebel Proposals

Certain system requirements must be met to use Siebel Proposals. For information about the Documentation Server and other software that is required for Siebel Proposals, see *Document Server*.

System Requirements for the Siebel Web Client

Before you can use Siebel Proposals, you must meet the system requirements for the Siebel Web Client.

To meet the system requirements for the Siebel Web Client:

1. Install on the server, such as a Siebel Server and a Web Server, all of the components that are required to use the Siebel application.
2. Install the Document Server on one or more Windows computers.
3. Install Microsoft Office on the Document Server computer.

Note: If you deploy the Siebel Server in UNIX and want to use Siebel Proposals, a separate Windows computer is required for the Document Server.

Siebel Proposals uses the Document Server. The Document Server is a component of the Siebel Server that lets users on the Web work with Microsoft Word documents that are on the server. For more information about installing the components required to use the Siebel application, see *Siebel Installation Guide* .

Before employees or partners can use Siebel Proposals, they must have the following:

- A web browser to use the Siebel application.

  Note: Platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

- (Optional) Microsoft Office to edit proposals.

System Requirements for the Siebel Remote Web Client

Siebel Proposals is available for the Siebel Remote Web Client and the Siebel Web Client. The user interface for Proposals is identical in the Siebel Remote Web Client and the Siebel Web Client.

Siebel Remote Web Client processes requests to generate proposals locally so that field sales representatives can generate proposals while traveling. To run Siebel Proposals on the Siebel Remote Web Client, Microsoft Office must be installed on the same computer as the Siebel Remote Web Client.

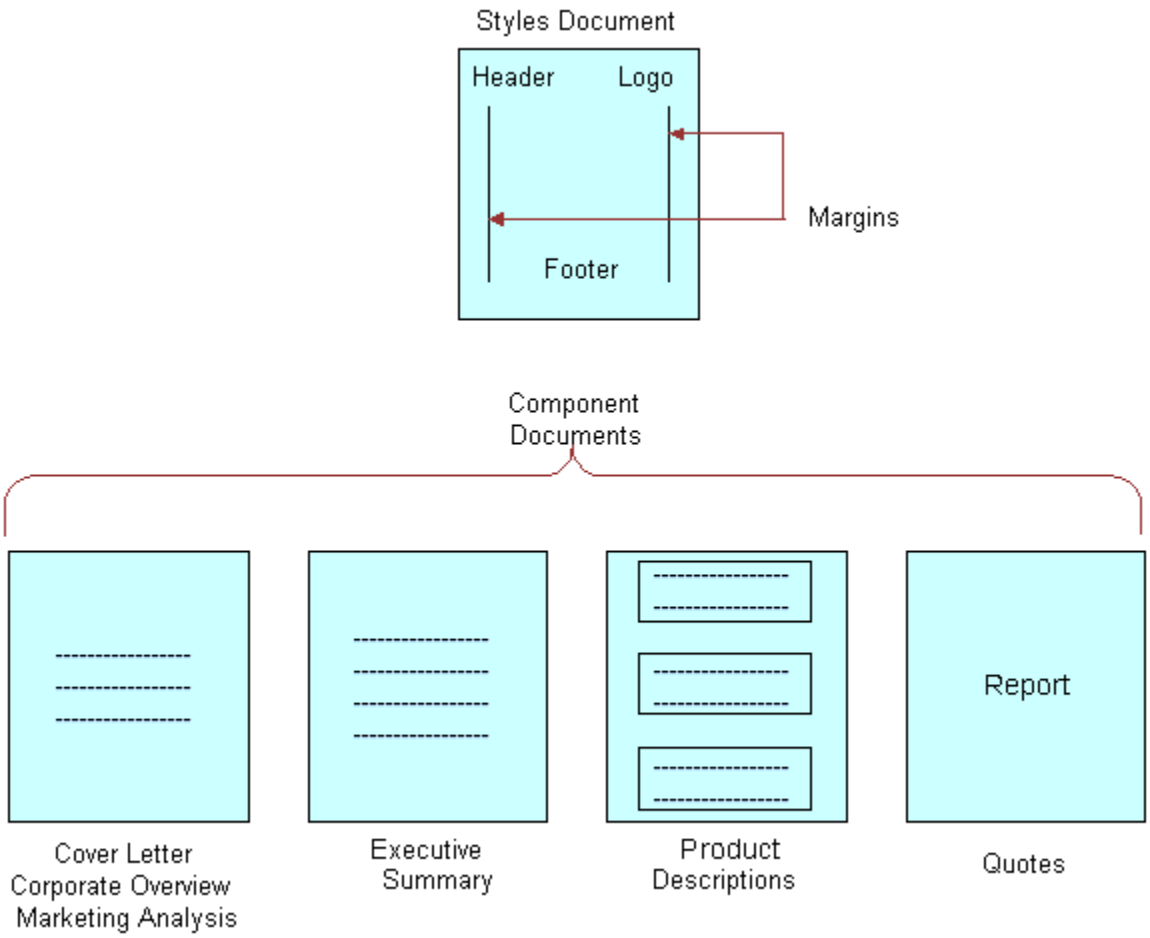
Process of Creating Proposal Templates

To create proposal templates, perform the following tasks:

1. *Creating Proposal Template Documents in Microsoft Word*. Create Microsoft Word documents. To create the documents for the template, you must write the text and insert bookmarks for such variables as company, contact name, and address.
2. *Creating Records for Proposal Templates*. Use the Siebel application to create a single record for the template.
3. *Defining Proposal Template Sections*. Create the proposal structure. Specify the sections the proposal contains.
4. *Adding Components to Proposal Template Sections*. Specify the components each section contains.
5. *Using Conditions in Proposal Templates*. Use conditions in sections or components. You can add conditions to specify that sections or components are included in the proposal only under certain circumstances.
6. *Defining Proposal Field Mappings*. Specify the Siebel objects that correspond to each bookmark in the Microsoft Word component documents. You also specify the name of this mapping in the template record.
7. *Associating Field Mappings with Proposal Templates*. Associate the mapping with a template to make it apply to all the components in that template.
8. *Creating the Proposal Library*. Create a separate library of documents that sales representatives can draw upon to customize their proposals. You can perform this optional step at any time.
9. *Enabling Users to Display Proposals in HTML Format*. Update settings on the Document Server to enable end users to view proposals in HTML format.

Creating Proposal Template Documents in Microsoft Word

The first step for creating proposal templates is to create documents in Microsoft Word. The following image shows these documents consist of one styles document and multiple component documents (such as Cover Letter, Executive Summary, Product Descriptions, and Quotes).



The component documents in the image are examples. You can use other component documents, such as a table of contents or a set of collateral, and you can exclude some of these component documents, such as product descriptions. However, a template must have a styles document and one or more component documents.

Note: Platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

Proposals can use the fields from only one business object. If you want to include additional fields, you must use Siebel Tools to add the business components that include these fields to the business object that is the basis of the proposal.

This task is a step in *Process of Creating Proposal Templates*.

Planning Proposal Templates

Before you create the documents in Microsoft Word, you must determine the format of the proposal and the information to include in the proposal.

Begin by reviewing previous successful proposals to see the sections they contain. For example, do they all contain a cover letter, an executive summary, and a quote? Also, review the current documents you have on hand, and note the customer questions these documents answer. Then determine how to organize the information. What topics are standard across all proposals? What topics are specific to certain proposals? What is the best order for the parts the

proposal? Finally, determine the fields to insert to customize the proposal (for example, contact name, account name, and industry). You use this information to create bookmarks in the Microsoft Word documents.

As part of planning, you can review the sample templates that come with Siebel Proposals. For more information, see *Samples of Proposal Templates*.

Creating a Styles Document

After you plan a template, you can create the styles document for the template. This Microsoft Word document defines the layout and formatting of the entire proposal. The layout options you specify are automatically applied to all the component documents for the proposal. This styles document can include headers, footers, logos, and special margins.

> **Note:** Do not enter any content into this document. The content comes from the individual component documents that you create later.

To create a styles document

1. Create a new document in Microsoft Word.
2. Set up margins, headers, footers, fonts, and other layout options for the template.

   For more information about completing these tasks, see the online help for Microsoft Word.
3. Save and close the file.

   Choose a name that uses only alphanumeric characters, and use the DOC file extension for Microsoft Word.

Creating Component Documents for Proposal Templates

After you create the styles document for the template, you can create the component documents. A component document is a Microsoft Word document that includes standard text and personalized data. For example, a cover letter component document includes standard cover-letter text and personalized data such as the name and address of the contact to whom the letter is addressed.

To create a component document, you enter the standard text in a Microsoft Word document and then create *bookmarks*, or Microsoft Word placeholders for custom data. When a sales representative generates a proposal, these bookmarks are replaced with data from the Siebel application.

To create a component document with bookmarks in Microsoft Word

1. Create a new document in Microsoft Word.
2. Enter the standard text for the component document.

3. Use the bookmark feature in Microsoft Word to add bookmarks to the locations in the component document to which you want to insert Siebel field data.

   For example, you can create a Company bookmark for the Siebel Account field. For more information about using the bookmark feature, see the online help for Microsoft Word.

   > **Note:** If the text inserted into a bookmark contains double quotes ("), the inserted text is automatically preceded by a backslash (\). If you do not want the backslash to appear in the inserted text, change the double quotes to single quotes in the Siebel application.

4. Note the names of the bookmarks because you need these names when you map the bookmarks to Siebel field names.

   For more information, see *Defining Proposal Field Mappings*.
5. Save the component document as a DOC file.

Creating Records for Proposal Templates

After you create template documents in Microsoft Word, you can use Siebel Proposals create a record for the proposal template.

This task is a step in *Process of Creating Proposal Templates*.

To create a record for a proposal template

1. Navigate to the Administration - Document screen, then the Proposal Templates view.
2. In the Templates list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	Type a name for the template.
Default	Select the check box to indicate this template is the default proposal template. When a user clicks Auto Proposal, Siebel Proposals uses the default template if there are no decision issues that match the theme of a proposal. You can select only one Opportunity Proposal default and one Account Proposal default.
Category	Select one of the following types of templates: ○ **Opportunity Proposal.** These templates are available only when you are working with Opportunities. ○ **Account Proposal.** These templates are available only when you are working with Accounts. ○ **Agreement.** These templates are available when you are working with Oracle Professional Services Agreements. ○ **Quote.** These templates are available only when you are working with Quotes.

Field	Comments
	○ **Order.** These templates are available only when you are working with Orders.
Mapping Name	Leave this field blank until you create a mapping. Then, select the mapping name that indicates the group of bookmark fields to use with the template.
Template File Name	Select the Microsoft Word template document to attach the document to the template. (This document is the styles document.)
Theme	Select a theme if you want to associate the template with a decision issue. When you assign a proposal template a theme, you associate it with a decision issue that is important for an opportunity. When a proposal theme matches the number one decision issue for the current opportunity, Siebel Proposals automatically selects the correct template when the user clicks Auto Proposal. Users can also select a theme template. Because accounts and agreements do not relate to decision issues, the Theme field is not applicable for Account Proposal, Agreement, Quote, or Order templates. It applies only to Opportunity Proposal templates.
Description	Type a description of the template.
Language	Select the language in which the template is written.
Locale	Select the locale. Only the templates specific to this locale appear.

Defining Proposal Template Sections

After you create the Microsoft Word documents and a record for the template, define the structure of the proposal template. A proposal is made up of sections that divide and subdivide the proposal. A single section might contain multiple components or a single component.

The type of a section depends on the nature of the data it contains. For example, file sections contain documents, chart sections reference Siebel charts, and so on.

You define the structure of the proposal template by creating sections in the Proposal Templates view of the Administration - Document screen. Sections are associated with the template record you create for the template. You must create high-level sections. Optionally, you can add subsections to these sections. The proposal structure can include multiple levels of sections because a subsection can contain other subsections.

This task is a step in *Process of Creating Proposal Templates*.

Creating High-Level Sections for Proposal Templates

You must create high-level sections to insert into proposal templates.

To create a high-level section

1. Navigate to the Administration - Document screen, then the Proposal Templates view.
2. Navigate to the Sections list by completing the following steps:
   a. In the Templates explorer, click the arrow icon next to the template name folder.
   b. Click the arrow icon next to the Sections folder under the template name folder.
3. In the Sections list, create a new record, complete the fields described in the following table.

Field	Comments
Name	Type the name of the section.
Sequence	Type a number to indicate the order in which the section appears in the proposal.

4. In the Section Type field, select the type of section.

   The available section types are described in the following table.

Type	Comments
Chart	Inserts a Siebel chart. You can insert the chart in the side margins or in the center of the proposal, and you can change the x, y, and z axes in the chart.
File	Inserts the content of files in DOC or TXT format.
Locator	Inserts documents from the Siebel Encyclopedia. The Add Sales Tools dialog box displays the content in the Siebel Encyclopedia. For more information, see *Adding Components to Proposal Template Sections*. For example, Siebel Proposals can dynamically insert documents from the Siebel Encyclopedia that relate to the products of interest for an opportunity. If you want to dynamically insert text related to the products for the opportunity, use a locator section type. The file types must be DOC, TXT, or RTF. If more than one document meets the locator criteria you specify, Siebel Proposals inserts each document.
Organization Chart	Inserts organization charts for the account or opportunity associated with the template. Charts are automatically centered in the proposal.
Report	Dynamically inserts a Siebel report, such as Siebel Quote.

Type	Comments
Table	Inserts Siebel application data into a table format. You select the fields to include, the sequence of the fields, and the column lengths. Tables are automatically centered in the proposal. For a table section type, you can also create a related table section. For more information, see *Adding Related Table Subsections to Proposal Templates*.

5. Complete the fields applicable to the section type.

   For the Chart section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Proposal Templates*.
Business Object	Select the Siebel business object from which the chart information is taken. The Business Objects dialog box shows all available Siebel business objects. For example, select Opportunity.
Chart or Table Name	Select the name of the chart applet. For example, select Opportunity Chart Applet - Current Opportunity Analysis. To display records from a multi-value group (MVG), select a list applet, not an MVG applet. If the list applet that you want is not available, use Siebel Tools to create the list applet for the child business component in the MVG. You do not need to associate this new list applet with a view.
Search Spec	Type the search criteria to use to restrict data for the chart. For example, if you want to include revenue greater than $500,000, type Revenue > 500000.
Width	Type the width the chart in the proposal document. The default width is 400 pixels.
Height	Type the height of the chart in the proposal document. The default height is 300 pixels.
Category	Type the option to use for the X-axis in charts that provide multiple X-axis options. For example, in the Lead Analysis by Rep chart, type Sales Representative or Quality.
Function	Type the option to use for the Y-axis in charts that provide multiple Y-axis options. For example, in the Lead Analysis by Rep chart, type Number of Opportunities, Opportunity Revenue, or Average Opportunity Revenue.
Series	Type the option to use for the Z-axis in charts that provide multiple Z-axis options.

Field	Comments
Chart Location	Select the location of the chart on the proposal page. For example, select one of the following as required: a. Left to insert the chart next to the inside margin of the page. b. Center to insert the chart in the middle of the page. c. Right to insert the chart next to the outside margin of the page. Any text components you include in the chart section wrap around the chart. For example, if you insert the chart next tothe inside margin of the page, then the text component is inserted beside the chart.

For the File section type, complete the field described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Proposal Templates*.

For the Locator section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Proposal Templates*.
Information Retrieval Method	Select the relationship to use to find literature. For example, select Oppty Competitor Literature for the literature about competitors associated with an opportunity.
Retrieved Literature Category	Select the type of literature (for example, brochures or specification sheets) to filter the documents from the Siebel Encyclopedia that you want to include in the proposal.

For the Organization Chart section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Proposal Templates*.
Business Object	Select the Siebel business object from which the organization chart information is taken. The Business Objects dialog box shows all available Siebel business objects.

Field	Comments
Chart or Table Name	Select the name of the applet that contains the organization chart data. For example, select Opportunity Organization Analysis Applet.

For the Report section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Proposal Templates*.
Business Object	Select the Siebel business object from which the report information is taken. The Business Objects dialog box shows all available Siebel business objects. For example, select Quote.
Report Name	Select the name of the report. The Reports dialog box shows all available reports. For example, select Proposal Quote.
Link Spec	Type the data to insert in the report. The syntax of this field follows: `<Parent Business Component Name><Comma><Parent-ID Field Name><Slash><Child Business Component Name><Comma><Child-ID Field Name>` You can find Link Spec information in the Siebel repository. For descriptions of these fields, see *Siebel Tools Online Help* . For a proposal quote, the Link Spec is Opportunity, Id/Quote, Opportunity Id. The Child-ID-Field-Name depends on if the relationship between the parent business component and child business component is one-to-many or many-to-many.
Search Spec	Type the search criteria to use to restrict data for the report. For example, if you want to insert only the active quotes for an opportunity, type Active = 'Y'.

For the Table section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Proposal Templates*.

Field	Comments
Business Object	Select the Siebel object from which the table information is taken. The Business Objects dialog box shows all available Siebel business objects. For example, select Opportunity.
Chart or Table Name	Select the name of the applet that contains the table data. For example, if you want to include the products in an opportunity, select Opportunity Product Applet.
Width	Type the width that represents the percentage of the space available between the template margins. A value of 100 equates to 100% of the space between the template margins. If this field is blank, the width of the columns in the table is based on pixels.
Table Fields	Click the select button to open the Table Fields dialog box. For each table field, add a new record, and complete the following fields for the record: ○ **Field Name.** Type the field name of the field. For example, type Product. ○ **Sequence.** Type the sequence in which you want the field to appear in the table. ○ **Width.** Type the width of the field column in the table. Column width is measured in pixels. The default (and minimum) column width is 100 pixels. You can also define column width by a percentage of the table width. When you enter a value for table width, column width equates to a percentage of total table width. For example, if there are three fields in a table, and the table width is 100, field widths of 25, 65, and 35 equate to 25%, 65%, and 35% of the total table width. If the table width is blank, the field widths equate to 25, 65, and 35 pixels. ○ **Alignment.** Select the alignment of the data in the field. For example, select Left, Center, or Right.

Adding Subsections to Proposal Templates

After adding high-level sections, you can add subsections to them.

To add subsections to an existing section

1. Navigate to the Administration - Document screen, then the Proposal Templates view.
2. Navigate to the Sections list for subsections by completing the following steps:
   a. In the Templates explorer, click the arrow icon next to the template name folder.
   b. Click the arrow icon next to the Sections folder under the template name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
   d. Click the arrow icon next to the Sections folder under the section name folder.
3. In the Sections list, add subsections in the same way you add high-level sections.

   For more information, see *Creating High-Level Sections for Proposal Templates*.

   > **Note:** When a proposal is generated, a section is generated before any of its subsections and appears before subsections in the finished document.

Adding Related Table Subsections to Proposal Templates

After adding a Table Name section, you can add related tables that provide detailed information for the table. For example, if the tables subsection contains a quote record, the related table can contain the quote line items. The relationship between the information is essentially a parent-child-grandchild relationship; the opportunity is the parent, the quote table is the child, and the related table containing the quote line items is the grandchild.

To add a related table subsection

1. Navigate to the Administration - Document screen, then the Proposal Templates view.
2. Navigate to the Sections list by completing the following steps:
   a. In the Templates explorer, click the arrow icon next to the template name folder.
   b. Click the arrow icon next to the Sections folder under the template name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
3. In the Sections list, make sure that the Section Type field for the selected section has a value of Table and that the Chart or Table Name field for the selected section has a table name.
4. In the Templates explorer, click the arrow icon next to the Related Table folder under the section name folder.

   Note: The Related Table folder in the Templates explorer applies to only the Table section type. You can add related tables only for the Table section type.

5. In the Related Table form, create a new record, and complete the fields described in the following table.

Field	Comments
Business Object	Select the Siebel object to which this table is related.
Table Name	Select the name of the related table applet.
Field Name	Select the fields to appear in the table. If you select no fields, all fields appear. The width is interpreted the same way as the parent table section. If the width of the table section is set, the width of the fields is used as percentages instead of pixels.

Adding Components to Proposal Template Sections

After you define the structure of the proposal, you must specify the location of the component documents that make up the bulk of the proposal.

For sections that extract data from a Siebel database (such as a Chart section), you specified all the information necessary to generate the appropriate contents. However, the component documents that you create earlier in Microsoft Word are not part of the proposal until you add them to the appropriate sections.

Note: You can add components to any section type (not just a File section type), and a section can contain multiple components.

This task is a step in *Process of Creating Proposal Templates*.

To add a component to a proposal template section

1. Navigate to the Administration - Document screen, then the Proposal Templates view.
2. Navigate to the Components list by completing the following steps:
   a. In the Templates explorer, click the arrow icon next to the template name folder.
   b. Click the arrow icon next to the Sections folder under the template name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
   d. Click the arrow icon next to the Components folder under the section name folder.
3. In the Components list, create a new record.
4. In the Add Sales Tools dialog box, select the component you want to add, and click Add.
5. If the component does not appear in the Add Sales Tools dialog box, create a new record in the dialog box, and complete the fields described in the following table.

Field	Comments
Name	Type a name for the component.
Sequence	Type a number to indicate the order in which the component appears in the section.
Filename	Select the file for the component.
Condition	Type a condition. The component appears only when the condition is TRUE.

Using Conditions in Proposal Templates

You can add query conditions to a section or a component to specify the conditions under which the section or component is used in the proposal. For example, if you have an executive summary for deals of over $100,000 and another executive summary for smaller deals, you can use the Condition field in each Executive Summary section to enable Siebel Proposals to insert the appropriate executive summary when the appropriate conditions are TRUE.

This task is a step in *Process of Creating Proposal Templates*.

Entering Criteria

You can enter query criteria (such as [Revenue] > 100000) in the Condition field of a section or component record. If the condition is TRUE, the section or component is included in the proposal. If the condition is FALSE, the section or component is not included. If you do not specify a condition, the section or component is always included.

You can create conditions for any field that relates to the business object of the proposal; use Opportunity fields for opportunity proposals, and Account fields for account proposals. If the definition of a condition must be based on fields from another business object, you must add those fields to the Opportunity, Account, Order, or Quote business object through either a link or a join.

The syntax for conditions is similar to the syntax for Siebel queries. For more information about the syntax for Siebel queries, see *Siebel Fundamentals* and *Siebel Developer's Reference* .

Examples of Criteria

The following examples illustrate the syntax for conditions:

- If an opportunity applies to a Pentium computer, you want to insert a component about the advantages of the new Pentium II chip. In the Condition field for the component, enter the following condition:

  ```
  EXISTS ([Product] LIKE "Pentium*")
  ```

  This condition reviews the products for the opportunity. If the product name begins with Pentium, Siebel Proposals inserts the component. Otherwise, Siebel Proposals leaves out the component.

  > **Note:** To use a product in a condition, the product must be entered in the Products view of the Opportunities screen. The condition does not apply to products that are entered as quote line items.

- If the account is located in Georgia, enter a section with terms and conditions limited to that state. In the Condition field of the section, enter the following:

  ```
  EXISTS ([State] = "GA")
  ```

  or

  ```
  [State] = "GA"
  ```

  You use the first line if the account is located only in Georgia, and use the second line if the account is located in Georgia and another location.

  This condition reviews the state for the account. If the state is Georgia, then Siebel Proposals includes the section in the proposal. Otherwise, Siebel Proposals skips this section and moves on to the next section.

- If the opportunity has a revenue amount greater than $1,000,000 and it is expected to close in 2003, insert a component on a special program for this type of customer. Enter the following condition in the Condition field for the component:

  ```
  [Revenue] > 1000000 AND [Close Date] <= ("12/31/2003") AND [Close Date] >=
  ```

```
("1/1/2003")
```

After you enter a condition, test it as a query in the view to use it in. For example, you can test this condition as a query in the My Opportunities view. If the query returns the data you expect, the query is probably in the correct format for the Condition field.

Defining Proposal Field Mappings

When you create the component documents of the proposal, you probably include bookmarks for personalized fields. You must map the bookmarks in the component documents to Siebel fields.

This mapping designates the Siebel field to use for substituting data for a bookmark in the component document. For example, by mapping the Company bookmark to the Account field, each Company bookmark is replaced with the value of the Account field.

You cannot map fields to a bookmark in the header or footer of the template unless that bookmark is also somewhere else in the content of the template, other than in the footer or header.

Because you might work with multiple proposal templates, you can have multiple sets of bookmarks. Therefore, you might use one mapping for one proposal template and another mapping for another proposal template, or you might use a single mapping for several proposal templates. In either case, you must specify a mapping name in the template record to associate the template with a specific mapping.

If you map a bookmark to a multi-value field, the primary record of the group is retrieved. If you want to retrieve multiple values from a multi-value field, you can add a Table section type to the proposal template. This section type retrieves multiple values from the multi-value field in table format.

This task is a step in *Process of Creating Proposal Templates*.

Note: You can base the mappings on the sample mappings that come with Siebel Proposals. For more information, see *Samples of Proposal Templates*.

Creating Field Mappings for Proposals

To create a field mapping, create a record for the mapping, and then map the fields.

Note: For Siebel Tools objects to be accessible in the Siebel application, the Siebel repository must be updated in the appropriate database.

To create a field mapping for proposals

1. Navigate to the Administration - Document screen, then the Proposal Field Mappings view.

2. In the Business Objects list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Mapping Name	Type a name for the mapping.
Business Object	Select the business object that contains fields in the proposal. For example, to create an opportunity proposal, select the Opportunity business object.
Description	Type a description of the mapping.

3. Navigate to the Business Components list by completing the following steps:
   a. In the Business Objects explorer, click the arrow icon next to the business object name folder.
   b. Click the arrow icon next to this Business Components folder under the business object name folder.
4. In the Business Components list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Business Component	Select the business component. The business component must be related to the business object.
Search Specification	Type the search specification. The search specification limits the records returned for the business component. If you do not designate a search specification, all records for the business component are returned.

> **Note:** You can associate more than one business component mapping with an object. For example, to create an opportunity proposal, you select the Opportunity business component. You can also select the TAS Account business component to create mappings for views under the Opportunity TAS view.

Mapping the Fields for Proposals

After you create a record for the mapping, you can map the fields. For information about samples, see *Samples of Proposal Templates*.

To map the fields for proposals

1. Navigate to the Administration - Document screen, then the Proposal Field Mappings view.

2. Navigate to the Business Component Fields list by completing the following steps:
    a. In the Business Objects explorer, click the arrow icon next to the business object name folder.
    b. Click the arrow icon next to this Business Components folder under the business object name folder.
    c. Click the arrow icon next to the business component name folder under the Business Components folder.
    d. Click the arrow icon next to the Business Component Fields folder under the business component name folder.
3. In the Business Component Fields list, create a new record for each field to map, and complete the necessary fields.

    Some fields are described in the following table.

Field	Comments
Bookmark	Type the bookmark you added to the Microsoft Word component document.
Business Component Field	Select the field in the business component.

Associating Field Mappings with Proposal Templates

After you create a mapping, you must associate it with a template so that it applies to all the components in that template. You can associate a mapping with one or more templates.

This task is a step in *Process of Creating Proposal Templates*.

To associate a field mapping with a proposal template

1. Navigate to the Administration - Document screen, then the Proposal Templates view.
2. In the Templates list, select the record for the template with which you want to associate the mapping.
3. In the Mapping Name field, select the mapping.

Creating the Proposal Library

Administrators can create and maintain a Proposal Library that consists of text blocks that sales representatives can add to the proposals. In the Siebel File System, these text blocks are components with the File section type.

Documents in the Proposal Library are different from the other component documents you create. Component documents are part of the proposal template, and are automatically included in proposals generated from that template. Documents in the Proposal Library are available to sales representatives as needed. Administrators can also recommend Proposal Library documents to include in the templates.

After sales representatives create a default proposal automatically, they can add more documents from the Proposal Library or use the Edit Layout button to customize the proposal. The Proposal Library enables multiple proposals

created from the same template to have different content, and it can help sales representatives find answers to specific Request for Proposal (RFP) questions.

Administrators add the various components to the Proposal Library and maintain the information. When the sales representatives need additional text to add to a proposal, they review the component in the Proposal Library, select the component they want to insert, and automatically insert it into the proposal.

The sales force cannot update the information in the Proposal Library. The only sections and components available to sales representatives are those you provide for them.

This task is a step in *Process of Creating Proposal Templates*.

Creating Document Files for the Proposal Library

You create document files for the Proposal Library in the same way that you create the proposal templates. Use Microsoft Word to enter text and bookmarks, and then map these bookmarks to fields in your Siebel database.

> **Note:** You can include only the File section type in the Proposal Library. Include other section types only in the initial template. For more information, see *Defining Proposal Template Sections*.

Adding Sections to the Proposal Library

Sections organize documents in the Proposal Library. For example, if some of the documents in the Proposal Library are white papers and others are specifications, you can create a section for each of these document types. Users can browse through the white papers and the specifications separately. You must add at least one section to the Proposal Library. For more information about adding sections, see *Defining Proposal Template Sections*.

To add sections to the Proposal Library

1. Navigate to the Administration - Document screen, then the Proposal Library view.
2. Navigate to the Sections list of the Proposal Library by completing the following steps:
   a. In the Library explorer, click the arrow icon next to the Library folder if that folder is not already open.
   b. Click the arrow icon next to the Proposal Library folder under the Library folder.
   c. Click the arrow icon next to the Sections folder under the Proposal Library folder.
3. In the Sections list, add sections in the same way that you add sections to a proposal.

Adding Components to the Proposal Library

After adding sections to the Proposal Library, you add components to the sections. For more information about adding components, see *Adding Components to Proposal Template Sections*.

To add components to the Proposal Library

1. Navigate to the Administration - Document screen, then the Proposal Library view.
2. Navigate to the Components list of the Proposal Library by completing the following steps:
   a. In the Library explorer, click the arrow icon next to the Library folder if that folder is not already open.

b. Click the arrow icon next to the Proposal Library folder under the Library folder.
c. Click the arrow icon next to the Sections folder under the Proposal Library folder.
d. Click the arrow icon next to the section name folder under the Sections folder.
e. Click the arrow icon next to the Components folder under the section name folder.

3. In the Components list, add the components in the same way that you add components to a proposal.

Recommending Content for Proposals

An administrator can simplify the process of creating a proposal by associating recommended content with the proposal template.

To recommend content for a proposal

1. Navigate to the Administration - Document screen, then the Proposal Library view.
2. Navigate to the Components list of the Proposal Library by completing the following steps:

   a. In the Library explorer, click the arrow icon next to the Library folder if that folder is not already open.
   b. Click the arrow icon next to the Proposal Library folder under the Library folder.
   c. Click the arrow icon next to the Sections folder under the Proposal Library folder.
   d. Click the arrow icon next to the section name folder under the Sections folder.
   e. Click the arrow icon next to the Components folder under the section name folder.

3. In the Components list, select the component, click the select button in the Recommended Templates field.
4. In the Proposal Templates dialog box, select the template for which to recommend the component.

   You can recommend a component for multiple templates. For example, you might recommend a legal clause for all templates. Recommended content appears when a user edits a proposal using the Edit Layout button, and the Show Recommended Only check box is selected.

Enabling Users to Display Proposals in HTML Format

By default, proposals are saved only in a document format, not in HTML format. The View HTML button is unavailable, and the user cannot view the proposals in HTML format. To enable users to display proposals in HTML format, you must edit the DocumentServerViewHTML parameter to a value TRUE instead of FALSE.

Note: Users of the Siebel Remote Web Client cannot view proposals in HTML format.

This task is a step in *Process of Creating Proposal Templates*.

To enable users to display proposals in HTML format

1. Start the Server Manager.

2. Enter the following command:

```
srvrmgr> change param DocumentServerViewHTML=True for comp DocServer
```

> **Note:** You can also change parameters in the Administration - Server Configuration screen. For more information, see *Siebel System Administration Guide* .

About Generating Proposals

A proposal is an offer to sell products or services with specific terms and conditions. Even a simple proposal consists of several sections such as a cover letter, an executive summary, and a price quotation.

Using proposal templates that the administrator creates, sales representatives can create, modify, and print proposals for an opportunity by using the Proposals view of the Opportunities screen.

A proposal uses the details you record about an account or opportunity and combines the details with a predefined template to create a document tailored to the customer needs. The template defines the initial formatting and structure of the proposal, and can include predefined components, such as text, tables, and diagrams that address specific issues. You can also set up a template to include files from the Proposal Library, such as files that contain product descriptions and standard terms and conditions.

After generating a proposal, you can modify it to meet the customer needs by changing the order of the documents and adding documents from the Proposal Library. When the proposal is complete, you can print it.

Scenario for Generating Proposals

This topic gives one example of how a sales representative might generate proposals for accounts. You might generate proposals differently, depending on your business model.

A software company receives a Request for Proposal (RFP) from a prospect interested in outsourcing part of the information technology department. The sales representative assigned to the RFP selects the opportunity in Siebel Sales, and then creates a new proposal record using the company's standard template for proposals.

The sales representative composes a draft of a proposal that meets the requirements of the RFP, adding sections, such as a cover letter, executive summary, the proposal body, and sections that outline the company's experience and references. After conferring with sales team members, the sales representative modifies the proposal, changing the order of some of the sections, and adding other sections from the Proposal Library.

Process of Generating Proposals (End User)

To generate proposals, perform the following tasks:

1. *Creating Proposals (End User)*
2. *Generating a Proposal Draft (End User)*
3. *Modifying and Adding Proposal Content (End User)*
4. *Printing Proposals (End User)*

5. *Locking Proposals (End User)*

Creating Proposals (End User)

Before end users can generate a draft of the proposal, they must create a proposal and associate the proposal with an opportunity or account. The following procedure explains how to create a proposal using the Opportunities screen. You can also use the Accounts screen.

This task is a step in *Process of Generating Proposals (End User)*.

To create a proposal

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record.
3. Navigate to the Proposals view, and click Auto Proposal.

   A proposal is automatically generated using a default template or the template for the decision issue associated with the opportunity.

   > **Note:** To generate a proposal using a different template, select a different template in the Template field of the proposal record.

Generating a Proposal Draft (End User)

After creating a proposal, end users can generate a proposal draft. The draft is a document that end users can edit if Microsoft Word is installed on their computers.

End users creating a proposal in a Siebel Web Client environment (network connection) can follow all of the steps in the procedure in this topic. End users creating a proposal in a Siebel Mobile Web Client environment (remote), and who have the Siebel Mobile Web Client installed locally, can omit the final step in this procedure.

This task is a step in *Process of Generating Proposals (End User)*.

To generate a proposal draft

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, select the proposal in the Proposals list, and click Generate Draft.

   The Status field changes to a value of In Queue, and a draft of the proposal is created if you are working in a Siebel Mobile Web Client environment (remote).
4. Click Update to generate a proposal draft from the server if you are working in a Siebel Web Client environment.

   The status of the proposal refreshes. Status field values include In Progress, Generating, Completed, and Failed.

Modifying and Adding Proposal Content (End User)

After creating and reviewing a draft of a proposal, end users can change the content in the proposal.

This task is a step in *Process of Generating Proposals (End User)*.

Viewing the Structure of Proposals

End users can view the structure of a proposal in the Proposal Table of Contents explorer. In this explorer, they can view the hierarchy of sections and components included in a proposal.

Sections are the headings that appear in the proposal. Sections can contain subsections and components. Components consist of the actual information that appears in the proposal. A component can contain multiple files.

To view the structure of a proposal

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, select the proposal in the Proposals list, and drill down on the Name field.
4. In the Proposal Table of Contents explorer, click the arrow icon next to the proposal name folder to show its contents.
5. Click the arrow icon next to each folder in the proposal to show more content.

Adding Sections for Proposal Library Components

If an administrator creates optional components in the Proposal Library, end users can customize the proposal by adding these components. The Edit Layout button enables end users to add components in the Proposal Library to a proposal. Complete the procedure in this topic to add new sections to a proposal. These new sections contain components in the Proposal Library.

To add sections for Proposal Library components

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, select the proposal in the Proposals list, and click Edit Layout.
4. To display more components in the Content Library list of the Template Layout dialog box, clear the Show Recommended Only check box.

   > **Note:** If the Show Recommended Only check box is selected, only those components that the administrator recommends appear in the Content Library list. If this check box is cleared, all available components appear in the Content Library list. For more information about recommended content, see *Creating the Proposal Library*.

5. In the Template Layout dialog box, move components from the Content Library list to the Table of Contents list, and click Save.
   If you make a mistake, click Reset Layout to undo all changes to the Table of Contents list.
6. To see the new content in the proposal, complete the following steps:

a. In the Proposals list, drill down on the Name field of the proposal.
b. In the Proposal Table of Contents explorer, click the arrow icon next to the proposal name folder.
c. Click the arrow icon next to the Sections folder under the proposal name folder.

The new sections appear under the Sections folder.

Changing the Order of Sections in Proposals

When end users add a section to a proposal, the section sequence numbers are not automatically regenerated. If you insert a section in a proposal, you must modify each sequence number for the proposal. The sequence numbers in the Proposals list determine the order in which sections appear in the proposal.

You can use the Edit Layout button and the Proposal Table of Contents explorer to re-sequence proposal sections.

Changing the Order of Proposal Sections Using Edit Layout Button

Complete the following procedure to use the Edit Layout button to re-sequence proposal sections.

To change the order of proposal sections using Edit Layout button

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, select the proposal in the Proposals list, and click Edit Layout.
4. In the Template Layout dialog box, change the order of the sections or remove sections, and click Save.

> **Note:** The Show Recommended Only check box is automatically selected in the Template Layout dialog box only if the Content Library list contains recommended components. Otherwise, the check box is cleared.

Changing the Order of Proposal Sections Using Proposal Table of Contents Explorer

Complete the following procedure to use the Proposal Table of Contents explorer to re-sequence proposal sections.

To change the order of proposal sections using Proposal Table of Contents explorer

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, and drill down on the Name field of the proposal in the Proposals list.
4. Navigate to the Sections list by completing the following steps:
   a. In the Proposal Table of Contents explorer, click the arrow icon next to the proposal name folder.
   b. Click the arrow icon next to the Sections folder under the proposal name folder.
5. In the Sections list, change the number in the Sequence field for each section.
6. If you want to remove a section from a proposal, select the section, and delete it.

Adding Components to Proposals

Components are the boilerplate text that you can add to a proposal. End users can add components to sections from the Proposal Library, from the Siebel Encyclopedia, and from another location, such as a local hard drive. You can add more than one component to a section.

The Proposal Library includes a hierarchical structure that administrators can use when designing literature components to associate with a proposal. Using the Proposal Library, end users can navigate to a section or subsection, and then select the component file associated with the section.

Adding Components from the Proposal Library

Complete the following procedure to add a component from the Proposal Library.

To add a component from the Proposal Library

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, and drill down on the Name field of the proposal in the Proposals list.
4. Navigate to the Sections list by completing the following steps:
    a. In the Proposals Table of Contents explorer, click the arrow icon next to the proposal name folder.
    b. Click the arrow icon next to the Sections folder under the proposal name folder.
    c. Click the arrow icon next to the section name folder under the Sections folder.
5. In the Sections list, click Library.
6. Navigate to the Components list of the Proposal Library by completing the following steps:
    a. In the Library explorer, click the arrow icon next to the Proposal Library folder.
    b. Click the arrow icon next to the Sections folder under the Proposal Library folder.
    c. Click the arrow icon next to the section name folder under the Sections folder.
    d. Click the arrow icon next to the Components folder under the section name folder.
7. In the Components list, select the component to add, and click Add Components.

    The component file is added to the Components folder for the section you selected in Step 4 of this procedure.

Adding Components from the Siebel Encyclopedia

Complete the following procedure to add a component from the Siebel Encyclopedia.

To add a component from the Siebel Encyclopedia

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, and drill down on the Name field of the proposal in the Proposals list.
4. Navigate to the Components list by completing the following steps:
    a. In the Proposal Table of Contents explorer, click the arrow icon next to the proposal name folder.
    b. Click the arrow icon next to the Sections folder under the proposal name folder.
    c. Click the arrow icon next to the section name folder under the Sections folder.

   d. Click the arrow icon next to the Components folder under the section name folder.
5. In the Components list, create a new record.
6. In the Add Sales Tools dialog box, select the component you want to add, and click Add.

Note: You can add only DOC and TXT files as components directly into a template section.

Adding Components from the Another Location

Complete the following procedure to add a component from another location.

To add a component from another location

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, and drill down on the Name field of the proposal in the Proposals list.
4. Navigate to the Components list by completing the following steps:
   a. In the Proposal Table of Contents explorer, click the arrow icon next to the proposal name folder.
   b. Click the arrow icon next to the Sections folder under the proposal name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
   d. Click the arrow icon next to the Components folder under the section name folder.
5. In the Components list, create a new record, and complete the following steps:
   a. In the Add Sales Tools dialog box, create a new record to display the Components list again.
   b. In the Components list, enter a name and sequence for the file, and then click the select button in the File Name field to display the Add Attachment dialog box.
   c. In the Add Attachment dialog box, attach the file.

Modifying Proposal Component Files

End users can modify a component file if Microsoft Word is installed locally on their computers. End users must have the same application that is used to create the component file.

To modify a proposal component file

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, and drill down on the Name field of the proposal in the Proposals list.
4. Navigate to the Components list by completing the following steps:
   a. In the Proposal Table of Contents explorer, click the arrow icon next to the proposal name folder.
   b. Click the arrow icon next to the Sections folder under the proposal name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
   d. Click the arrow icon next to the Components folder under the section name folder.
5. In the Components list, select the component, and drill down on the File Name field.
6. To edit the file, complete the following steps:
   a. Save the file to your local hard drive.

b. Edit the saved file.
c. In the Components list, delete the value in the File Name field.
d. Click the select button in the File Name field, and attach the modified file.

   The old file is replaced with the modified file.

Printing Proposals (End User)

After generating a proposal, and the Status field s is Completed, end users can print the proposal.

This task is a step in *Process of Generating Proposals (End User)*.

To print a proposal

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, and drill down on the Draft Name field of the proposal in the Proposals list.

   The proposal appears in Microsoft Word.
4. Print the proposal using Microsoft Word.

Locking Proposals (End User)

Use the lock feature to secure the completed proposal and make the proposal read-only. Only the proposal author, the author's manager, that manager's manager, and so on, can modify or unlock the proposal.

This task is a step in *Process of Generating Proposals (End User)*.

To lock a proposal

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the proposal.
3. Navigate to the Proposals view, and select the proposal in the Proposals list.
4. In the proposal record, select the check box in the Locked field.

> **Note:** If the Locked field does not appear, click Menu (the cogwheel icon) in the Proposals list, and then select Columns Displayed to display the field.

Samples of Proposal Templates

Siebel Business Applications come with a sample database. The Proposals view of the Opportunities screen and the Proposals view of the Accounts screen include some sample proposal templates for Microsoft Word.

You can use these sample proposals as a reference when you define a proposal template. The following sample proposals are included in the sample database:

- Standard
- Standard Account
- Strategic
- Quality Strategic Account

The sample templates are included in the following categories:

- Standard: Oppty Ppsl
- Standard Account: Acct Ppsl
- Strategic: Oppty Ppsl
- Opportunity Account Plan: Oppty Ppsl
- Quality Strategic Account: Acct Ppsl

Seed Templates

Customers using the Target Account Selling Module (TAS) can run an Opportunity Plan report in Microsoft Word using the TAS Opportunity Plan template. This proposal template is available in the seed database. For more information about setting up the TAS Opportunity Plan template, see *Siebel Database Upgrade Guide* .

Samples of Proposal Field Mappings

The Proposal Field Mappings view of the Administration - Document screen includes opportunity and account mappings. These mappings list common fields you can use to create a proposal. The following table shows these mappings for the Opportunity business object and business component.

Bookmark	Business Component Field
Company	Account
Address	Street Address
City	City
State	State
ZipCode	Postal Code
Country	Country
Industry	Industry

The following table shows these mappings for the Account business object and business component.

Bookmark	Business Component Field
Company	Account
Address	Street Address
City	City
State	State
ZipCode	Postal Code
Country	Country
Industry	Industry
Account Type	Type

To create a mapping, use the bookmark name in the Microsoft Word document (for example, REF Company). Associate the bookmark with a business component field (for example, Account). Select the mapping for the proposal templates you create.

5 Presentations

Presentations

This chapter includes information about administering and using Siebel Presentations. It includes the following topics:

- *About Siebel Presentations*
- *System Requirements for Siebel Presentations*
- *Process of Creating Presentation Templates*
- *Creating Presentation Template Slides in Microsoft PowerPoint*
- *Creating Records for Presentation Templates*
- *Defining Presentation Template Sections*
- *Adding Components to Presentation Template Sections*
- *Using Conditions in Presentation Templates*
- *Defining Presentation Field Mappings*
- *Associating Field Mappings with Presentation Templates*
- *Creating the Presentation Library*
- *Enabling Users to Display Presentations in HTML Format*
- *About Generating Presentations*
- *Scenario for Generating Presentations*
- *Process of Generating Presentations (End User)*
- *Creating Presentations (End User)*
- *Generating a Presentation Draft (End User)*
- *Modifying and Adding Presentation Content (End User)*
- *Printing Presentations (End User)*
- *Locking Presentations (End User)*
- *Samples of Presentation Templates*

About Siebel Presentations

Siebel Presentations enables sales representatives to create presentations using templates that you create in Microsoft PowerPoint.

Traditionally, sales representatives create presentations by starting with a past presentation and then modifying it for the current prospect. Sales representatives must not only change such basic information as the customer name, but also possibly restructure the presentation so that it fits the new prospect's unique needs. For example, the original presentation might focus on price, but the new presentation might focus on other decision criteria, such as speed or extra functionality.

After the administrator creates the correct templates, the sales representative can click one button to build the correct presentation for a specific account or opportunity. Siebel Presentations uses information that sales representatives enter in the early stages of an opportunity to create the presentation.

Sales representatives can add deal-specific information to the presentation without worrying about formatting or presentation. Using the Presentation Library, sales representatives can find any additional information and automatically insert it into the presentation.

System Requirements for Siebel Presentations

Certain system requirements must be met to use Siebel Presentations. For information about the Documentation Server and other software that is required for Siebel Presentations, see *Document Server*.

System Requirements for the Siebel Web Client

Before you can use Siebel Presentations, you must meet the system requirements for the Siebel Web Client.

To meet the system requirements for the Siebel Web Client:

1. Install on the server, such as a Siebel Server and a Web Server, all of the components that are required to use the Siebel application.
2. Install the Document Server on one or more Windows computers.
3. Install Microsoft Office on the Document Server computer.

Note: If you deploy the Siebel Server in UNIX and want to use Siebel Presentations, a separate Windows computer is required for the Document Server.

Siebel Presentations uses the Document Server. The Document Server is a component of the Siebel Server that lets users on the Web work with Microsoft PowerPoint slides on the server. For more information about installing the components required to use the Siebel application, see *Siebel Installation Guide* .

Before employees or partners can use Siebel Presentations, they must have the following:

- A web browser to use the Siebel application.

  Note: Platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

- (Optional) Microsoft Office to edit presentations.

System Requirements for the Siebel Remote Web Client

Siebel Presentations is available for the Siebel Remote Web Client and the Siebel Web Client. The user interface for Presentations is identical in the Siebel Remote Web Client and the Siebel Web Client.

Siebel Remote Web Client processes requests to generate presentations locally so field sales representatives can generate presentations while traveling. To run Siebel Presentations on the Siebel Remote Web Client, Microsoft Office must be installed on the same computer as the Siebel Remote Web Client.

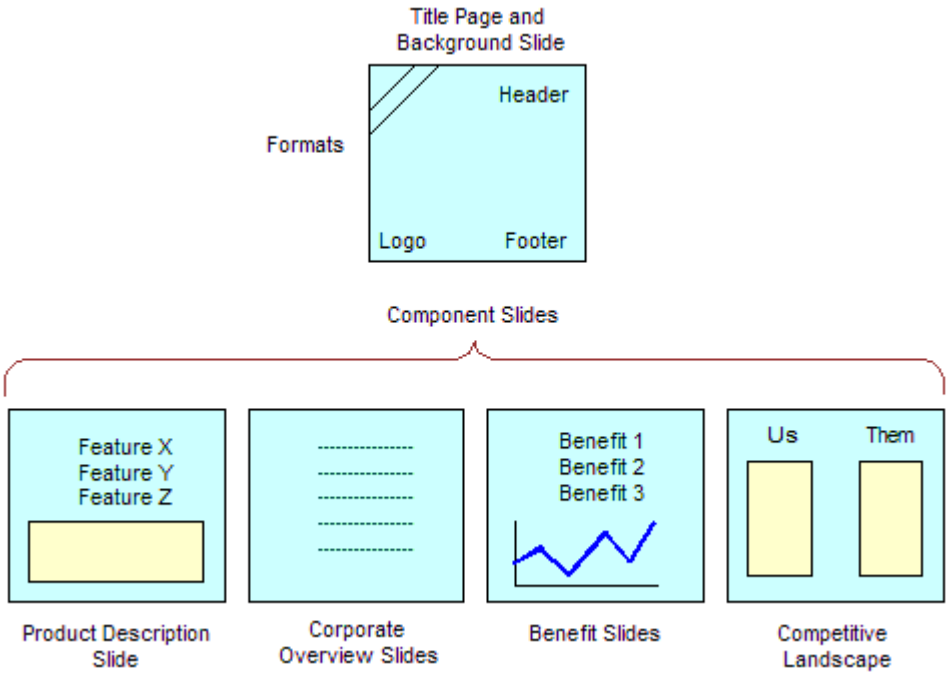
Process of Creating Presentation Templates

To create presentation templates, perform the following tasks:

1. *Creating Presentation Template Slides in Microsoft PowerPoint*. To create the slides for the template, you must write the content and insert bookmarks for such variables as company, contact name, address.
2. *Creating Records for Presentation Templates*. Use the Siebel application to create a single record for the template.
3. *Defining Presentation Template Sections*. Specify the sections the presentation contains.
4. *Adding Components to Presentation Template Sections*. Specify the components each section contains.
5. *Using Conditions in Presentation Templates*. You can add conditions to specify that sections or components are included in the presentation only under certain circumstances.
6. *Defining Presentation Field Mappings*. Specify the Siebel objects that correspond to each bookmark in the Microsoft PowerPoint component slides. You also specify the name of this mapping in the template record.
7. *Associating Field Mappings with Presentation Templates*. Associate the mapping with a template to make it apply to all the components in that template.
8. *Creating the Presentation Library*. Create a separate library of slides that sales representatives can draw upon to customize their presentations. You can perform this optional step at any time.
9. *Enabling Users to Display Presentations in HTML Format*. Update settings on the Document Server to enable end users to view presentations in HTML format.

Creating Presentation Template Slides in Microsoft PowerPoint

The first step for creating presentation templates is to create slides in Microsoft PowerPoint. The following image shows these slides consist of one background slide and multiple component slides (such as Product Description, Corporate Overview, Benefit, and Competitive Landscape).



The component slides in the image are examples. You can use other component slides, such as an agenda, and you can exclude some of these component slides, such corporate overview. However, a template must have a background slide and one or more component slides.

> **Note:** Platform, database, and other certifications for Siebel are found on My Oracle Support. For help searching for certifications, see *How to Check the Certification Matrix in the New My Oracle Support Site* (KB871388).

Presentations can use fields from only one business object. If you want to include additional fields, you must use Siebel Tools to add the business components that include these fields to the business object that is the basis of the presentation.

This task is a step in *Process of Creating Presentation Templates*.

Planning Presentation Templates

Before you create the slides in Microsoft PowerPoint, you must determine the format of the presentation and the information to include in the presentation.

Begin by reviewing previous successful presentations to see the sections they contain. For example, do they all contain an agenda, an executive overview, and a product summary? Also, review the current slides you have on hand, and note the customer questions these slides answer. Then determine how to organize the information. What topics are standard across all presentations? What topics are specific to certain presentations? What is the best order for the parts of the presentation? Finally, determine the fields to insert to customize the presentation (for example, contact name, account name, and industry). You use this information to create bookmarks in the Microsoft PowerPoint slides.

Creating a Background Slide

After you plan a template, you can create the presentation background slide for the template. This Microsoft PowerPoint slide serves as the title slide and also defines the layout and formatting of the entire presentation. This background slide can contain a company logo, special colors, background designs, headers, and footers.

To create a background slide

1. Create a new slide in Microsoft PowerPoint.
2. Because this slide also serves as the title slide, select the title slide layout template, and enter the title of the presentation.
3. Set up headers, footers, fonts, background colors, and other layout options for the template.

   For more information about completing these tasks, see the online help for Microsoft PowerPoint.
4. Save and close the file.

   Choose a name that uses only alphanumeric characters, and use the PPT file extension for Microsoft PowerPoint.

Creating Component Slides for Presentation Templates

After you create the background slide for the template, you can create the component slides. A component slide is a Microsoft PowerPoint slide that includes standard text, pictures, bulleted information, and personalized data.

To create a component slide, you enter the standard text in a Microsoft PowerPoint presentation and then create *bookmarks*, or Microsoft PowerPoint placeholders for custom data. When a sales representative generates a presentation, these bookmarks are replaced with data from the Siebel application.

To create a component slide with bookmarks in Microsoft PowerPoint

1. Create a new slide in Microsoft PowerPoint.
2. Enter the standard text, pictures, bulleted information, and so on for the component slide.
3. Add bookmarks to the locations in the component slide to which you want to insert Siebel field data by completing the following steps:
   a. Place the cursor where you want to create a bookmark.
   b. Enter the following text:

      ```
      [["name of bookmark"]]
      ```

      For example, to create a bookmark for the company name, enter the following text:

      ```
      [[Company]]
      ```
4. Note the names of the bookmarks because you need these names when you map the bookmarks to Siebel field names.

   For more information, see *Defining Presentation Field Mappings*.
5. Save the component slide as a PPT file.

Creating Records for Presentation Templates

After you create the template slides in Microsoft PowerPoint, you can use Siebel Presentations to create a record for the presentation template.

This task is a step in *Process of Creating Presentation Templates*.

To create a record for a presentation template

1. Navigate to the Administration - Document screen, then the Presentation Templates view.
2. In the Templates list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	Type a name for the template.
Default	Select the check box to indicate this template is the default presentation template. When a user clicks Auto Presentation, Siebel Presentations uses the default template if there are no decision issues that match the theme of a presentation. You can select only one Opportunity Presentation default and one Account Presentation default.
Category	Select one of the following types of templates: o **Opportunity Presentation.** These templates are available only when you are working with Opportunities. o **Account Presentation.** These templates are available only when you are working with Accounts.
Mapping Name	Leave this field blank until you create a mapping. Then select the mapping name that indicates the group of bookmark fields to use with this template.
Template File Name	Select the Microsoft PowerPoint template slide to attach the slide to the template. (This slide is the background slide.)
Theme	Select a theme if you want to associate the template with a decision issue. When you assign the presentation template a theme, you associate it with a decision issue that is important for the opportunity. When a presentation theme matches the number one decision issue for the current opportunity, Siebel Presentations automatically selects the correct template when the user clicks Auto Presentation. Users can also select a theme template. Because accounts do not relate to decision issues, the Theme field is not applicable for Account Presentation templates. It applies only to Opportunity Presentation templates.

Field	Comments
Description	Type a description of the template.
Language	Select the language in which the template is written.
Locale	Select the locale. Only the templates specific to this locale appear.

Defining Presentation Template Sections

After you create the Microsoft PowerPoint slides and a record for the template, define the structure of the presentation template. A presentation is made up of sections that divide and subdivide the presentation. A single section might contain multiple components or a single component.

The type of a section depends on the nature of the data it contains. For example, file sections contain slides, chart sections reference Siebel charts, and so on.

You define the structure of the presentation template by creating sections in the Presentation Templates view of the Administration - Document screen. Sections are associated with the Template record you create for the template. You must create high-level sections. Optionally, you can add subsections to these sections. The presentation structure can include multiple levels of sections because a subsection can contain other subsections.

This task is a step in *Process of Creating Presentation Templates*.

Creating High-Level Sections for Presentation Templates

You must create High-level sections to insert into presentation templates.

To create a high-level section

1. Navigate to the Administration - Document screen, then the Presentation Templates view.
2. Navigate to the Sections list by completing the following steps:
   a. In the Template explorer, click the arrow icon next to the template name folder.
   b. Click the arrow icon next to the Sections folder under the template name folder.
3. In the Sections list, create a new record, and complete the fields described in the following table.

Field	Comments
Name	Type the name of the section. The section name is the title of the slide for some section types, such as Bullet Slide.
Sequence	Type a number to indicate the order in which the section appears in the presentation.

4. In the Section Type field, select the type of section.

   The available section types are described in the following table.

Type	Comments
Bullet Slide	Creates a slide and inserts a list of Siebel data in bullet format. This section name is used as the slide title.
Chart	Creates a slide and inserts a Siebel chart. The chart is automatically centered, and you can change x, y, and z axes in the chart.
File	Inserts the content of files in PPT, DOC, or TXT format if you use Microsoft PowerPoint. For text, creates a slide and inserts the text.
Locator	Inserts slides or text (PPT slides or TXT files) from the Siebel Encyclopedia. The Add Sales Tools dialog box displays the content in the Siebel Encyclopedia. For more information, see *Adding Components to Presentation Template Sections*. For example, Siebel Presentations can dynamically insert slides from the Siebel Encyclopedia that relate to the products of interest for an opportunity. If you want the to dynamically insert slides related to the products for the opportunity, use a locator section type. The file types must be PPT, TXT, or RTF. If more than one slide meets the locator criteria you specify, Siebel Presentations inserts each slide.
Organization Chart	Creates a slide and inserts organization charts for the account or opportunity associated with the template. Charts are automatically centered in the presentation.
Table	Creates a slide and inserts Siebel application data into a table format. You select fields to include, the sequence of the fields, and the column lengths. Tables are automatically centered in the presentation. For a table section type, you can also create a related table section. For more information, see *Adding Related Table Subsections to Presentation Templates*.
Two-Column Slide	Creates a slide that inserts two subsections next to each other. For example, you can show a list of key product features (a Bullet Slide section) next to a picture of the product (a File section). The two subsections can be any of the other section types. For this section type, you create two subsections under the section. For each subsection, complete the fields appropriate for that type of section. For example, if you want to show a Chart section next to a Table section, create a subsection of the Chart section type (and complete the Chart-related fields) and create a subsection of the Table type (and complete the Table-related fields).

5. Complete the fields applicable to the section type.

   For the Bullet Slide section type, complete the field described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Presentation Templates*.
Business Object	Select the Siebel business object from which the bullet slide information is taken. The Business Objects dialog box shows all available Siebel business objects. For example, to include a bullet list of products with the quantity and ship date for an opportunity, select Opportunity.

   For the Chart section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Presentation Templates*.
Business Object	Select the Siebel business object from which the chart information is taken. The Business Object list shows all available Siebel business objects. For example, select Opportunity.
Chart or Table Name	Select the name of the chart applet. For example, select Opportunity Chart Applet - Current Opportunity Analysis. To display records from a multi-value group (MVG), select a list applet, not an MVG applet. If the list applet that you want is not available, use Siebel Tools to create the list applet for the child business component in the MVG. You do not need to associate this new list applet with a view.
Search Spec	Type the search criteria to use to restrict data for the chart. For example, if you want to include revenue greater then $500,000, type Revenue > 500000.
Category	Type the option to use for the X-axis in charts that provide multiple X-axis options. For example, in the Lead Analysis by Rep chart, type Sales Representative or Quality.
Function	Type the option to use for the Y-axis in charts that provide multiple Y-axis options. For example, in the Lead Analysis by Rep chart, type Number of Opportunities, Opportunity Revenue, or Average Opportunity Revenue.
Series	Type the option to use for the Z-axis in charts that provide multiple Z-axis options.

Field	Comments

For the File section type, complete the field described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Presentation Templates*.

For the Locator section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Presentation Templates*.
Information Retrieval Method	Select the relationship to use to find the literature. For example, select Oppty Competitor Literature for the literature about competitors associated with an opportunity. To associate literature with a product, competitor, or partner, use the Literature view of the Administration - Document screen (or the Decision Issues, Competitors, and Administration - Product screens). For more information, see *Siebel Applications Administration Guide* .
Retrieved Literature Category	Select the type of literature (for example, brochures or specification sheets) to filter the slides from the Siebel Encyclopedia that you want to include in the presentation.

For the Organization Chart section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Presentation Templates*.
Business Object	Select the Siebel business object from which the organization chart information is taken. The Business Objects dialog box shows all available business objects.
Chart or Table Name	Select the name of the applet that contains the organization chart data. For example, select Opportunity Organization Analysis Applet.

Field	Comments

For the Table section type, complete the fields described in the following table.

Field	Comments
Condition	Type the condition, if any, to apply to the section. For information about conditions, see *Using Conditions in Presentation Templates*.
Business Object	Select the Siebel business object from which the table information is taken. The Business Objects dialog box shows all available business objects. For example, if you want to include a table of products with the quantity and ship date for an opportunity, select Opportunity.
Chart or Table Name	Select the name of the applet that contains the table data. For example, if you want to include the products in an opportunity, select Opportunity Product Applet.
Table Fields	Click the select button to open the Table Fields dialog box. For each table field, add a new record, and complete the following fields for the record: o **Field Name.** Type the field name of the field. For example, type Product. o **Sequence.** Type the sequence in which you want the field to appear in the table. o **Width.** Type the width of the field column in the table. Column width is measured in pixels. The default (and minimum) width is 100 pixels. You can also define column width by a percentage of the table width. When you enter a value for table width, column width equates to a percentage of total table width. For example, if there are three fields in a table, and the table width is 100, field widths of 25, 65, and 35 equate to 25%, 65%, and 35% of the total table width. If the table width is blank, the field widths equate to 25, 65, and 35 pixels. o **Alignment.** Select the alignment of the data in the field. For example, select Left, Center, or Right.

Adding Subsections to Presentation Templates

After adding high-level sections, you can add subsections to them.

To add subsections to an existing section

1. Navigate to the Administration - Document screen, then the Presentation Templates view.
2. Navigate to the Sections list for subsections by completing the following steps:
   a. In the Template explorer, click the arrow icon next to the template name folder.
   b. Click the arrow icon next to the Sections folder under the template name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
   d. Click the arrow icon next to the Sections folder under the section name folder.

3. In the Sections list, add subsections in the same way that you add high-level sections.
   For more information, see *Creating High-Level Sections for Presentation Templates*.

   Note: When a presentation is generated, a section is generated before any of its subsections and appears before subsections in the finished presentation.

Adding Related Table Subsections to Presentation Templates

After adding a Table Name subsection, you can add related tables that provide detailed information for the table. For example, if the tables subsection contains a quote record, the related table can contain the quote line items. The relationship between the information is essentially a parent-child-grandchild relationship; the opportunity is the parent, the quote table is the child, and the related table containing the quote line items is the grandchild.

To add a related table subsection

1. Navigate to the Administration - Document screen, then the Presentation Templates view.
2. Navigate to the Sections list by completing the following steps:
   a. In the Templates explorer, click the arrow icon next to the template name folder.
   b. Click the arrow icon next to the Sections folder. under the template name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
3. In the Sections list, make sure that the Section Type field for the selected section has a value of Table and that the Chart or Table Name field for the selected section has a table name.
4. In the Templates explorer, click the arrow icon next to the Related Table folder under the section name folder.

   Note: The Related Table folder in the Template explorer applies to only the Table section type. You can add related tables only for the Table section type.

5. In the Related Table form, create a new record, and complete the fields described in the following table.

Field	Comments
Business Object	Select the Siebel object to which this table is related.
Table Name	Select the name of the related table applet.
Field Name	Select the fields to appear in the table. If you select no fields, all fields appear.

Adding Components to Presentation Template Sections

After you define the structure of the presentation, you must specify the location of the component slides that make up the bulk of the presentation.

For sections that extract data from a Siebel database (such as a Chart section), you specify all the information necessary to generate the appropriate contents. However, the component slides that you create earlier in Microsoft PowerPoint are not part of the presentation until you add them to the appropriate sections.

> **Note:** You can add components to any section type (not just a File section type), and a section can contain multiple components.

Component files can be PPT or DOC, TXT, or RTF files. When they are not PPT files, Siebel Presentations creates a slide (with the template background), and imports the text into the slide. Microsoft PowerPoint inserts the TXT and DOC files according to how you format the documents. For example, Microsoft PowerPoint inserts TXT or DOC paragraphs in the slide as paragraphs, but if the file contains TXT or DOC indented or bulleted paragraphs, Microsoft PowerPoint attempts to create a slide for each bullet point, or one slide for all bullet points, depending on the formatting and line breaks (carriage returns) in the document.

To make sure that TXT or DOC files are inserted correctly in the Microsoft PowerPoint presentation, open the text or Microsoft PowerPoint file in Microsoft PowerPoint and verify that the format is correct. The format you see when you open the file in Microsoft PowerPoint is the same format used in the presentation.

This task is a step in *Process of Creating Presentation Templates*.

To add a component to a presentation template section

1. Navigate to the Administration - Document screen, then the Presentation Templates view.
2. Navigate to the Components list by completing the following steps:
    a. In the Templates explorer, click the arrow icon next to the template name folder.
    b. Click the arrow icon next to the Sections folder under the template name folder.
    c. Click the arrow icon next to the section name folder under the Sections folder.
    d. Click the arrow icon next to the Components folder under the section name folder.
3. In the Components list, create a new record.
4. In the Add Sales Tools dialog box, select the component you want to add, and click Add.
5. If the component does not appear in the Add Sales Tools dialog box, create a new record in the dialog box, and complete the fields described in the following table.

Field	Comments
Name	Type a name for the component.
Sequence	Type a number to indicate the order in which the component appears in the section.
Attachment Name	Select the file for the component.
Condition	Type a condition. The component appears only when the condition is TRUE.

Using Conditions in Presentation Templates

You can add query conditions to a section or a component to specify the conditions under which the section or component is used in the presentation. For example, if you have an executive summary for deals of over $100,000 and another executive summary for smaller deals, you can use the condition field in each Executive Summary section to enable Siebel Presentations to insert the appropriate executive summary when the appropriate conditions are TRUE.

This task is a step in *Process of Creating Presentation Templates*.

Entering Criteria

You can enter query criteria (such as [Revenue] > 100000) in the Condition field of a section or component record. If the condition is TRUE, the section or component is included in the presentation. If the condition is FALSE, the section or component is not included. If you do not specify a condition, the section or component is always included.

You can create conditions for any field that relates to the business object of the presentation; use Opportunity fields for opportunity presentations, and Account fields for account presentations. If the definition of a condition must be based on fields from another business object, then you must add those fields to the Opportunity or Account business object through either a link or a join.

The syntax for conditions is similar to the syntax for Siebel queries. For more information about the syntax of Siebel queries, see *Siebel Fundamentals* and *Siebel Developer's Reference* .

Examples of Criteria

The following examples illustrate the syntax for conditions:

- If the opportunity is for a Pentium computer, you want to insert a component about the advantages of the Pentium chip. In the Condition field for this component, enter the following condition:

  ```
  EXISTS ([Product] LIKE "Pentium*")
  ```

  This condition reviews the products for the opportunity. If the product name begins with Pentium, Siebel Presentations inserts the component. Otherwise, Siebel Presentations leaves out the component.

  > **Note:** To use a product in a condition, the product must be entered in the Products view of the Opportunities screen. The condition does not apply to products that were are as quote line items.

- If the account is located in Georgia, you want to enter a section with terms and conditions limited to that state. In the Condition field of the section, enter the following:

  ```
  EXISTS ([State] = "GA")
  ```

  or

  ```
  [State] = "GA"
  ```

  Use the first line if the account is located only in Georgia, and the second line if the account is located in Georgia and another location.

  This condition reviews the state for the account, and if the state is Georgia, then Siebel Presentations includes the section in the presentation. Otherwise, Siebel Presentations skips this section and moves on to the next section.

- If the opportunity has a revenue amount greater than $1,000,000 and it is expected to close in 2003, insert a component on a special program for this type of customer. Enter the following condition in the Condition field for the component:

  ```
  [Revenue] > 1000000 AND [Close Date] <= ("12/31/2003") AND [Close Date] >= ("1/1/2003")
  ```

  After you enter a condition, test it as a query on the view to use it in. For example, you can text this condition as a query on the My Opportunities view. If the query returns the data you expect, the query is probably in the correct format for the Condition field.

Defining Presentation Field Mappings

When you create the component slides of the presentation, you probably include bookmarks for personalized fields. You must map the bookmarks in the component slides to Siebel fields.

This mapping designates the Siebel field to use for substituting data for a bookmark in the component slide. For example, by mapping the Company bookmark to the Account field, each Company bookmark is replaced with the value of the Account field.

You cannot map fields to a bookmark in the header or footer of the template unless that bookmark is also somewhere else in the content of the template, other than in the footer or header.

Because you might work with multiple presentation templates, you can have multiple sets of bookmarks. You can use one mapping for one presentation template and another mapping for another presentation, or you can use a single mapping for several presentation templates. In either case, you must specify a mapping name in the template record to associate the template with a specific mapping.

If you map a bookmark to a multi-value field, the primary record of the group is retrieved. If you want to retrieve multiple values from a multi-value field, you can add a Table section type to the presentation template. This section type retrieves multiple values from the multi-value field in table format.

This task is a step in *Process of Creating Presentation Templates*.

Creating Field Mappings for Presentations

To create a field mapping, create a record for the mapping, and then map the fields.

Note: For Siebel Tools objects to be accessible in the Siebel application, the Siebel repository must be updated in the appropriate database.

To create a field mapping for presentations

1. Navigate to the Administration - Document screen, then the Presentation Field Mappings view.
2. In the Business Objects list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Mapping Name	Type a name for the mapping.
Business Object	Select the business object that contains fields in the presentation. For example, to create an opportunity presentation, select the Opportunity business object.
Description	Type a description of the mapping.

3. Navigate to the Business Components list by completing the following steps:
   a. In the Business Objects explorer, click the arrow icon next to the business object name folder.
   b. Click the arrow icon next to the Business Components folder under the business object name folder.
4. In the Business Components list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Business Component	Select the business component. The business component must be related to the business object.
Search Specification	Type the search specification. The search specification limits the records returned for the business component. If you do not designate a search specification, all records for the business component are returned.

Note: You can associate more than one business component mapping with an object. For example, to create an opportunity presentation, you select the Opportunity business component. You can also select the TAS Account business component to create mappings for views under the Opportunity TAS view.

Mapping the Fields for Presentations

After you create a record for the mapping, you can map the fields.

To map the fields for presentations

1. Navigate to the Administration - Document screen, then the Presentations Field Mappings view.
2. Navigate to the Business Component Fields list by completing the following steps:
    a. In the Business Objects explorer, click the arrow icon next to the business object name folder.
    b. Click the arrow icon next to this Business Components folder under the business object name folder.
    c. Click the arrow icon next to the business component name folder under the Business Components folder.
    d. Click the arrow icon next to the Business Component Fields folder under the business component name folder.
3. In the Business Component Fields list, create a new record for each field to map, and complete the necessary fields.

Associating Field Mappings with Presentation Templates

After you create a mapping, you must associate it with a template so that it applies to all the components in that template. You can associate a mapping with one or more templates.

This task is a step in *Process of Creating Presentation Templates*.

To associate a field mapping with a presentation template

1. Navigate to the Administration - Document screen, then the Presentation Templates view.
2. In the Templates list, select the record for the template with which you want to associate the mapping.
3. In the Mapping Name field, select the mapping.

Creating the Presentation Library

Administrators create and maintain a Presentation Library that consists of slides that sales representatives can add to the presentations.

Slides in the Presentation Library are different from the other component slides you create. Component slides are part of the presentation template, and are automatically included in presentations generated from that template. Slides in the Presentation Library are available to sales representatives as needed. Administrators can also recommend Presentation Library slides to include in the templates.

After sales representatives create a default presentation automatically, they can add more slides from the Presentation Library or use the Edit Layout button to customize the presentation. The Presentation Library enables multiple presentations created from the same template to have different content.

Administrators add the various components to the Presentation Library and maintain the information. When the sales representatives need additional slides to add to a presentation, they review the Presentation Library, select the component they want to insert, and automatically insert it into the presentation.

The sales force cannot update the information in the Presentation Library. The only sections and components available to sales representatives are those you provide for them.

This task is a step in *Process of Creating Presentation Templates*.

Creating Presentation Files for the Presentation Library

You create presentation files for the Presentation Library in the same way that you create the presentation templates. Use Microsoft PowerPoint to enter text, graphics, and bookmarks, and then map these bookmarks to fields in your Siebel database.

> **Note:** You can include only the File section type in the Presentation Library. Include other section types only in the initial template. For more information see *Defining Presentation Template Sections*.

Adding Sections to the Presentation Library

Sections organize slides in the Presentation Library. For example, if some of the slides in the Presentation Library are marketing slides and others are technical slides, you can create a section for each of these slide types. Users can browse through the marketing slides and the technical slides separately. You must add at least one section to the Presentation Library. For more information about adding sections, see *Defining Presentation Template Sections*.

To add sections to the Presentation Library

1. Navigate to the Administration - Document screen, then the Presentation Library view.
2. Navigate to the Sections list of the Presentation Library by completing the following steps:
    a. In the Library explorer, click the arrow icon next to the Library folder if that folder is not already open.
    b. Click the arrow icon next to the Presentation Library folder under the Library folder.
    c. Click the arrow icon next to the Sections folder under the Presentation Library folder.
3. In the Sections list, add sections in the same way that you add sections to a presentation.

Adding Components to the Presentation Library

After adding sections to the Presentation Library, you add components to the sections. For more information about adding components, see *Adding Components to Presentation Template Sections*.

To add components to the Presentation Library

1. Navigate to the Administration - Document screen, then the Presentation Library view.

2. Navigate to the Components list of the Presentation Library by completing the following steps:
    a. In the Library explorer, click the arrow icon next to the Library folder if that folder is not already open.
    b. Click the arrow icon next to the Presentation Library folder under the Library folder.
    c. Click the arrow icon next to the Sections folder under the Presentation Library folder.
    d. Click the arrow icon next to the section name folder under the Sections folder.
    e. Click the arrow icon next to the Components folder under the section name folder.
3. In the Components list, add the components in the same way that you add components to a presentation.

Recommending Content for Presentations

Administrators can simplify the process of creating a presentation by associating recommended content with the presentation template.

To recommend content for a presentation

1. Navigate to the Administration - Document screen, then the Presentation Library view.
2. Navigate to the Components list of the Presentation Library by completing the following steps:
    a. In the Library explorer, click the arrow icon next to the Library folder if that folder is not already open.
    b. Click the arrow icon next to the Presentation Library folder under the Library folder.
    c. Click the arrow icon next to the Sections folder under the Presentation Library folder.
    d. Click the arrow icon next to the section name folder under the Sections folder.
    e. Click the arrow icon next to the Components folder under the section name folder.
3. In the Components list, select the component, and click the select button in the Recommended Template field.
4. In the Presentation Templates dialog box, select the template for which to recommend the component.

    You can recommend a component for multiple templates. For example, you might recommend a legal clause for all templates. Recommended content appears when a user edits a presentation using the Edit Layout button, and the Show Recommended Only box is selected.

Enabling Users to Display Presentations in HTML Format

By default, presentations are saved only in a document format, not in HTML format. The View HTML button is unavailable, and the user cannot view the presentations in HTML format. To enable users to display presentations in HTML format, you must edit the DocumentServerViewHTML parameter to a value TRUE instead of FALSE.

Note: Users of the Siebel Remote Web Client cannot view presentations in HTML format.

This task is a step in *Process of Creating Presentation Templates*.

To enable users to display presentations in HTML format

1. Start the Server Manager.

2. Enter the following command:

```
srvrmgr> change param DocumentServerViewHTML=True for comp DocServer
```

> **Note:** You can also change parameters in the Administration - Server Configuration screen. For more information, see *Siebel System Administration Guide* .

About Generating Presentations

Using presentation templates that the administrator creates, sales representatives can create, modify, and print presentations for an opportunity by using the Presentations view of the Opportunities screen.

A presentation uses the details you record about an account or opportunity and combines the details with a predefined template to create a presentation tailored to the customer needs. The template defines the initial formatting and structure of the presentation, and can include predefined components, such as text, tables, and diagrams that address specific issues. You can also set up a template to include files from the Presentation Library.

After generating a presentation, you can modify it to meet customer needs by changing the order of slides and adding slides from the Presentation Library. When the presentation is complete, you can print it.

Scenario for Generating Presentations

This topic gives one example of how a sales representative might generate presentations for prospective accounts. You might generate presentations differently, depending on your business model.

A prospective customer asks a sales representative to deliver a presentation about service offerings. The sales representative already recorded the opportunity and its related details in Siebel Sales, including the number one decision issue (price).

The sales representative navigates to the Presentations view of the Opportunity screen, and creates a new presentation record. Because price is the most important decision issue, the presentation uses a template that includes slides that address price issues.

When the sales representative generates a draft of the presentation, the presentation is formatted according to company standards, and includes the relevant slides. The sales representative makes some minor adjustments to the presentation, and saves it.

Process of Generating Presentations (End User)

To generate presentations, perform the following tasks:

1. *Creating Presentations (End User)*
2. *Generating a Presentation Draft (End User)*
3. *Modifying and Adding Presentation Content (End User)*
4. *Printing Presentations (End User)*

5. *Locking Presentations (End User)*

Creating Presentations (End User)

Before end users can generate a draft of the presentation, they must create a presentation and associate the presentation with an opportunity or account. The following procedure explains how to create a presentation using the Opportunities screen. You can also use the Accounts screen.

This task is a step in *Process of Generating Presentations (End User)*.

To create a presentation

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record.
3. Navigate to the Presentations view, and click Auto Presentation.

   A presentation is automatically generated using the default template or the template for the decision issue associated with the opportunity.

   > **Note:** To generate a presentation using a different template, select a different template in the Template field of the presentation record.

Generating a Presentation Draft (End User)

After creating a presentation, end users can generate a presentation draft. The draft is a presentation that end users can edit if Microsoft PowerPoint is installed on their computers. If Microsoft PowerPoint is not installed, end users can view the presentation, and they can add sections and change the order of sections, but they cannot edit slides.

End users creating a presentation in a Siebel Web Client environment (network connection), can follow all of the steps in the procedure in this topic. End users creating a presentation in a Siebel Mobile Web Client environment (remote), and who have the Siebel Mobile Web Client installed locally, can omit the final step in this procedure.

This task is a step in *Process of Generating Presentations (End User)*.

To generate a presentation draft

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, select the presentation in the Presentations list, and click Generate Draft.

   The Status field changes to a value of In Queue, and a draft of the presentation is created if you are working in a Siebel Mobile Web Client environment (remote).
4. Click Update to generate a presentation draft from the server if you are working in a Siebel Web Client environment.

   The status of the presentation refreshes. Status field values include In Progress, Generating, Completed, and Failed.

Modifying and Adding Presentation Content (End User)

After creating and reviewing a draft of a presentation, end users can change the content in the presentation.

This task is a step in *Process of Generating Presentations (End User)*.

Viewing the Structure of Presentations

End users can view the structure of a presentation in the Presentation Table of Contents explorer. In this explorer, they can view the hierarchy of sections and components included in a presentation.

Sections are the main points of the presentation. Sections can contain subsections and components. Components are the slides in the presentation. In some cases, you can set up sections to generate slides.

To view the structure of a presentation

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, select the presentation in the Presentations list, and drill down on the Name field.
4. In the Presentation Table of Contents explorer, click the arrow icon next to the presentation name folder to show it contents.
5. Click the arrow icon next to each folder in the presentation to show more content.

Adding Sections for Presentation Library Components

If an administrator creates optional slides in the Presentation Library, end users can customize the presentation by adding these slides. The Edit Layout button enables end users to add slides in the Presentation Library to a presentation. Complete the procedure in this topic to add new sections to a presentation. These new sections contain components in the Presentation Library.

To add sections for Presentation Library components

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, select the presentation in the Presentations list, and click Edit Layout.
4. To display more components in the Content Library list of the Template Layout dialog box, clear the Show Recommended Only check box.

   > **Note:** If the Show Recommended Only check box is selected, only those components the administrator recommends appear in the Content Library list. If this check box is cleared, all available components appear in the Content Library list. For more information about recommend content, see *Creating the Presentation Library*.

5. In the Template Layout dialog box, move components from the Content Library pane list the Table of Contents list, and click Save.
   If you make a mistake, click Reset Layout to undo all changes to the Table of Contents list.

6. To see the new content in the presentation, complete the following steps:
    a. In the Presentations list, drill down on the Name field of the presentation.
    b. In the Presentation Table of Contents explorer, click the arrow icon next to the presentation name folder.
    c. Click the arrow icon next to the Sections folder under the presentation name folder.

    The new sections appear under the Sections folder.

Changing the Order of Sections in Presentations

When end users add a section to a presentation, the section sequence numbers are not automatically regenerated. If you insert a section in a presentation, you must modify each sequence number for the presentation. The sequence numbers in the Presentations list determine the order in which sections appear in the presentation.

You can use the Edit Layout button and the Presentation Table of Content explorer to re-sequence presentation sections.

Changing the Order of Presentation Sections Using Edit Layout Button

Complete the following procedure to use the Edit Layout button to re-sequence presentation sections.

To change the order of presentation sections using Edit Layout button

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, select the presentation in the Presentations list, and click Edit Layout.
4. In the Template Layout dialog box, change the order of the sections or remove sections, and click Save.

> **Note:** The Show Recommended Only check box is automatically selected in the Template Layout dialog box only if the Content Library list contains recommended components. Otherwise, the check box is cleared.

Changing the Order of Presentation Sections Using Presentation Table of Contents Explorer

Complete the following procedure to use the Presentation Table of Contents explorer to re-sequence presentation sections.

To change the order of presentation sections using Presentation Table of Contents explorer

1. Navigate to Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, and drill down on the Name field of the presentation in the Presentations list.
4. Navigate to the Sections list by completing the following steps:
    a. In the Presentation Table of Contents explorer, click the arrow icon next to the presentation name folder.
    b. Click the arrow icon next to the Sections folder under the presentation name folder.
5. In the Sections list, change the number in the Sequence field for each section.
6. If you want to a remove section from a presentation, select the section, and delete it.

Adding Components to Presentations

Components are the slides that you can add to a presentation. End users can add components to sections from the Presentation Library, from the Siebel Encyclopedia, and from another location, such as a local hard drive. You can add more than one component to a section.

The Presentation Library includes a hierarchical structure that administrators can use when designing literature components to associate with a presentation. Using the Presentation Library, end users can navigate to a section or subsection, and then select the component file associated with the section.

Adding Components from the Presentation Library

Complete the following procedure to add a component from the Presentation Library.

To add a component from the Presentation Library

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, and drill down on the Name field of the presentation in the Presentations list.
4. Navigate to the Sections list by completing the following steps:
    a. In the Presentations Table of Contents explorer, click the arrow icon next to the presentation name folder.
    b. Click the arrow icon next to the Sections folder under the proposal name folder.
    c. Click the arrow icon next to the section name folder under the Sections folder.
5. In the Sections list, click Library.
6. Navigate to the Components list of the Presentation Library by completing the following steps:
    a. In the Library explorer, click the arrow icon next to the Presentation Library folder.
    b. Click the arrow icon next to the Sections folder under the Presentation Library folder.
    c. Click the arrow icon next to the section name folder under the Sections folder.
    d. Click the arrow icon next to the Components folder under the section name folder.
7. In the Components list, select the component to add, and then Add Components.
   The component file is added to the Components folder for the section you selected in Step 4 of this procedure.

Adding Components from the Siebel Encyclopedia

Complete the following procedure to add a component from the Siebel Encyclopedia.

To add a component from the Siebel Encyclopedia

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, and drill down on the Name field of the presentation in the Presentations list.
4. Navigate to the Components list by completing the following steps:
    a. In the Presentation Table of Contents explorer, click the arrow icon next to the presentation name folder.
    b. Click the arrow icon next to the Sections folder under the presentation name folder.
    c. Click the arrow icon next to the section name folder under the Sections folder.

   d. Click the arrow icon next to the Components folder under the section name folder.
5. In the Components list, create a new record.
6. In the Add Sales Tools dialog box, select a component you want to add, and click Add.

   Note: You can add only PPT files as components directly into a template section.

Adding Components from Another Location

Complete the following procedure to add a component from another location.

To add a component from another location

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, and drill down on the Name field of the presentation in the Presentations list.
4. Navigate to the Components list by completing the following steps:
   a. In the Presentation Table of Contents explorer, click the arrow icon next to the presentation name folder.
   b. Click the arrow icon next to the Sections folder under the presentation name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
   d. Click the arrow icon next to the Components folder under the section name folder.
5. In the Components list, create a new record, and complete the following steps:
   a. In the Add Sales Tools dialog box, create a new record to display the Components list again.
   b. In the Components list, enter a name and sequence for the file, and then click the select button in the File Name field to display the Add Attachment dialog box.
   c. In the Add Attachment dialog box, attach the file.

Modifying Presentation Component Files

End users can modify a component file if Microsoft PowerPoint is installed locally on their computers. End users must have the same application that was used to create the component file.

To modify a presentation component file

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, and drill down on the Name field of the presentation in the Presentations list.
4. Navigate to the Components list by completing the following steps:
   a. In the Presentation Table of Contents explorer, click the arrow icon next to the presentation name folder.
   b. Click the arrow icon next to the Sections folder under the presentation name folder.
   c. Click the arrow icon next to the section name folder under the Sections folder.
   d. Click the arrow icon next to the Components folder under the section name folder.
5. In the Components list, select the component, and drill down on the File Name field.
6. To edit the file, complete the following steps:
   a. Save the file to your local hard drive.

b. Edit the saved file.
c. In the Components list, delete the value in the File Name field.
d. Click the select button in the File Name field, and attach the modified file.

   The old file is replaced with the modified file.

Printing Presentations (End User)

After generating a presentation, and the Status field is Completed, end users can print the presentation.

This task is a step in *Process of Generating Presentations (End User)*.

To print a presentation

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, and drill down on the Draft Name field of the presentation in the Presentations list.

   The presentation appears in the application in which it was created.
4. Print the presentation using the application in which it was created.

Locking Presentations (End User)

Use the lock feature to secure the completed presentation and make the presentation read-only. Only the presentation author, the author's manager, that manager's manager, and so on, can modify or unlock the presentation.

This task is a step in *Process of Generating Presentations (End User)*.

To lock a presentation

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. Drill down on the Opportunity Name field for the opportunity record associated with the presentation.
3. Navigate to the Presentations view, and select the presentation in the Presentations list.
4. In the presentation record, select the check box in the Locked field.

> **Note:** If the Locked field does not appear, click Menu (the cogwheel icon) in the Presentations list, and then select Columns Displayed to display the field.

Samples of Presentation Templates

Siebel Business Applications come with a sample database. The Presentation Templates view of the Administration - Document screen includes some sample presentation templates.

You can use these sample presentations as a reference when you define a presentation template. The following sample presentations are included in the sample database:

- Corporate Presentation (Opportunity category)
- Corporate Presentation - Account (Account category)

6 Fulfillment Centers

Fulfillment Centers

This chapter includes information about setting up and using fulfillment centers to print and distribute documents generated through Siebel Correspondence. It includes the following topics:

- *About Fulfillment Centers*
- *Process of Setting Up and Using Fulfillment Centers*
- *Adding Fulfillment Center Records*
- *Providing Fulfillment Center Access to Siebel Correspondence*
- *Sending Correspondence to Fulfillment Centers*
- *Monitoring Fulfillment Requests*
- *Recalling Submitted Correspondence*

About Fulfillment Centers

After users complete correspondence and want to send it to the recipient, they can print and mail the letter themselves, or they can direct their correspondence to a fulfillment center that prints and mails it for them. A fulfillment center might be a division of a company, such as a marketing department.

You might want to use a fulfillment center for the following reasons:

- To enable users to produce correspondence in any location where they can access the Web, even if they do not have access to a printer.
- To save users time. They do not have to print and mail their correspondence.
- To create consistency in company outgoing correspondence.
- To enable one location to fulfill all requests for collateral and literature materials included with correspondence as enclosures.

If you set up fulfillment centers, the user can generate correspondence, and then click Submit to submit the correspondence for fulfillment. When the user clicks Submit, the Status field of the correspondence request changes to Submitted, and the request becomes read-only. You cannot make any further changes in the correspondence without using the Recall command.

Process of Setting Up and Using Fulfillment Centers

To set up and use a fulfillment center, perform the following tasks:

1. *Adding Fulfillment Center Records*

2. *Providing Fulfillment Center Access to Siebel Correspondence*
3. *Sending Correspondence to Fulfillment Centers*
4. *Monitoring Fulfillment Requests*
5. *Recalling Submitted Correspondence*

Adding Fulfillment Center Records

You must create one or more fulfillment center records, so users can select a fulfillment center when they create a correspondence request.

This task is a step in *Process of Setting Up and Using Fulfillment Centers*.

To add a fulfillment center record

1. Navigate to the Administration - Data screen, then the Fulfillment Centers view.
2. In the Fulfillment Centers list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	Type the name of the fulfillment center.
Main Phone #	Type the telephone number of the fulfillment center.
Main Fax #	Type the fax number of the fulfillment center.
Fulfillment Team	Select one or more employees at the fulfillment center. These employees can view correspondence submitted to this fulfillment center. If there is no one on a fulfillment team, no one can see correspondence submitted to this fulfillment center.
Description	Type a description of the fulfillment center.

Providing Fulfillment Center Access to Siebel Correspondence

The fulfillment team at the fulfillment center must monitor pending fulfillment requests. Everything a requester submits is visible to the fulfillment team in the Fulfillment screen.

Fulfillment center employees fulfill the request by viewing and printing the correspondence request and including the listed enclosures. They can either print the enclosure, or get an already-printed copy (for example, if the enclosure is a glossy brochure).

This task is a step in *Process of Setting Up and Using Fulfillment Centers*.

To provide a fulfillment center access to Siebel Correspondence

1. Set up fulfillment center employees as Siebel Correspondence users in the same way that you set up other employees or channel partners as Siebel Correspondence users.

   For more information about setting up users of Siebel applications, see *Siebel Security Guide* .
2. Give fulfillment center employees a responsibility that lets them see the Fulfillment screen.

   Use the Fulfillment Center Employee responsibility in the seed data. For more information about responsibilities, see *Siebel Applications Administration Guide* .
3. Notify fulfillment center employees about the URL to use to view correspondence through the Web.

Sending Correspondence to Fulfillment Centers

When the fulfillment center can access Siebel Correspondence, you can submit fulfillment requests from the Correspondence list.

This task is a step in *Process of Setting Up and Using Fulfillment Centers*.

To send correspondence to a fulfillment center

1. Navigate to the Correspondence screen, then the My Correspondence Requests view.
2. In the Correspondence list, select the correspondence that you want to submit to a fulfillment center.
3. Select the appropriate fulfillment center in the Fulfillment Center field.
4. Click Submit.

   The Status field changes to Submitted, and the Document Status field changes to In Queue.

Monitoring Fulfillment Requests

When you submit correspondence to a fulfillment center, the Status field of the correspondence changes to Submitted. When the correspondence request is fulfilled, the fulfillment center updates the Status field to Completed. You can monitor the status to determine the date and time that the correspondence was sent and arrange follow-up calls and sales visits accordingly.

Similarly, a fulfillment center manager can monitor the status of pending requests by reviewing the Status field in the Fulfillment screen.

This task is a step in *Process of Setting Up and Using Fulfillment Centers*.

To monitor fulfillment requests

1. Navigate to the Correspondence screen, then the My Correspondence Requests view.
2. In the Correspondence list, select the correspondence record, and view the value in the Status field.

Recalling Submitted Correspondence

You can recall correspondence records that you submit, as long as the records are not fulfilled. You recall correspondence to modify it and resubmit it for fulfillment.

This task is a step in *Process of Setting Up and Using Fulfillment Centers*.

To recall submitted correspondence

1. Navigate to the Correspondence screen, then the My Correspondence Requests view.
2. In the Correspondence list, select the correspondence you want to recall.
3. Click Menu (the cogwheel icon), and select Recall.

   The Status field value changes from Submitted to In Progress.

7 Batch Printing

Batch Printing

This chapter includes information about setting up and using batch printing for documents that the Document Server generates, such as correspondence, proposals, and presentations. It includes the following topics:

- *About Batch Printing*
- *Setting Up Batch Printing for Administrators and Users*
- *Adding Server Print Menu Items*
- *Configuring Printers for Server-Based Batch Printing*
- *Performing Batch Printing (End User)*

About Batch Printing

Batch printing simplifies the task of printing multiple correspondence items. The user first selects one or more correspondence items, and then selects Print in the menu that appears for Menu (the cogwheel icon). The documents are then printed on the appropriate printer.

Siebel applications support two types of batch printing, server-based and client-based. Initially, the print menu item appearing in the Correspondence and Fulfillment screens is configured to perform client-based batch printing. However, the administrator can use Siebel Tools to reconfigure these menus to use server-based batch printing, either in addition to, or instead of, client-based batch printing.

Note: If you experience issues with batch printing, you can set up WebDAV (Web-based Distribution Authoring and Versioning) for the IIS (Internet Information Server) to enable collaboration between the Siebel Server in a UNIX computer with the Document Server in a Windows computer.

Client-Based Batch Printing

When a user prints a document using client-based batch printing, the Siebel application launches Microsoft Word on the user's client. It then retrieves the document from the Siebel File System and prints it to the default printer configured for the user's desktop session.

For this feature to work correctly, the end user must configure DISA on client machine , and able to launch Microsoft Word using Edit button on File Download Dialog box. Please refer to Batch Fulfillment Printing in the DISA guide.

Server-Based Batch Printing

When a user prints a document using server-based batch printing, a request is sent to the DocServer server component. This component then prints the document to the printer the user specifies in the User Preferences screen. If the user

does not specify a preference, the document is printed on the default printer the system administrator configures on the Document Server computer.

When a user initiates server-based batch printing for a correspondence document, a request is sent to the DocServer component. This request contains the values for the Default Printer and Printer Driver preferences the user selects in the Correspondence view of the User Preferences screen. After receiving the request, the Document Server uses Microsoft Word to convert the document into a PostScript file. The value for the Printer Driver user preference determines the style of generated PostScript. This parameter specifies the name of a network printer. The PostScript file is suitable for this printer and all other printers of the same model. After the PostScript file is generated, the Document Server sends the file to the printer specified in the Default Printer user preference.

Setting Up Batch Printing for Administrators and Users

The following table lists procedures for setting up batch printing for administrators and end users. Administrators set up server-based batch printing; end users set up server-based and client-based batch printing.

Setup Procedures for Administrators	Setup Procedures for End Users
Add server print menu items to the Correspondence and Fulfillment screens.	Verify system requirements for client-based batch printing.
Set up the printer configuration.	Configure Internet Explorer to permit client-based batch printing.
Add a printer connection to the Document Server computer.	Add a printer connection to the desktop for client-based batch printing.
Change the default printer (if necessary).	Change the default printer (if necessary).
	Specify a printer for server-based batch printing.

Adding Server Print Menu Items

To set up server-based batch printing, administrators can add server print menu items to the Correspondence and Fulfillment screens. After completing the task in this topic, verify that the Server Print and Server Print Label menu items appear in the menus for the Correspondence and Fulfillment screens.

To add server print menu items

1. In the Object Explorer window of Siebel Tools, under Siebel Objects, select Applet.
2. In the Applets window, query for Correspondence List Applet in the Name column.
3. In the Object Explorer, select Applet Method Menu Item.
4. In the Applet Method Menu Item window, select the record with Server Print in the Menu Text column, and clear the Inactive check box in the Inactive column.

5. In the Applet Method Menu Item window, select the record Server Print Label in the Menu Text column, and clear the Inactive check box in the Inactive column.
6. In the Application menu, click Tools, select Compile Projects, and then in the Project Selection window, select the Corresp (SSE) project.
7. Browse and select the appropriate siebel.srf file, and click Compile.
8. Starting with Step 2, repeat this procedure for the Fulfillment screen, and query for Fulfillment List Applet in the Applets window.

Configuring Printers for Server-Based Batch Printing

Administrators can perform the following tasks to support server-based batch printing:

1. Identify the printer models in the enterprise to use for server-based batch printing.
2. For each model, select one network printer, and add a printer connection to it on the Document Server computer.
3. Designate one configured printer as the default printer for the Document Server computer.
4. Provide the list of configured printers to end users, who use the list to select a printer driver in the User Preferences screen.

For example, an organization has five Xerox Model A printers (xrx001 to xrx005), and five Canon Model B printers (cnn001 to cnn005). A printer server (hqsrvr) is used to route requests to all of the printers. The administrator decides to use the xrx005 printer to represent the Xerox Model A printers and the cnn005 printer to represent the Canon Model B printers, and adds printer connections on the Document Server computer for each printer. The administrator selects the xrx005 printer as the default printer. The DocServer component uses these connections to generate PostScript files. Only one printer for each model is actually configured on the Document Server computer. After creating the printer connections, the administrator notifies the end users of the network names of the configured printers (\\hqsrvr\xrx005 and \\hqsrvr\cnn005).

A user wants to use the cnn003 printer for personal batch printing requests. The user navigates to the Correspondence view of the User Preferences screen and enters **\\hqsrvr\cnn003** in the Default Printer field and **\\hqsrvr\cnn005** in the Printer Driver field. All subsequent batch printing requests the user submits are sent to the cnn003 printer.

> **Note:** If a user does not specify a default printer in the Correspondence view of the User Preferences screen, then the user's batch printing requests are sent to the default printer for the Document Server. Printing is directly through Microsoft Word; no intermediate PostScript file is created.

Adding a Printer Connection to the Document Server Computer

Complete the following procedure to add a printer connection to the Document Server computer.

To add a printer connection to the Document Server computer

1. Log in to the Document Server computer using the same User ID for the Windows Service running the Siebel Server.
2. Navigate to Start, Settings, and then Printers.
3. Double-click the Add Printer button.
4. On the Welcome screen, click Next.
5. On the Local or Network Printer screen, select Network Printer, and click Next.
6. On the Locate Your Printer screen, select Network Printer, and click Next.

7. On the Default Printer screen, select either Yes or No, click Next, and click Finish.

Changing the Default Printer for Server-Based Batch Printing

Complete the following procedure to change the default printer.

To change the default printer for server-based batch printing

1. Log in to the Document Server computer using the same User ID for the Windows Service running the Siebel Server.
2. Navigate to Start, Settings, and then Printers.
3. In the printer list, right-click a printer and select Set as Default.

Performing Batch Printing (End User)

To batch print, end users select correspondence items in the Correspondence screen, and then select Print in the menu that appears for Menu (the cogwheel icon). The print menu item is active only if the selected correspondence record has a value of Completed in the Document Status field.

The print menu item in the Correspondence and Fulfillment screens is configured for client-based printing. However, administrators can configure server-based printing in addition to (or instead of) client-based printing. Check with the system administrator to determine the available print methods.

Preparing for Client-Based Batch Printing

When you use client-based batch printing, the Siebel application launches Microsoft Word on your client. The Siebel application retrieves the document from the Siebel File System and prints it to the default printer configured for your desktop session. Before using client-based batch printing, verify that the following tasks are complete:

- Install Microsoft Word on the client.
- Configure Internet Explorer to start Microsoft Word.
- Configure the default printer for your desktop.

To prepare for client-based batch printing, perform the tasks in this topic.

Note: The options in the following procedures can vary depending on the version of Microsoft Office you use.

Adding a Printer Connection to Your Desktop

Complete the following procedure to add a printer connection to your desktop.

To add a printer connection to your desktop

1. Navigate to Start, Settings, and then Printers.
2. Double-click the Add Printer button.
3. On the Welcome screen, click Next.

4. In the Local or Network Printer screen, select Network Printer, and click Next.
5. In the Locate Your Printer screen, select Type the Printer Name.
6. Enter the network name of the printer, or click Browse and select the printer, and click Next.
7. In the Default Printer screen, select either Yes or No, and click Next, and click Finish.

Changing the Default Printer for Client-Based Batch Printing

Complete the following procedure to change the default printer.

To change the default printer for client-based batch printing

1. Navigate to Start, Settings, and then Printers.

   The current default printer is marked with a check mark.
2. In the printer list, right-click the printer and select Set as Default.

Printing Documents Using Client-Based Batch Printing

Complete the procedure in this topic to print documents using client-based batch printing.

To print documents using client-based batch printing

1. Close files that are open in Microsoft Word.
2. Navigate to either the Correspondence or Fulfillment screen.
3. Select one or more records in the Correspondence list.

   The selected records must have a Document Status field value of Completed.
4. In the Correspondence list, click Menu (the cogwheel icon), and then select Print.

   The selected documents are printed on the default printer.

Preparing for Server-Based Batch Printing

To prepare for server-based batch printing, perform the task in this topic. Server-based batch printing sends a printing request to Oracle's Siebel Document Server. The document is then sent to the printer specified in the User Preferences screen. If you do not specify a printer, the document is printed on the default printer that the system administrator configures.

To specify a printer for server-based batch printing

1. Navigate to the User Preferences screen, then the Correspondence view.
2. In the Default Printer field, enter the network name of the printer for correspondence.

   The network name contains both the printer server name and the printer name as follows:

   ```
   \\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 save the record.

The system administrator can provide you with a list of printer drivers and their associated printer types. Select the printer driver associated with the printer used for correspondence.

Printing Documents Using Server-Based Batch Printing

Complete the procedure in this topic to print documents using server-based batch printing.

To print documents using server-based batch printing

1. Navigate to either the Correspondence or Fulfillment screen.
2. Select one or more records in the Correspondence list.

   The selected records must have a Document Status field value of Completed.
3. In the Correspondence list, click Menu (the cogwheel icon), and then select Print.

   The selected documents are printed on the default printer.