



Siebel Customer Relationship Console User Guide

Version 8.0

December 2006

ORACLE®

Copyright © 2005, 2006, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

PRODUCT MODULES AND OPTIONS. This guide contains descriptions of modules that are optional and for which you may not have purchased a license. Siebel's Sample Database also includes data related to these optional modules. As a result, your software implementation may differ from descriptions in this guide. To find out more about the modules your organization has purchased, see your corporate purchasing agent or your Siebel sales representative.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS. Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Contents

Chapter 1: What's New in This Release

Chapter 2: Overview

Key Features 7

Getting Started with the Siebel CRC 8

Access and Responsibilities 9

Web Browser Settings 9

Exiting the Siebel CRC 10

Chapter 3: Understanding the Siebel CRC Layout

Siebel CRC Window Overview 11

Search 11

Contacts 11

Referrals 12

Action 12

Customer Session Navigation Buttons 12

Contact Photo 13

Contact Signature 13

Alerts Bar 13

Chapter 4: Working with Data

Working with Records and Fields 15

Field Controls 15

Text Fields 15

Drop-Down Lists 16

Saving Data 16

Adding Records to Siebel CRC 16

Chapter 5: Locating Information

Searching for Contacts and Starting a Customer Session 17

About Start Session 18

Customer Session Views 19

Querying for Session Information 19

Summary Session View	19
Special Offers	20
Alerts	20
Accounts Session View	20
Viewing Detailed Account Transaction Information	21
Offers Session View	22
Viewing Detailed Offer Information	23
Alerts Session View	23
Activities Session View	24
Service Requests (SRs) Session View	25

Chapter 6: Adding Information

About Adding Data to Siebel CRC	27
Adding Service Requests	27
Creating Alerts	29
Adding Activities	30
Adding Prospects and Referrals	31
Entering Customer Responses to Offers	32

Appendix A: Query Operators

Index

1

What's New in This Release

What's New in Siebel Customer Relationship Console User Guide, Version 8.0

This guide has been updated to reflect product name changes. It was previously published as *Siebel Customer Relationship Console User Guide, Version 7.7, Rev. A*.

2 Overview

This guide provides detailed coverage of Oracle's Siebel Customer Relationship Console (CRC) and how to use it, including working with data; locating information with the search features; and sharing information with other users.

It is strongly recommended that you read this guide so that you can make optimal use of your Siebel application, especially if you are new to Siebel software.

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of associates in these categories.

Associate	A person in a position who is involved in customer-facing activities and has a need of a high level awareness of said customer.
Teller	The banking position "Teller" is a potential role for the Siebel CRC. A teller can look up customer information and do referrals as they handle banking transactions for the customer.

The Siebel CRC is designed for retail banks and other enterprise organizations as a component-based option for delivering customer insight and relationship management capabilities to a wide range of users.

The solution is designed to run as a stand-alone solution or in conjunction with other applications already installed in the organization. This flexibility allows organizations to enhance the usefulness of existing systems without having to go through a full replacement cycle.

Siebel CRC delivers new functionality and detailed customer insight to users to improve their interaction with customers.

This chapter contains the following topics:

- [Key Features](#)
- [Getting Started with the Siebel CRC on page 8](#)
- [Exiting the Siebel CRC on page 10](#)

Key Features

The key features of Siebel CRC are:

Referral Management

- Capture referrals
- Monitor captured referrals

Service Request Management

- Capture basic service requests
- Monitor customer service requests

Cross-Sell Prompting

- Present personalized offers
- Capture offer response (referral)

Customer Profiles

- Summary customer view
- Identification tokens
- Customer value indicators

Activity Management

- Multichannel customer interaction history
- Schedule calls, meetings, and appointments

Financial Accounts

- Account inquiries

Alerts

- Customer and account alerts
- Broadcast

Getting Started with the Siebel CRC

You access Siebel Web Client using a URL provided by your organization. When you use the URL, a login screen appears, prompting you to enter a user ID and password. Your system administrator can assist you with this task.

NOTE: If your organization has set up access to the Sample database, you can familiarize yourself with the Siebel application through the demo version of the system. The demo application automatically logs you in and connects you to the Sample database. You are free to add and delete information in the Sample database while becoming familiar with the application.

Access and Responsibilities

Your system administrator will assign to you an employee login on the server with a unique ID and password. The login assigned to you defines your job responsibilities, and the data you need to access to fulfill those responsibilities, at the time when you log in to the application.

Responsibilities are defined for you by your system administrator. They determine the collection of *views* you see. For example, if you were a sales manager, you would need views to manage your team's accounts, contacts, and opportunities, but your sales representatives would not need these views.

A *position* is the basis for determining what *data* you can access. It allows you to see certain records but not others. The position represents an assigned job title within an organization. By assigning you a position (job title), the administrator can determine the set of data you should see. For example, the South American VP of Sales would not see the same data as a North American sales representative.

The following are three factors that could determine what records you can see:

- A record can be assigned an owner, meaning that it can be assigned to only one person. Only the owner of the record can see it. This type of record is called a *personally owned record* because only one user can own the record.
- A record can also be assigned to a team. Only the people who have been assigned as team members for the record can see it.
- Companies also distribute records by organization. Users in the South American region of an organization will see only records for South America. Companies with channel partners can also use organizations to partition data, allowing their partners to access only data that they need.

Web Browser Settings

Siebel CRC is initially installed running within a Web browser window. Your implementation may differ. Your system administrator can assist you with any questions.

You may want to adjust some of your Web browser's settings to use Siebel Web Client properly.

Browser Security

If your browser security setting zone is set to medium or higher, you will be prompted by a security warning window when you launch your Siebel application. To remove this window and make sure it does not reappear, check the Always trust content from Oracle check box.

Maintaining the Siebel Application in the Browser Window

If you are using Microsoft Internet Explorer, you can change a setting in Internet Options so that the Siebel application is not replaced when you launch Internet Explorer from a shortcut in another program.

To maintain the Siebel application in the browser window

- 1 Start Internet Explorer.
- 2 Choose Tools > Internet Options.
The Internet Options dialog box appears.
- 3 In the Internet Options dialog box, click the advanced tab.
- 4 Under Browsing, clear the Reuse windows for launching shortcuts check box.
- 5 Click OK.

Exiting the Siebel CRC

You should not simply close the browser window to exit the Siebel CRC.

To exit the application

- 1 On the menu bar, click the Action drop-down list and select Log Out.
- 2 Click Go.

3

Understanding the Siebel CRC Layout

This chapter discusses the standard layout of the Siebel CRC application. After reading this chapter, you will understand each part of the Siebel CRC layout and its function in the application.

In addition, you will understand general navigation techniques for moving through the Siebel CRC application.

Siebel CRC Window Overview

Figure 1 shows important elements of the Siebel application window. This is the first view you see after logging in to the application.

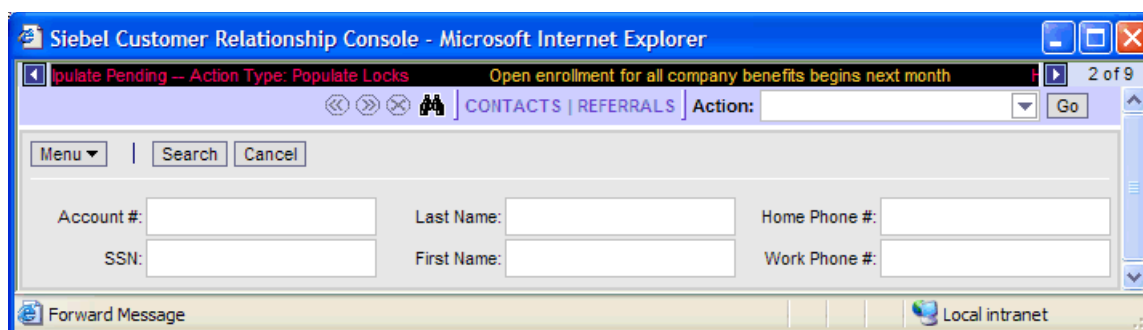


Figure 1. Search View

The Siebel CRC console contains the following controls and displays.

Search

Click the binoculars icon to return to the search view.

Contacts

Click the Contacts menu item to navigate to one of the following, based upon whether or not you have someone in session. For more information on sessions, see [“Querying for Session Information” on page 19](#).

- **With a contact in session** the system navigates you to the summary view for that contact.
- **With no contact in session** the system navigates you to the search view.

Referrals

With Siebel CRC, you can generate and review your referrals. A referral is a lead generation in which you have qualified a specific bank product as being of value to a customer.

To access your referrals click the Referrals menu item. This is a read-only view.

Action

Click the down arrow in the Action field to access various actions.

Depending on whether or not you have a customer in session, you will have access to some or all actions as listed in [Table 1](#).

For more information on sessions, see [“About Start Session” on page 18](#).

Table 1. Available Actions

Action	Customer in Session	Customer Not in Session
Add a Referral	Yes	Yes
Add a Service Request	Yes	Yes
Add an Activity	Yes	Yes
Add a Prospect	Yes	Yes
Capture a New Application	No	No
Review Attachments	Yes	Yes
Log Out	Yes	Yes

Customer Session Navigation Buttons

The customer session navigation buttons ([Figure 2](#)) allow you to move between customer sessions and close sessions.



Figure 2. Customer Session Navigation Buttons

Next Contact

Click this menu icon for the next customer in session. The icon is disabled when there are less than two contacts in session.

Previous Contact

Click this menu icon for the previous contact in session. The icon is disabled when there are less than two contacts in session.

Close Current Contact Session

Click this menu icon to close the current contact in session.

Contact Photo

This area may or may not display a photo of the contact in session, depending on whether or not, through your base Siebel application, a contact photo has been attached to the contact. Instead of a photo, your organization can choose to show its company logo.

Contact Signature

Click the signature button to view the signature window containing contact's signature, again only if your base Siebel application has attached a signature to the contact.

Alerts Bar

At the top of the menu bar there is a scrolling message that presents one or more enterprise alert messages. This information is administered through your base Siebel application. Contact your Siebel administrator for additional information on how to broadcast a message on the alerts bar.

4

Working with Data

This chapter provides information about tasks such as adding, deleting, and editing records. You will become familiar with using field controls to add data to the system and will learn about the tools available for organizing your data.

This chapter includes the following topics:

- [“Working with Records and Fields” on page 15](#)
- [“Adding Records to Siebel CRC” on page 16](#)

Working with Records and Fields

A record is a group of related data organized into fields. For example, information about a contact, including last name, first name, address, and phone number, makes up a contact record. A record can appear in a list of related records, such as a list of contact records, or it can be displayed individually in a form. [Figure 4 on page 18](#) shows an example of records in a list.

There are two reasons you may not see every field that belongs to a record:

- You are viewing the record in a list in which not all fields can be displayed because there is not enough room for them.
- You are viewing the record in a collapsed form.

Field Controls

You can enter data into the application by typing directly into fields or by using field controls. Field controls are tools that you use to interact with a record. A field control can be a check box, a drop-down list, a button, and so on.

Field controls allow you to do such things as choose from a list of predefined values, enter values in a multi-value field, specify dates, and calculate values.

A field control can appear within a form or as part of a record in a list. To use a field control to edit a record in a list, click the control to activate it. In a form, you can see the field control if one is available. In a list, you do not see a field control until you click in a field that includes one.

NOTE: A field that has an asterisk beside it is a required field. You cannot save a record until you have entered data in all required fields.

Text Fields

You can type text directly into text fields by clicking within the field and typing.

Date fields only allow you to enter dates from January 1, 1753 to December 31, 4712. If you enter an incorrect value in a date field, you will receive an error. For example, if you enter 01/01/19999, you will receive an error.

Many text fields can hold only a specific number of characters. The allowable number varies throughout the application. Numerical fields have a 14-character limit.

Drop-Down Lists

Click the down arrow button to the right of the field to select from a list of available values.

Saving Data

Click Save to save a record.

Adding Records to Siebel CRC

You can add records through the Action drop-down list or by clicking the New button available on some of the customer session view tabs.

Valid actions are:

- Add a Service Request
- Add an Activity
- Add a Referral
- Add a Prospect

The New button is available on the following session tabs within a customer session:

- SRs (Service Requests)
- Activities
- Alerts

5

Locating Information

This chapter explains how to locate the Siebel CRC information you need. It includes the following topics:

- [“Searching for Contacts and Starting a Customer Session” on page 17](#)
- [“Customer Session Views” on page 19](#)
- [“Summary Session View” on page 19](#)
- [“Accounts Session View” on page 20](#)
- [“Offers Session View” on page 22](#)
- [“Alerts Session View” on page 23](#)
- [“Activities Session View” on page 24](#)
- [“Service Requests \(SRs\) Session View” on page 25](#)

Searching for Contacts and Starting a Customer Session

By default, the Siebel CRC displays the search view (see [Figure 3](#)).

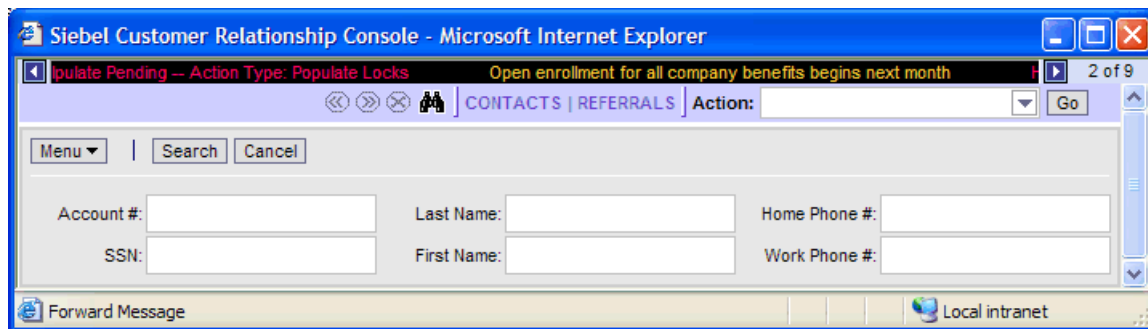


Figure 3. Search View

Use the search view to locate a particular contact record. Once you have located the contact for which you need to review or add information, start a session with that contact. See [“About Start Session”](#) for more information on sessions.

About Start Session

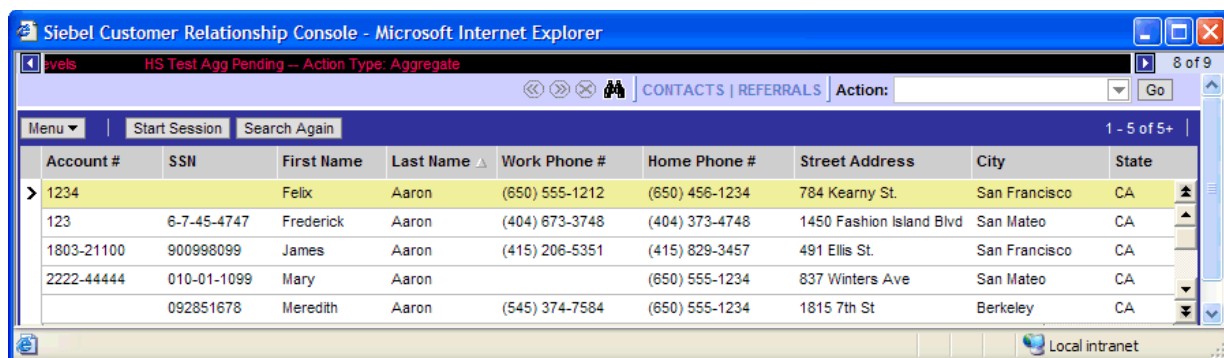
A session within Siebel CRC is a way to review available information for an individual contact, as well as create new associated data records for that contact. Once a contact is put into a session all the Siebel CRC session tab information is based upon the contact in the current session.

At any time you can select Search on the menu bar, select a contact, and enter that contact into a new session. If you have launched more than one session, click the previous and prior icons to toggle between active sessions.

An example of when you might want to have more than one session at a time is if you are working with a joint account. Customer Paul Agee enters his bank to understand the status of a check order, but it was his wife and joint account owner, Melissa Agee, who placed the order. The bank teller must review service requests placed by both Paul and Melissa to resolve Paul's inquiry.

To search for a contact

- 1 From the search view, enter search criteria in the search fields.
NOTE: Standard Siebel query operators are available. See [Appendix A, "Query Operators"](#) for more information.
- 2 Click Search to run the search.
- 3 In the search results list (see [Figure 4](#)), select a customer by clicking the row.
- 4 To run a new search, click the Search Again button or menu item Search.



Account #	SSN	First Name	Last Name	Work Phone #	Home Phone #	Street Address	City	State
1234		Felix	Aaron	(650) 555-1212	(650) 456-1234	784 Kearny St.	San Francisco	CA
123	6-7-45-4747	Frederick	Aaron	(404) 673-3748	(404) 373-4748	1450 Fashion Island Blvd	San Mateo	CA
1803-21100	900998099	James	Aaron	(415) 206-5351	(415) 829-3457	491 Ellis St.	San Francisco	CA
2222-44444	010-01-1099	Mary	Aaron		(650) 555-1234	837 Winters Ave	San Mateo	CA
	092851678	Meredith	Aaron	(545) 374-7584	(650) 555-1234	1815 7th St	Berkeley	CA

Figure 4. Search Results List

To start a customer session

- 1 From the search results list, click the row for the customer you wish to enter into a session.
- 2 Click Start Session.

Customer Session Views

Figure 5 shows the six session view tabs. Each view tab covers a different topic. To access a view, click the related view tab.



Figure 5. View Tabs

For information on how to start a customer session see [“Searching for Contacts and Starting a Customer Session”](#) on page 17.

Querying for Session Information

In the Siebel CRC application, there is a built-in query function to help you locate specific customer session information. Within a customer session, querying is available on the following session tabs:

- Accounts
- Offers
- Alerts
- Activities
- SRs

To query for specific customer session information

- 1 Begin a customer session and click the desired session tab.
- 2 Click Query and enter your query criteria.

TIP: You can also use Query Assistant to help form your query. For help with the standard query function, see [Appendix A, “Query Operators.”](#)

- 3 Click Go to execute the query.

Summary Session View

When you start a customer session, you begin at the Summary session view ([Figure 6](#)). Whenever you have a customer in session, clicking the Contacts menu item returns you to the Summary view.

The Summary view provides an overview of a customer's:

- Contact information
- Identification tokens
- Demographic and authentication information

- Value and profitability
- Branch Id
- Key alerts
- Special offers



Figure 6. Summary View

Special Offers

Highlighted under Special Offers you may have one or more offers that have been system-selected for this customer based on his profile and the specifics of the offer. Click any offer to see a list of all such offers.

Alerts

Highlighted under Alerts are special contact alerts that you or your colleagues have associated with the contact. Click any alert to see a list of all such alerts.

Accounts Session View

Figure 7 shows the Accounts session view. This is a read-only list view that highlights key information about financial accounts for the contact.

The Accounts view provides information about:

- Financial products and services held by the customer
- Status of the account
- Current and available balances related to each account

- Account number for authentication purposes

Account #	Product	Type	Current Balance	Outstanding Balance	Status
6585-016789	Premiere Plus Savin	Savings/MMA	\$9,027.81		Open
1329-332567-003	Certificate of Depos	CD	\$13,947.29		Open
4456-7878-898-909	Regular Mastercard	Credit Card	\$450.75	\$1,551.00	Open
10029394	Residential Mortgage	Loans	\$405,598.11	\$405,598.93	Open
88-6326892399	Millennium SEP Plan	Investments	\$17,230.00	\$0.00	Open

Figure 7. Accounts View

Table 2 shows the information provided on each account.

Table 2. Accounts Fields

Field	Description
Account #	The official ID for each account.
Product	The official bank product name.
Type	The type of account, such as CD, credit card, or loan.
Current Balance	The current balance of funds plus any funds deposited but pending posting.
Available or Outstanding Balance	The current funds available for use.
Status	The current state of the account.

Viewing Detailed Account Transaction Information

Detailed account transaction information is available through the Accounts view.

To view detailed transaction information

- 1 Begin a customer session and click the Accounts session tab.
- 2 In the Accounts list, select an account for which you wish to see details of recent transactions, and do one of the following:
 - Drill down on the account number.
 - Click the Details button.

3 Review the transaction information as described in the following table:

Field	Description
Post Date	The date of system execution.
Item Type	The type of transaction such as check or deposit.
Item #	The official document identification, such as check number.
Description	A detailed description of the nature of the transaction, such as mortgage payment or interest payment.
Amount	The actual amount of the transaction.
Points Earned	Any special program points, for example, frequent flier points.

4 Return to the customer session summary view by clicking the Contacts menu item.

Offers Session View

Figure 8 shows the Offers session view. This is a read-only list view that highlights key information about offers that have been singled out for the contact based on some organizational criteria.

The Offers view presents:

- Current cross-sell and upsell offers targeted at the customer
- Brief description of the offers
- Ability to navigate between different offers

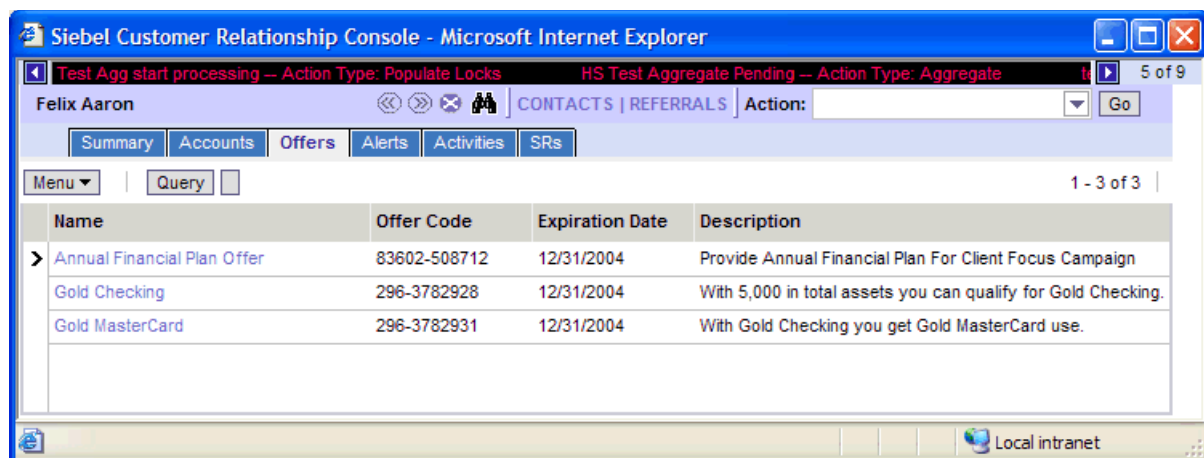


Figure 8. Offers View

Table 3 shows the information provided on each offer.

Table 3. Offers Fields

Field	Description
Name	The name of the offer.
Offer Code	A unique code that defines the offer.
Expiration Date	The date by which the offer will end.
Description	A high-level definition of what the offer is about.

Viewing Detailed Offer Information

There is an additional view available to you which provides more detailed information on the offer and provides a way to enter the customer's response to the offer.

For information on entering the customer's response, see [“Entering Customer Responses to Offers” on page 32](#).

To view detailed offer information

- 1 Begin a customer session and click the Offers session tab.
- 2 Drill down on the offer name to review the detailed information.

Alerts Session View

Figure 9 shows the Alerts session view, a read-only list view that highlights key information about alerts that have been associated with the contact based on information collected anywhere throughout the organization.

NOTE: For more information on creating alerts, see [“Creating Alerts” on page 29](#).

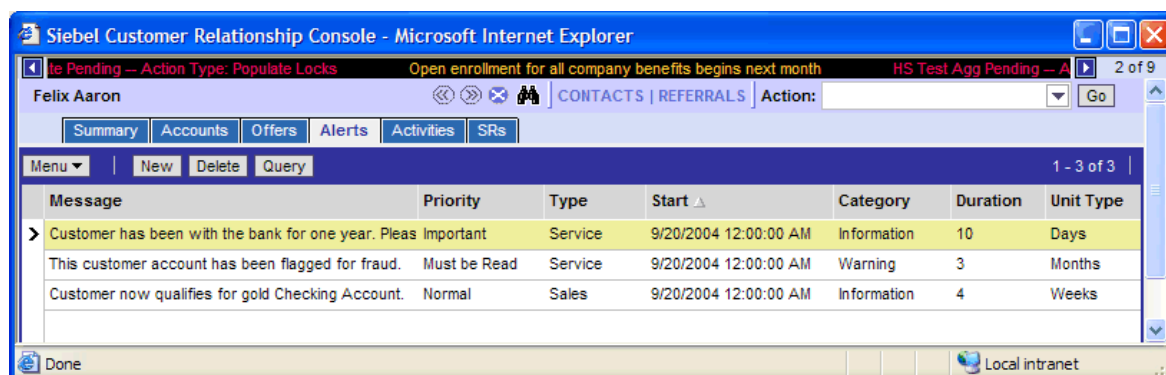


Figure 9. Alerts View

Table 4 shows the information provided on each alert.

Table 4. Alerts Fields

Field	Description
Message	The context of the alert.
Type	A designated name given to the alert. Many times this is reflective of the group that generated the alert (such as All, Service, or Trading).
Priority	A designated level of awareness indicator relating to the alert. This is an organization-defined priority to bring awareness to the alert.
Expiration	The date the alert will end. This field is automatically populated based on the values entered in Duration and Unit Type.
Start	The start date for the alert.
Duration	A numeric value, which, together with the Unit Type, indicates how long the alert will be active.
Unit Type	A unit of time, such as months or weeks. Together with the Duration, Unit Type indicates how long the alert will be active.
Category	Type of alert, either informational or warning.

Activities Session View

Figure 10 shows the Activities session view. This is a read-only list view that highlights key information about activities that have been associated with this contact based on information collected from anywhere in the organization.

For more information on creating activities, see [“Adding Activities” on page 30](#).

The Activities view provides insight into:

- Most recent activity and contact with the customer
- Nature, purpose, result or action precipitated by that contact
- When and with whom the contact took place

- Any outstanding activities that may require action

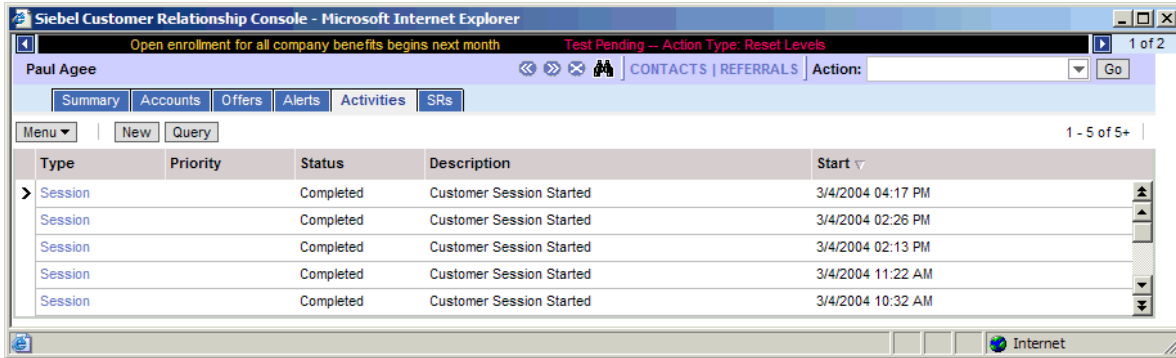


Figure 10. Activities View

Table 5 shows the information provided on each activity.

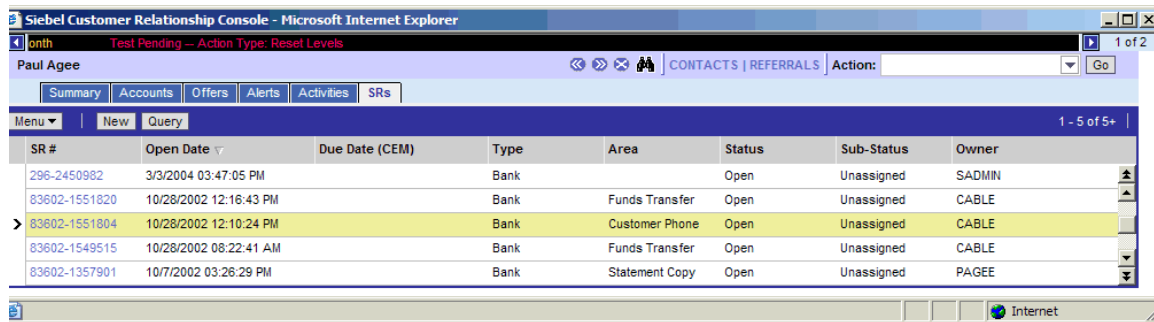
Table 5. Activities Fields

Field	Description
Type	What the activity is, such as a Call, Note or other action taken on behalf of the contact.
Priority	A designated level of awareness indicator relating to the alert. This is an organization-defined priority to bring awareness to the action.
Status	The current state of this action such as not started, done or canceled.
Description	The nature of the activity.
Planned or Start	The date for which action is planned to start for this activity.

Service Requests (SRs) Session View

Figure 11 shows the SRs session view. This is a read-only list view that highlights key information about service requests that have been associated with a contact based on information collected from anywhere in the organization.

The SRs view provides insight into customer service requests. For more information on creating SRs, see [“Adding Service Requests” on page 27](#).



SR #	Open Date	Due Date (CEM)	Type	Area	Status	Sub-Status	Owner
296-2450982	3/3/2004 03:47:05 PM		Bank		Open	Unassigned	SADMIN
83802-1551820	10/28/2002 12:16:43 PM		Bank	Funds Transfer	Open	Unassigned	CABLE
83802-1551804	10/28/2002 12:10:24 PM		Bank	Customer Phone	Open	Unassigned	CABLE
83802-1549515	10/28/2002 08:22:41 AM		Bank	Funds Transfer	Open	Unassigned	CABLE
83802-1357901	10/7/2002 03:26:29 PM		Bank	Statement Copy	Open	Unassigned	PAGEE

Figure 11. SRs View

Table 6 shows the information provided on each SR.

Table 6. SRs Fields

Field	Description
SR #	Uniquely generated number identifying the service request.
Open Date	Date the service request was opened.
Due Date (CEM)	The date when the service request is due to be closed.
Area	The organization area to which the service request applies.
Type	The specific type of service request given the area.
Status	The current state of the service request.
Sub-Status	A more granular designation of the status.
Owner	The user ID of the person who created the service request.

6

Adding Information

This chapter explains how to add customer information into your Siebel CRC application. It includes the following topics:

- ["About Adding Data to Siebel CRC" on page 27](#)
- ["Adding Service Requests" on page 27](#)
- ["Creating Alerts" on page 29](#)
- ["Adding Activities" on page 30](#)
- ["Adding Prospects and Referrals" on page 31](#)
- ["Entering Customer Responses to Offers" on page 32](#)

About Adding Data to Siebel CRC

The Action item on the menu bar lets you add certain records to the system:

- Service Requests
- Alerts
- Activities
- Referrals
- Prospects

You can also add records from some of the customer session tabs.

Adding Service Requests

By adding a new Service Request (see [Figure 12](#)) you can:

- Capture basic service requests
- Create new service requests
- Enter basic details of the request (Type, Area, Summary, and so on)

- Submit the service request for process and resolution

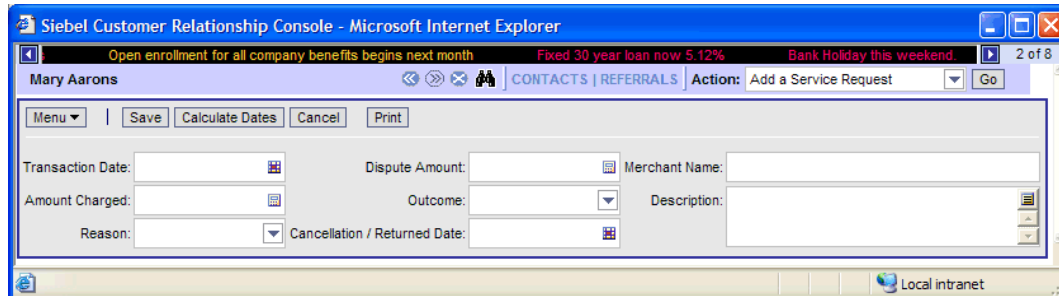
The screenshot shows a web browser window titled 'Siebel Customer Relationship Console - Microsoft Internet Explorer'. The address bar shows 'Open enrollment for all company benefits begins next month', 'Fixed 30 year loan now 5.12%', and 'Bank Holiday this weekend'. The main content area displays a form for 'Mary Aarons' with a 'CONTACTS | REFERRALS' tab selected. The 'Action' dropdown is set to 'Add a Service Request'. The form includes fields for 'Transaction Date', 'Dispute Amount', 'Merchant Name', 'Amount Charged', 'Outcome', 'Description', 'Reason', and 'Cancellation / Returned Date'. There are buttons for 'Menu', 'Save', 'Calculate Dates', 'Cancel', and 'Print'.

Figure 12. Add Service Requests View

To add a service request

- 1 Start a session for the customer initiating the service request.
- 2 From the menu bar, click the down arrow in the Action field, select Add a Service Request, and click Go.

NOTE: An alternative approach to adding a new Service Request is to select the SRs session tab and then click New.

- 3 Select the service request type from the drop-down list:

- Complaints
- Statement Copy
- Transaction Dispute
- Check Copy
- Lost/Stolen Information

- 4 Click Next.

- 5 Complete the fields as necessary.

The fields will vary based upon the service request type selected in Step 3. Some of the fields are described in the following table.

Field	Description
Priority	The level of importance of closing the service request.
Description	Descriptive text for the service request.
Status	The status of the service request.
Area	The area further defines the kind of service request.
Source	How the customer contacted you to report the service request.

Field	Description
Sub-Status	The status at a more granular level.
Follow-Up Method	The customer's preferred method of contact.

- Click Save.

NOTE: At any time before you click Save you can click Cancel to cancel the new service request and return to the Summary view.

Creating Alerts

You can create alerts (see [Figure 13](#)) with different kinds of warning information, such as for fraud detection, in order to alert other members of your organization.

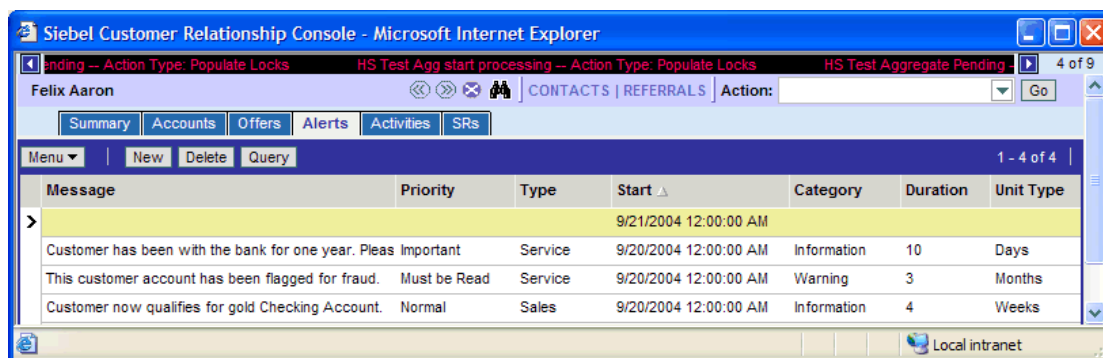


Figure 13. Adding Alerts View

To add an alert

- Start a customer session for the customer for which you are adding the alert.
- Select the Alerts session tab and click New.
- Complete all of the fields, which are described in the following table.

Field	Description
Category	The level of severity for the alert.
Duration	Together with Unit Type determines the valid dates for the alert.
Message	The context of the alert.
Type	The type of alert.
Unit Type	Together with Duration determines the valid dates for the alert.
Priority	The level of importance of the alert.

- 4 Click Save.

NOTE: At any time before you click the Save button you can click Cancel to cancel the alert and return to the Summary view.

Adding Activities

With an Activity (see [Figure 14](#)) you can:

- Create a new activity record
- Record details of the nature of the interaction and planned action required
- Assign the activity to a resource and place a time stamp on the activity

The screenshot shows the Siebel Customer Relationship Console interface in Microsoft Internet Explorer. The browser title is 'Siebel Customer Relationship Console - Microsoft Internet Explorer'. The page header shows 'Bobby Abbot' and a navigation bar with 'CONTACTS | REFERRALS | Action:'. A banner at the top right says 'Open enrollment for all company benefits begins next month'. The main form area has a 'Menu' dropdown and 'Save' and 'Cancel' buttons. The form fields are organized into two columns. The left column includes 'Type: Other', 'Comments', 'Planned Start: 3/16/2004 12:57 PM', 'Duration', 'Planned Completion', and 'Due: 3/16/2004 12:00 AM'. The right column includes 'Repeat Frequency', 'Unit', 'Account #', 'Priority', 'Company', 'Site', 'Employees: SADMIN', and 'Contacts: Abbot'. The status bar at the bottom shows 'Done' and 'Internet'.

Figure 14. Adding Activities View

To add an activity

- 1 Start a customer session for the customer for which you are adding the activity.
- 2 Select the Activities session tab and click New.
NOTE: You can also use the Action menu item to Add an Activity.
- 3 Complete the fields as necessary, some of which are described in the following table.

Field	Description
Type	The type of activity.
Planned Start	The date the activity is planned to start.
Priority	The importance of the activity.
Description	The nature of the activity.
Duration	The number of minutes for which the activity is scheduled.
Planned Completion	The planned completion date for the activity. It is equivalent to the planned start plus the duration.
Due	The due date for the completion of the activity.

Field	Description
Repeat Frequency	The frequency of the activity, such as daily or weekly.
Until	The date reoccurrence of the activity will cease.

- 4 Click Save.

NOTE: At any time before you click Save you can click Cancel to cancel the activity and return to the Summary view.

Adding Prospects and Referrals

Figure 16 shows the New Prospect form view. This view allows you to construct a new prospect or contact record in the Siebel database. A prospect is a potential customer for your organization.

When you add a prospect, Siebel CRC also creates a referral for that new contact. You can also add a referral in a separate process for an existing customer.

When adding a referral (see Figure 15) you can:

- Capture a referral
- Monitor captured referrals
- Enter basic details of the referral
- Associate the referral to the source agent

For information on reviewing the referrals you created, see ["Referrals" on page 12](#).

To add a referral for an existing customer

- 1 Start a customer session for the customer for which you are adding the referral.
- 2 From the menu bar, click the down arrow in the Action field and select Add a Referral.
- 3 Click Go and complete the following fields as necessary.

Field	Description
Referral Name	The name that uniquely defines the referral record. This field is automatically populated with the customer name, date, and time.
Sales Method	The sales method used to solicit the new referral.
Comments	The context of the referral.
Product Line	The product line associated with the referral.

- 4 Click Save.

NOTE: At any time before you click Save you can click Cancel to cancel the referral and return to the Summary view.

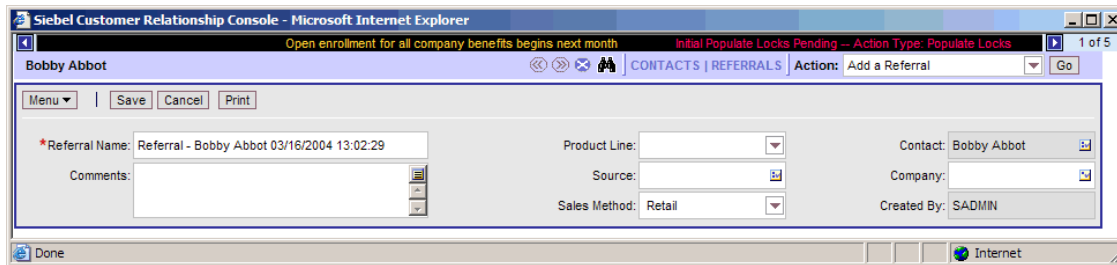
The screenshot shows the Siebel Customer Relationship Console in a Microsoft Internet Explorer browser window. The title bar reads 'Siebel Customer Relationship Console - Microsoft Internet Explorer'. The browser address bar shows a URL. The main content area is titled 'Bobby Abbot' and has a navigation bar with 'CONTACTS | REFERRALS' and an 'Action: Add a Referral' dropdown menu. Below the navigation bar is a menu bar with 'Menu', 'Save', 'Cancel', and 'Print'. The form contains several fields: 'Referral Name' (text box with value 'Referral - Bobby Abbot 03/16/2004 13:02:29'), 'Comments' (text area), 'Product Line' (dropdown menu), 'Source' (dropdown menu), 'Sales Method' (dropdown menu with value 'Retail'), 'Contact' (text box with value 'Bobby Abbot'), 'Company' (text box), and 'Created By' (text box with value 'SADMIN'). The status bar at the bottom shows 'Done' and 'Internet'.

Figure 15. New Referral View

To add a prospect and a referral

- 1 From the menu bar, click the down arrow in the Action field and select Add a Prospect.
- 2 Click Go and complete the fields.
- 3 Click Next and complete the fields as described in [Step 3](#) in "To add a referral for an existing customer" on page 31.

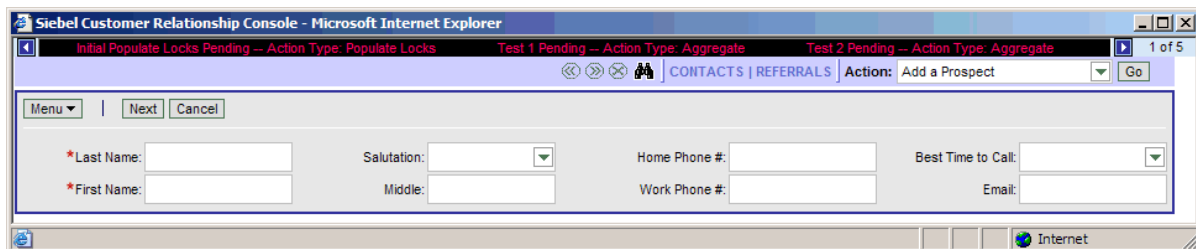
The screenshot shows the Siebel Customer Relationship Console in a Microsoft Internet Explorer browser window. The title bar reads 'Siebel Customer Relationship Console - Microsoft Internet Explorer'. The browser address bar shows a URL. The main content area is titled 'Bobby Abbot' and has a navigation bar with 'CONTACTS | REFERRALS' and an 'Action: Add a Prospect' dropdown menu. Below the navigation bar is a menu bar with 'Menu', 'Next', and 'Cancel'. The form contains several fields: 'Last Name' (text box), 'First Name' (text box), 'Middle' (text box), 'Salutation' (dropdown menu), 'Home Phone #' (text box), 'Work Phone #' (text box), 'Best Time to Call' (dropdown menu), and 'Email' (text box). The status bar at the bottom shows 'Internet'.

Figure 16. New Prospect View

Entering Customer Responses to Offers

In Oracle's Siebel CRC application you can directly enter a customer's response to an offer which you have presented. A positive response generates a referral for the customer. A negative response removes the offer from the contact's record to avoid a future presentation of the offer.

To record a customer response to an offer

- 1 Begin a customer session and click the Offers session tab.
- 2 Drill down on the offer name to review the detailed information.
- 3 Click Response and select the response type and enter descriptive comments.
- 4 Click Next.

- If the response type is "Rejected," then the offer disappears from the customer record.
- If the response type is "Accepted," then the offer disappears from the customer record and a referral is generated.

A

Query Operators

When you create a query, you use operators, or conditions, which are used to search the database for matching records. In [Table 7](#) and [Table 8](#), operators are shown in uppercase; however, query strings are not case-sensitive, and the operators do not have to be in uppercase.

There are simple queries and compound queries. Simple query operators can be used on their own. When you perform a compound query, you must use parentheses to control the order in which the search for matching records is performed.

Table 7. Simple Query Operators

Operator	Description	Example
*	Wildcard operator. Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space.	<p>*rang* finds <i>arrange, arranged, orange, orangutan, range, ranges, ranging, rang, strange, stranger, strangest, strangle, wrangle</i>, and so on.</p> <p>You cannot use * to find dates.</p> <p>To find words on more than one line in a field, you should use * to separate the words. You cannot query for control characters or nonprintable characters, such as line feeds (LF) or carriage returns (CR).</p>
?	Wildcard operator. Placed anywhere in a string returns records containing the characters specified in the string plus any one additional character which appears at the location of the question mark.	<p>?rag finds <i>brag, crag, or drag</i>, but not <i>bragging</i>.</p> <p>t?pe finds <i>type</i> and <i>tape</i>, but not <i>tripe</i>.</p>
""	Surrounds a string that, unless modified by a wildcard (* or ?), must be matched exactly. Quotes let you query for a group of words in its exact order.	"Sun Solaris" finds records that contain <i>Sun Solaris</i> in the query field.
=	Placed before a value, returns records containing a value equal to the query value.	=Smith finds all records for which the value in the query field is <i>Smith</i> . It also turns off wildcards within the query value.
<	Placed before a value, returns records containing a value less than the query value.	<6/20/01 finds all records in which the value of the query field is before 20 June 2001. When entering a date, use the format that is specific to your implementation.
>	Placed before a value, returns records containing a value greater than the query value.	>5/31/01 finds all records in which the date in the query field is later than 31 May 2001. When entering a date, use the format that is specific to your implementation.

Table 7. Simple Query Operators

Operator	Description	Example
<>	Placed before the value, returns records containing a value that is not equal to the query value.	<>6/20/01 finds all records in which the date in the query field is not 20 June 2001. <>Paris finds all the records in which the value in the query field is not <i>Paris</i> .
<=	Placed before a value, returns records containing a value less than or equal to the query value.	<=500 finds all the records in which the value in the query field is less than or equal to 500.
>=	Placed before a value, returns records containing a value greater than or equal to the query value.	>=500 finds all records in which the value in the query field is greater than or equal to 500.
NOT LIKE, not like	Placed before a value, returns records not containing the value.	NOT LIKE Smi* finds all records in which the value in the query field do not start with <i>Smi</i> .
IS NULL, is null	Placed in the query field, returns records for which the query field is blank.	Enter IS NULL in the Due Date query field to find all records for which the Due Date field is blank.
IS NOT NULL, is not null	Placed in the query field, returns records for which the query field is not blank.	Enter IS NOT NULL in the Due Date query field to find all records for which the Due Date field is not blank.
~	Placed before LIKE and a value with a wildcard operator, returns all matching records regardless of case.	~LIKE Smi* finds all records in which the value in the query field starts with <i>Smi</i> , <i>smi</i> , <i>SMI</i> , and so on. Using this operator may affect performance.

NOTE: If performance is poor when you use the asterisk (*), substitute "IS NOT NULL" in your query. This often improves performance, and will return the same sets of records.

Table 8. Compound Query Operators

Operator	Description	Example
AND, and	Placed between values, returns only records for which all the given conditions are true.	*performance* AND *memory* finds all records that contain both <i>performance</i> and <i>memory</i> in the query field.
OR, or	Placed between values, returns records for which at least one condition is true.	*performance* OR *memory* finds all records that contain either <i>performance</i> or <i>memory</i> in the query field. performance* OR memory* finds all records that start with either <i>performance</i> or <i>memory</i> in the query field.
NOT, not	Placed before a value, returns only records that do not contain the value.	*performance* AND NOT LIKE *memory* finds all records that contain <i>performance</i> but not <i>memory</i> in the query field. NOT (performance OR memory) finds all records that contain neither <i>performance</i> nor <i>memory</i> in the query field.
()	Surrounds the values and operators that will be processed first, regardless of the default processing order.	(sun OR moon) AND NOT stars returns records that contain <i>sun</i> or <i>moon</i> , but not <i>stars</i> , in the query field.
LIKE, like	Placed before a value, returns records containing the value.	(performance* OR memory*) AND LIKE (problem) finds all records in which the query field starts with <i>performance</i> or <i>memory</i> and also includes <i>problem</i> . Note that the LIKE operator is case sensitive. To find matches regardless of case, see (~).

Index

A

account transaction information (HTML), viewing 21

Accounts session view

about 20

account transaction information (HTML), viewing 21

Action drop-down list

using to add records 16

Action item, about using 27

activities

adding an activity 30

adding, about 30

Activities session view

about 24

activity information provided 25

adding information

See information, adding

alerts

adding an alert 29

alert bar, about 13

contact alerts 20

creating, about 29

Alerts session view

about 23

alert information provided 23

asterisk, in field controls 15

audience for guide 7

B

binoculars icon, using 11

browser

security 9

Siebel application, maintaining in browser window 9

buttons

close current contact session icon 13

customer session navigation button diagram 12

next contact icon 12

previous contact icon 13

C

close current contact session icon 13

compound query operators 38

contacts

Accounts session view, about 20

Activities session view, about 24

activity information provided 25

alert information provided 23

Alerts session view, about 23

close current contact session icon 13

contact alerts 20

contact photo, about displaying 13

contacts, searching for 18

customer session views, about 19

customer session, starting 18

navigating to 11

next contact icon 12

Offers session view, about 22

previous contact icon 13

querying session information (HTML) 19

search view, using 17

Service Request (SR) session view, about 25

service request information provided 26

signature button, about 13

summary session view, about 19

CRC

See Siebel CRC

customer session

Accounts session view, about 20

Activities session view, about 24

activity information provided 25

alert information provided 23

Alerts session view, about 23

close current contact session icon 13

contact photo, about displaying 13

contacts, searching for 18

navigation buttons 12

next contact icon 12

Offers session view, about 22

previous contact icon 13

querying session information (HTML) 19

search view, using 17

Service Request (SR) session view, about 25

service request information provided 26

starting customer session 18

summary session view, about 19

views, about 19

customers

offers, entering customer responses 32

referrals, adding for existing customer 31

D

- data, saving** 16
- date fields, using and example** 15
- drop-down lists**
 - about 16
 - Action drop-down list, using 16

E

- exiting Siebel CRC** 10

F

- features**
 - key features 7

fields

- adding records to Siebel CRC 16
- asterisks in field controls 15
- drop-down lists, about 16
- field controls 15
- numerical fields 15
- saving data 16
- text fields 15
- visibility and records 15
- form, using field controls to edit** 15

G

- getting started**
 - access and responsibilities 9
 - accessing URL 8
 - exiting Siebel CRC 10
 - Web browser settings 9

H**HTML**

- account transaction information, viewing 21
- actions, accessing available actions 12
- customer responses, entering 32
- offer information, viewing 23
- prospect and a referral, adding 32
- querying for session information 19
- search menu 11
- service requests, adding 28

I

- information, adding**
 - Action item, about using 27
 - activities, about adding 30
 - activities, adding 30
 - alerts, about creating 29
 - alerts, adding 29
 - customer responses to offers (HTML), entering 32

- prospects and referral (HTML), adding 32
- prospects and referrals, about adding 31
- referral, adding for an existing customer 31
- service requests (HTML), adding 28
- service requests, about adding 27

information, locating

- account transaction information (HTML), viewing 21
- Accounts session view, about 20
- Activities session view, about 24
- activity information provided 25
- alert information provided 23
- Alerts session view, about 23
- contacts, searching for 17
- customer session views, about 19
- customer session, starting 18
- offer information (HTML), viewing 23
- Offers session view, about 22
- querying session information (HTML) 19
- Service Request (SR) session view, about 25
- service request information provided 26
- start session, about 18
- summary session view, about 19

J**Java CRC**

- actions, accessing 12
- close current contact session icon 13
- contact photo, about displaying 13
- contacts, navigating to 11
- customer session navigation buttons 12
- exiting Siebel eBusiness Application 10
- next contact icon 12
- previous contact icon 13
- Referrals, about generating and reviewing 12
- scrolling message bar 13
- search menu 11
- Siebel CRC window diagram 11
- signature button, about 13

job titles 7**L****lists**

- Action drop-down list, using to add records 16
- drop-down lists, about 16
- using field controls to edit 15

M

- message, scrolling message bar** 13

N**navigation buttons**

- close current contact session icon 13
- diagram 12
- next contact icon 12
- previous contact icon 13

next contact icon 12**numerical fields, using** 15**O****offers**

- entering customer responses (HTML) 32

Offers session view

- about 22
- offer information (HTML), viewing 23

operators

- compound query operators 38
- simple query operators 35

P**position**

- defined 9

previous contact icon 13**prospects**

- adding, about 31
- adding, and a referral (HTML) 32

Q**Query Assistant, note about using** 19**querying**

- compound query operators 38
- session information (HTML), querying for 19
- simple query operators 35

R**records**

- about and field visibility 15
- adding records to Siebel CRC 16
- asterisks in field controls 15
- determining visibility 9
- drop-down lists, about 16
- field controls 15
- saving data 16
- text fields 15

referrals

- about generating and reviewing 12
- adding, about 31
- adding, and a prospect (HTML) 32
- existing customer, adding for 31

responsibilities

- defined 9

S**saving data** 16**search view**

- contacts, searching for 18
- using 17

security, Web browser security 9**Service Request (SR) session view**

- about 25
- service request information provided 26

service requests

- adding (HTML) 28
- adding, about 27

Siebel application

- maintaining in browser window 9

Siebel CRC

- actions, accessing 12
- adding records 16
- application window diagram 11
- close current contact session icon 13
- contact photo, about displaying 13
- contacts, navigating to 11
- customer session navigation buttons 12
- exiting Siebel eBusiness Application 10
- next contact icon 12
- previous contact icon 13
- Referrals, about generating and reviewing 12
- scrolling message bar 13
- search menu 11
- signature button, about 13

signature button, about using 13**simple query operators** 35**Special Offers, about** 20**starting**

- See getting started

summary session view

- about 19
- contact alerts 20
- Special Offers 20

T**text fields, using** 15**W****Web browser settings**

- browser security 9
- browser window, maintaining in Siebel application in 9

